ORACLE®
PeopleSoft

PeopleSoft HCM 9.2: ePerformance

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PeopleSoft HCM 9.2: ePerformance

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Preface

Understanding the PeopleSoft Online Help and PeopleBooks

The PeopleSoft Online Help is a website that enables you to view all help content for PeopleSoft Applications and PeopleTools. The help provides standard navigation and full-text searching, as well as context-sensitive online help for PeopleSoft users.

PeopleSoft Hosted Online Help

You access the PeopleSoft Online Help on Oracle's PeopleSoft Hosted Online Help website, which enables you to access the full help website and context-sensitive help directly from an Oracle hosted server. The hosted online help is updated on a regular schedule, ensuring that you have access to the most current documentation. This reduces the need to view separate documentation posts for application maintenance on My Oracle Support, because that documentation is now incorporated into the hosted website content. The Hosted Online Help website is available in English only.

Note: Only the most current release of hosted online help is updated regularly. After a new release is posted, previous releases remain available but are no longer updated.

Locally Installed Help

If you are setting up an on-premises PeopleSoft environment, and your organization has firewall restrictions that prevent you from using the Hosted Online Help website, you can install the PeopleSoft Online Help locally. If you install the help locally, you have more control over which documents users can access and you can include links to your organization's custom documentation on help pages.

In addition, if you locally install the PeopleSoft Online Help, you can use any search engine for full-text searching. Your installation documentation includes instructions about how to set up Elasticsearch for full-text searching. See *PeopleSoft 9.2 Application Installation* for your database platform, "Installing PeopleSoft Online Help." If you do not use Elasticsearch, see the documentation for your chosen search engine.

Note: See Oracle Support Document 2205540.2 (PeopleTools Elasticsearch Home Page) for more information on using Elasticsearch with PeopleSoft.

Note: Before users can access the search engine on a locally installed help website, you must enable the Search field. For instructions, go to your locally installed PeopleSoft Online Help site and select About This Help >Managing Locally Installed PeopleSoft Online Help >Enabling the Search Button and Field in the Contents sidebar.

Downloadable PeopleBook PDF Files

You can access downloadable PDF versions of the help content in the traditional PeopleBook format. The content in the PeopleBook PDFs is the same as the content in the PeopleSoft Online Help, but it has

a different structure and it does not include the interactive navigation features that are available in the online help.

Common Help Documentation

Common help documentation contains information that applies to multiple applications. The two main types of common help are:

- Application Fundamentals

- Using PeopleSoft Applications

Most product families provide a set of application fundamentals help topics that discuss essential information about the setup and design of your system. This information applies to many or all applications in the PeopleSoft product family. Whether you are implementing a single application, some combination of applications within the product family, or the entire product family, you should be familiar with the contents of the appropriate application fundamentals help. They provide the starting points for fundamental implementation tasks.

In addition, the *PeopleTools: Applications User's Guide* introduces you to the various elements of the PeopleSoft Pure Internet Architecture. It also explains how to use the navigational hierarchy, components, and pages to perform basic functions as you navigate through the system. While your application or implementation may differ, the topics in this user's guide provide general information about using PeopleSoft Applications.

Field and Control Definitions

PeopleSoft documentation includes definitions for most fields and controls that appear on application pages. These definitions describe how to use a field or control, where populated values come from, the effects of selecting certain values, and so on. If a field or control is not defined, then it either requires no additional explanation or is documented in a common elements section earlier in the documentation. For example, the Date field rarely requires additional explanation and may not be defined in the documentation for some pages.

Typographical Conventions

The following table describes the typographical conventions that are used in the online help.

Typographical Convention	*Description*
Key+Key	Indicates a key combination action. For example, a plus sign (+) between keys means that you must hold down the first key while you press the second key. For Alt+W, hold down the Alt key while you press the W key.
. . . (ellipses)	Indicate that the preceding item or series can be repeated any number of times in PeopleCode syntax.
{ } (curly braces)	Indicate a choice between two options in PeopleCode syntax. Options are separated by a pipe (|).
[ ] (square brackets)	Indicate optional items in PeopleCode syntax.

Typographical Convention	*Description*
& (ampersand)	When placed before a parameter in PeopleCode syntax, an ampersand indicates that the parameter is an already instantiated object. Ampersands also precede all PeopleCode variables.
⇒	This continuation character has been inserted at the end of a line of code that has been wrapped at the page margin. The code should be viewed or entered as a single, continuous line of code without the continuation character.

ISO Country and Currency Codes

PeopleSoft Online Help topics use International Organization for Standardization (ISO) country and currency codes to identify country-specific information and monetary amounts.

ISO country codes may appear as country identifiers, and ISO currency codes may appear as currency identifiers in your PeopleSoft documentation. Reference to an ISO country code in your documentation does not imply that your application includes every ISO country code. The following example is a country-specific heading: "(FRA) Hiring an Employee."

The PeopleSoft Currency Code table (CURRENCY_CD_TBL) contains sample currency code data. The Currency Code table is based on ISO Standard 4217, "Codes for the representation of currencies," and also relies on ISO country codes in the Country table (COUNTRY_TBL). The navigation to the pages where you maintain currency code and country information depends on which PeopleSoft applications you are using. To access the pages for maintaining the Currency Code and Country tables, consult the online help for your applications for more information.

Region and Industry Identifiers

Information that applies only to a specific region or industry is preceded by a standard identifier in parentheses. This identifier typically appears at the beginning of a section heading, but it may also appear at the beginning of a note or other text.

Example of a region-specific heading: "(Latin America) Setting Up Depreciation"

Region Identifiers

Regions are identified by the region name. The following region identifiers may appear in the PeopleSoft Online Help:

• Asia Pacific

• Europe

• Latin America

• North America

Industry Identifiers

Industries are identified by the industry name or by an abbreviation for that industry. The following industry identifiers may appear in the PeopleSoft Online Help:

- USF (U.S. Federal)

- E&G (Education and Government)

Translations and Embedded Help

PeopleSoft 9.2 software applications include translated embedded help. With the 9.2 release, PeopleSoft aligns with the other Oracle applications by focusing our translation efforts on embedded help. We are not planning to translate our traditional online help and PeopleBooks documentation. Instead we offer very direct translated help at crucial spots within our application through our embedded help widgets. Additionally, we have a one-to-one mapping of application and help translations, meaning that the software and embedded help translation footprint is identical—something we were never able to accomplish in the past.

Using and Managing the PeopleSoft Online Help

Click the Help link in the universal navigation header of any page in the PeopleSoft Online Help to see information on the following topics:

- What's new in the PeopleSoft Online Help.

- PeopleSoft Online Help accessibility.

- Accessing, navigating, and searching the PeopleSoft Online Help.

- Managing a locally installed PeopleSoft Online Help website.

Related Links for PeopleSoft HCM

PeopleSoft Information Portal

My Oracle Support

PeopleSoft Training from Oracle University

PeopleSoft Video Feature Overviews on YouTube

PeopleSoft Business Process Maps (Microsoft Visio format)

Contact Us

Send your suggestions to PSOFT-INFODEV_US@ORACLE.COM. Please include release numbers for the PeopleTools and applications that you are using.

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Chapter 1

Getting Started with ePerformance

ePerformance Overview

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

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

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

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

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

- Generate evaluations.

- Define evaluation criteria.

- Introduce mid-period checkpoints to track employee progress.

- Manage multiple participants.

- Enter evaluation data, including notes, ratings, weights, and comments.

- Consolidate feedback from multiple sources into the manager/mentor's evaluation.

- Submit the manager/mentor evaluation for review and approval.

- Perform administrative tasks, such as entering preliminary ratings, transferring, reopening, canceling, and deleting documents.

- Create and publish business objective pages.

- Cascade objective items down to individual performance documents.

New ePerformance Features in HCM 9.2

ePerformance Business Processes

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

This diagram illustrates the flow of ePerformance business processes — assuming that the document template implements the establish criteria, track progress, multi-participant, review, and approval processes.
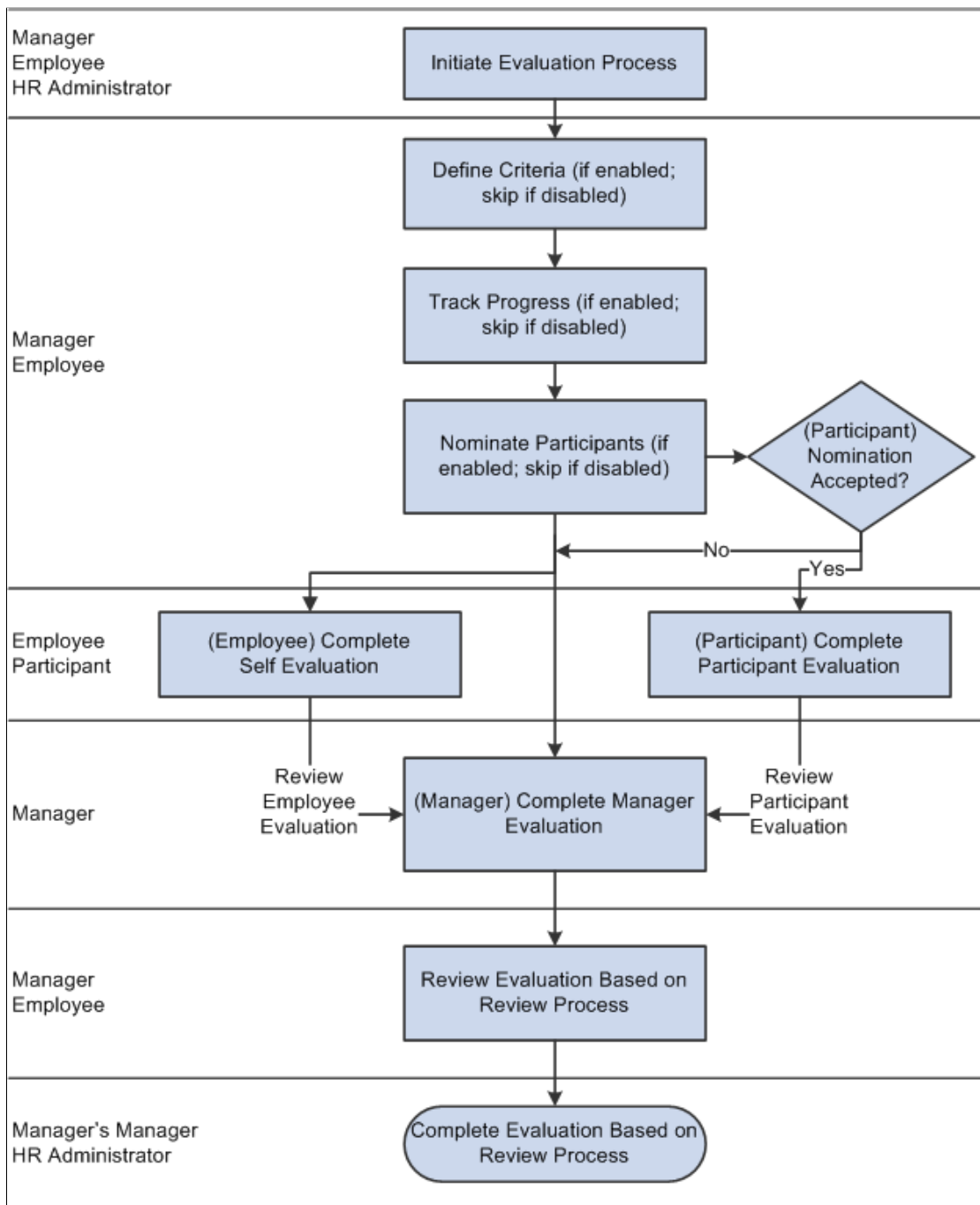
The ePerformance business process includes these steps:

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

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

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

   See Understanding Document Generation.

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

   Criteria modifications include: adding free-form or predefined criteria, modifying the text of document criteria, or removing criteria. If integrating with Enterprise Learning Management, you can add learning activity.

   See Understanding Evaluation Criteria Modification.

3. (Configurable) The manager provides feedback on the employee's progress and completes the checkpoint. After that, employee and manager adjust and finalize the criteria before starting the evaluations.

   See Understanding Mid-Period Checkpoints.

4. (Configurable) The employee or manager nominates participants to provide additional feedback.

   See Understanding the Nomination and Tracking Processes.

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

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

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

   This step consists of rating evaluation items and entering comments.

   See Understanding Evaluation Data Entry.

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

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

   See Understanding Feedback Consolidation.

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

8. (Configurable) The manager sends the evaluation to the employee for review.

9. (Configurable) The manager submits the evaluation for approval.

   See Understanding Review and Approval Processes.

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

Administrative Processes

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

- Transfer evaluations.

- Change evaluation status.

- Cancel evaluations.

- Delete evaluations.

- Enter preliminary ratings.

- View evaluation contents.

  See Managing Administrative Tasks.

Monitoring Evaluations

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

- Missing Documents report.

- Late Documents report.

- Status Summary chart.

- Rating Distribution Summary chart.

  See Understanding Inquiry Pages.

ePerformance Integrations

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

ePerformance integrates with these PeopleSoft applications:

- HR - ePerformance documents use many of the common component tables to supply the basic data.

- Planning Salaries - The Merit Increase process uses data from the employee's performance document.

- Profile Manager - ePerformance uses the content catalog and profile types to supply content for performance and development documents. Evaluation criteria from the employee's performance document can update the employee's profile.

- Enterprise Learning Management - ePerformance documents can have learning sections that display a list of learning relevant to the current performance evaluation period. Managers and employees can access Enterprise Learning Management from a document to search for or add learning for the employee. Administrators can search and view learning courses for employees.

- Career Planning - ePerformance documents can include the career planning summary section that displays employees' career information. From the section, managers can access the transaction in Manager Self Service to update employees' career plans.

The implementation topics of this online help discuss integration considerations.

Related Links
Integrating with Enterprise Learning Management

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ePerformance Implementation

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

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

Other Sources of Information

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

Refer to the *PeopleSoft HCM 9.2 - Reorganization of Component Interface Permissions* (Doc ID 2342162.1) MOS posting for a list of system-delivered CIs and their usage, the mapping of CIs and associated permission lists, and the mapping of CI permission lists and user roles.

See Also *PeopleTools: Setup Manager*

Related Links
Application Fundamentals

Chapter 2

Setting Up ePerformance

Defining System Settings

To define system settings for ePerformance, use the ePerformance (EP_INSTALLATION) component.

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

Page Used to Define System Settings

Page Name	Definition Name	Usage
ePerformance Page	EP_INSTALLATION	Define system settings.

Understanding System Settings

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

- Whether users can generate documents in languages other than the base language.

- Debug settings.

- Starting number for document ID generation.

- Fields that appear on the page from which users select documents.

- The email notifications that the system generates.

ePerformance Page

Use the ePerformance page (EP_INSTALLATION) to define system settings.

Navigation

Set Up HCM > Install > Product Specific > ePerformance Installation > ePerformance

Image: ePerformance page (1 of 5)

This example illustrates the fields and controls on the ePerformance page (1 of 5).

Image: ePerformance page (2 of 5)

This example illustrates the fields and controls on the ePerformance page (2 of 5).

Nominations
- ☑ Nomination was submitted (Recipient is Nominee)
- ☑ Nomination was accepted (Recipient is Submitter)
- ☑ Nomination was declined (Recipient is Submitter)
- ☑ Nomination was canceled (Recipient is Nominee)

Evaluations
- ☑ Employee completed their evaluation (Recipient is Manager)
- ☑ Manager completed evaluation (Recipient is Employee and Manager)
- ☑ Manager Sent evaluation back for rework (Recipient is Employee)
- ☑ Manager marks document Share with Employee(Recipient is Employee)
- ☑ Manager requested Employee acknowledgement (Recipient is Employee)
- ☑ Employee acknowledged the document (Recipient is Manager)
- ☑ Participant Evaluation was completed
- ☑ Evaluation was canceled (Recipient is Reviewer ID)

Administrative Task
- ☑ Due-date of document was changed (Recipient is Manager or Employee)
- ☑ HR reset status of Manager document (Recipient is Manager)
- ☑ Ownership of document was transferred (Recipient is new owner)
- ☑ Document was canceled

Image: ePerformance page (3 of 5)

This example illustrates the fields and controls on the ePerformance page (3 of 5).

Configure Document Selection Page - Displayed Fields
- ☑ Begin Date   ☑ Manager Name
- ☑ End Date   ☑ Job Title
- ☑ Document Status   ☐ Employee ID

Microsoft Outlook Integration
- ☐ Email Integration with ePerformance Notes
- ☐ Integration to Outlook Tasks   Reminder Days before Task Due Date [   ]

Cancel Document on Termination
- ☐ Cancel Document on Termination

Image: ePerformance page (4 of 5)

This example illustrates the fields and controls on the ePerformance page (4 of 5).

Image: ePerformance page (5 of 5)

This example illustrates the fields and controls on the ePerformance page (5 of 5).

Last Document ID	Enter the number from which the system begins generating document IDs. The system automatically generates the document ID by adding 1 to the Last Document ID.
	Warning! Entering a value that is lower than the value that appears can cause unpredictable results.
Debug Rating Calculations	Select this check box to have the system generate a debug/trace log every time it calculates the ratings in an evaluation. HR ePerformance administrators use the Debug/Trace Results page to review the results of each calculation performed for an evaluation.
	This helps track down any unexpected results when you build templates and test the configuration.

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

Allow Language Override

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

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

PS Audit Enabled

Select this check box to enable Detailed Item History audits.

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

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

See the topic on Setting Record Field Use Properties in the *PeopleTools: Application Designer Developer's Guide*.

Enable AutoSave

Select this check box to enable the AutoSave feature in ePerformance.

Note: Be sure to disable the popup blocker feature in your browser for the AutoSave feature to work properly.

For security purposes, you can set up in PeopleTools the ability to display inactivity warnings to users, and time out their browser sessions if they don't respond to the warning messages within a specific timeframe. When the AutoSave feature is selected, the system automatically saves documents before browser sessions are timed out, preventing users' unsaved data from being lost due to inactivity.

When enabled, the AutoSave feature applies to all performance and development document pages (including modal pages) in the EP_APPR_BASE and EP_APPR_MAIN components, which are used for defining evaluation criteria, tracking mid-period progress, and entering self, manager, as well as peer (or other role-based) evaluations.

	This feature is not supported in performance notes.
Enable Rich Text in Modal only	Select this check box for users to enter evaluation comments in a modal window. By default, this feature is disabled. Enable this option if you experience performance issues when entering comments in rich-text fields on main document pages.
	When enabled, comments fields are displayed as read-only on documents. To enter comments, users click either the Edit Comments link or Writing Tools link to open a modal page, where they compose comments in plain or rich text.
	When disabled, users enter comments (plain or rich text) in comments fields directly.
Don't reposition document on Save	Select this check box to allow the cursor to remain in the same position when documents are saved. By default, this option is disabled.
	Clear this check box for the cursor to reposition to the top of the page when documents are saved.

Configure e-Mail Notifications

Select the check box next to each event type for which you want the system to automatically generate and send notifications. Event types are grouped into these categories for better organization: Document Creation, Define Criteria & Track Progress, Nominations, Evaluations, and Administrative Task.

Several event types have the notification recipient set as manager or employee. What it means is that the recipient will be determined by the role performing the event. For example, if the manager approves the evaluation criteria document and the Evaluation Criteria is Approved event type is enabled, the system sends a notification to the employee of the document.

Configure Document Selection Page - Displayed Fields

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

See Accessing Documents.

Microsoft Outlook Integration

Email Integration with ePerformance Notes	Select to enable the functionality to allow users to insert email content from Microsoft Outlook directly into performance notes
Integration to Outlook Tasks	Select to enable the functionality to create tasks in Microsoft Outlook for users to keep track of due dates in performance and development documents.
Reminder Days before Task Due Date	Enter the number of days before the due date that a task reminder should be set. Enter this information if the Integration to Outlook Tasks field is selected.

Cancel Document on Termination

Cancel Document on Termination   Select to enable the functionality to automatically cancel in-progress documents for employees who have been terminated in the HR system.

By default, this option is not selected and subsequent fields are not visible.

All Document Types   Select for the process to cancel current documents of all document types for terminated employees.

Selected Document Types and **Document Types**   Select for the process to cancel current documents that are associated with specific document types.

When selected, add the document types in the Document Types section.

Configure Due Date Notifications

Enable Due Date Notifications   Click to activate the Due Date Notifications feature that sends automatic email reminders to users when their documents are due for updates.

When this feature is enabled, be sure to specify the scheduling options in the Alert Details and Notification Details sections accordingly.

Alert Type   Displays the types of reminders that the Due Date Notifications feature supports. Values are *Courtesy Reminder, Warning Reminder,* and *Critical Reminder*.

Number of Days before Due Date   Enter the number of days before the due date that email notifications for the corresponding alert type should be sent. The value for courtesy reminder must be greater than the one for warning reminder, which must be greater than the one for critical reminder.

For example, the courtesy reminder option is enabled for the Define Criteria Approval due date type, and reminders are set to be sent 60 days before the due date. If the Define Criteria step due date of a document is on April 1, the systems sends a courtesy reminder for it on February 1 of the same year.

Due Date Type   Displays the steps in an evaluation cycle for which due date notifications can be sent.

Send Courtesy Reminder, Send Warning Reminder, and **Send Critical Reminder**   Select the check boxes for the system to send a combination of courtesy reminders, warning reminders, and critical reminders for the corresponding evaluation step in documents, based on the specified alert type values.

Notification Schedule created on   Displays the date and time that the initialization process was run.

The initialization process extracts the due date information of all *Evaluation In Progress* evaluation documents, and loads it into the schedule table (EP_NOTIFY_TBL) to be used to generate due date notifications for steps that are not completed or canceled.

In addition to specifying the alert and notification details, you also need to run the initialization process as part of the setup for the Due Date Notifications feature, if there are evaluation documents in the system that are still in progress. The initialization process is not necessary, if there are no in-progress documents in the system (for example, at the end of an evaluation cycle).

See Also Setting Up Due Date Notifications

Configure Automatic Transfers

Enable Automatic Transfers

Click to activate the Automatic Document Transfer feature that, upon the termination of managers, automatically transfers in progress documents that they own to their next-level-up managers.

See Also Understanding Automatic Document Transfer

Access Type used for Transfers

Select the access type that the Direct Reports functionality uses to identify the next-level-up manager for each document in the automatic transfer. Values are:

By Department Manager ID

By Part Posn Mgmt Dept Mgr ID

By Part Posn Mgmt Supervisor

By Reports To Position

By Supervisor ID

For more information about access types, see "Understanding Direct Reports Functionality" (PeopleSoft HCM 9.2: Application Fundamentals).

Working with Manage Profiles

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

Using Rating Models

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

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

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

See "Defining Rating Models" (PeopleSoft HCM 9.2: Human Resources Manage Profiles).

Using the Content Catalog

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

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

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

- MISSION

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

- INITIATIVE

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

- GOAL

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

- RESP (responsibility)

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

- COMPETENCY

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

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

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

MISSION	INITIATIVE	GOAL	RESP	COMPETENCY
• Leading supplier of paper products. • Superior customer value. • Renowned research university.	• Increase shareholder value. • Enhance customer productivity. • Deliver innovative solutions.	• Increase customer satisfaction by 10%. • Increase cash reserves. • Cut operational expenses by 3% by fiscal year end.	• Participate in quarterly close process. • Adhere to accounting standards. • Prepare quarterly and annual financial reports.	• Abstract thinking. • Analytical thinking. • Conceptual thinking.

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

This field in Manage Profiles maps	To this field in ePerformance
JPM_CAT_TYPE	EP_JPM_CAT_TYPE
JPM_CAT_ITEM_ID	EP_JPM_CAT_ITEM_ID
EFFDT	EFFDT
EFF_STATUS_DESCR	EFF_STATUS
JPM_DESCR90	EP_TITLE
RATING_MODEL	RATING_MODEL
JPM_DATE_1	EP_ITEM_DUE_DT
JPM_DATE_2	EP_ITEM_REMIND_DT
JPM_TEXT1325_1	EP_DESCR254
JPM_TEXT1325_2	EP_MEASURE

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

See "Defining Content Items" (PeopleSoft HCM 9.2: Human Resources Manage Profiles).

Using Profile Types

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

You can use profiles in ePerformance in these ways:

• To download content items from a nonperson profile into a document template.

• To download the content items from a nonperson profile into a performance or development document.

• To update or create an employee's person profile (ePerformance supports any person profile type for this purpose).

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

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

This field in a Non-Person Profile maps	To this field in ePerformance	Field Label in ePerformance
JPM_CAT_ITEM_ID	EP_JPM_CAT_ITEM_ID	Item ID
RATING_MODEL	RATING_MODEL	Rating Model
JPM_RATING1	EP_TARGET_RATING	Target Rating
JPM_PCT_1	EP_WEIGHT	Weight
JPM_PCT_2	EP_MIN_WEIGHT	Min Weight
JPM_MANDATORY	EP_ITEM_MANDTRY_SW	Mandatory
JPM YN 1	EP_ITEM_CRIT_SW	Critical
JPM_DATE_1	EP_ITEM_DUE_DT	Due Date
JPM_DATE_2	EP_ITEM_REMIND_DT	Reminder Date

These fields always come from the Content Catalog:

• JPM_DESC90

• JPM_TEXT_1325_1

• JPM_TEXT_1325_2

See "Understanding Profile Management" (PeopleSoft HCM 9.2: Human Resources Manage Profiles).

Working with Approvals and Reviews

ePerformance uses the Approval (PTAF_TXN) component to define its approval processes. There are a number of document review processes supported in ePerformance, and several of them include the approval element, which can be:

• ManagerOnly

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

• ManagerToAdmin

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

• AdminOnly

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

The approval process definition is linked to a document type using the Document Types Page.

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

See Understanding Review and Approval Processes.

Approving Documents From Email

ePerformance provides approvers the ability to process document approvals directly from emails using the HTML Email Approval feature. When the functionality is enabled for the document approval transaction in ePerformance, the system sends an email notification to approver(s) when the manager submits a performance or development document for approval. From the HTML email message, the approver can take the appropriate action, such as approve or deny the document, by clicking the appropriate link. To help the approver make the most informed decision, summary information of the document, such as document type, evaluation period, rating, approval history and comments history, is displayed as email content. If configured by the administrator, the document itself can also be available as an email attachment so that the approver has an option to review it in its entirety prior to approving or denying it on the email.

Note: To set up the system to include performance documents in approval emails as attachments, select *emailActionOptions* as the email processing class for the *PerformanceManagement* process on the Transaction Configuration page. Select *emailActionOptionsNoAttachment* to not include documents in approval emails.

The approver can access the View Approval Status Detail Page to review the status of the approval request and the evaluation approval chain by clicking the view document approval request link at the end of the email.

Note: As delivered, the HTML Email Approval feature is disabled for all transactions.

For more information on configuring HTML email approvals, see "Triggering Email Collaboration" (PeopleSoft 9.2: Approval Framework).

> ▶   PeopleSoft 9 2 HTML Email Approvals

Working with Delegations

Using the PeopleSoft Delegation Framework, ePerformance provides administrators and managers the ability to authorize someone in the system to:

• Approve performance and development documents.

• Update performance and development documents.

For more details on setting up and working with delegations in HCM applications, see "Working with Self-Service Delegation" (PeopleSoft HCM 9.2: Application Fundamentals).

Delegating Document Approvals

Approvers can delegate the document approval responsibility to peers or subordinates in their absence. To delegate the approval transaction:

1. The *Approve Performance Document* (EP_APPRAISAL) transaction must be activated on the Configure Delegation Transaction page. This transaction is inactive by default.

2. The manager creates a delegation request by specifying a delegation period, selecting the *Approve Performance Document* transaction and assigning a proxy using the Manage Delegation component under the Self Service menu.

   The administrator can add delegation requests on behalf of managers under the Workforce Administration menu.

3. Submit the request.

   Once the proxy accepts the request, he or she will be given the rights to approve documents on the approver's behalf during the specified delegation period.

Delegating Authority to Update Documents

Managers and administrators can delegate peers or subordinates to update performance and development documents in their absence. To delegate the update ePerformance document transaction:

1. Make sure that the corresponding *Update Development Documents* (for development documents) and the *Update Performance Documents* (for performance documents) transactions are activated. They are set as active by default.

2. The manager creates a delegation request by specifying a delegation period, selecting the *Update ePerformance Dev Docs* or *Update ePerformance Docs* transaction and assigning a proxy using the Manage Delegation component under the Self Service menu.

The administrator can add delegation requests on behalf of managers under the Workforce Administration menu.

3. Submit the request.

    Once the proxy accepts the request, he or she will be given the rights to update documents on the approver's behalf during the specified delegation period.

Modifying Self-Service Pages and Email Notifications

This topic list prerequisites for sending email notification and discusses:

•   ePerformance text catalog settings.

•   Text catalog keys for documents.

•   Text substitution for documents.

•   Delivered email text entries for documents.

•   Text catalog keys for business objectives.

•   Text substitution for business objectives.

•   Delivered email text entries for business objectives.

•   Text substitution for due date notifications.

•   Delivered email text entries for due date notifications.

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

Related Links
"Configuring the Text Catalog" (PeopleSoft HCM 9.2: Application Fundamentals)

Prerequisites for Email Notifications

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

1. Activate emails using the Worklist System Defaults page.

2. Define the method used to notify originator using the System Workflow Rules page.

3. Define user notification preferences.

4. Define user's email address on the Email Addresses page.

5. Select email user as a routing preference on the User Profiles - Workflow page.

See "Configuring Self-Service Transactions" (PeopleSoft HCM 9.2: Application Fundamentals).

ePerformance Text Catalog Settings

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

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

These are the unique settings that apply to ePerformance:

Sub ID

ePerformance partitions its text catalog entries by document type (performance and development) and by business objective. To retrieve text catalog entries, follow the instructions in this table:

Text Catalog Entries For	Instruction
Development documents	Enter *D* in the Sub ID field and specify an applicable usage, text ID or both for the search.
Performance documents	Leave the Sub ID field blank and specify an applicable usage, text ID or both for the search.
Objectives *(business objectives)*	Enter *O* in the Sub ID field and specify an applicable usage, text ID or both for the search.

Text Catalog Keys for Documents

ePerformance designates these keys for storing and retrieving its entries for performance and development documents:

Section Type

From the list of section types that you defined on the Section Definition page, select the section type to which the text pertains.

Author Type

From the list of role types that you defined on the Role Types page, select the evaluator role of the evaluation on which the text appears.

User Role

From the list of predefined system roles, select the system role to which the text pertains. This key is used to select text depending on the user's system privileges; for example, update or approve.

Document Status

Select the status to which the text pertains: *Acknowledged, Shared with Employee, Canceled, Completed, Define Criteria, Evaluation in Progress, Not Started, Approval, Pending Acknowledgement* or *Track Progress.*

Track Progress Sub Status   Select the number of the checkpoint (from *1* to *11*) or *F* (for the Finalize Criteria step) to which the text pertains.

When the system retrieves text from the catalog:

*   Section type key takes precedence over author type.

*   Author type takes precedence over user role.

*   User role takes precedence over document status.

*   Document status takes precedence over track progress sub status.

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

Example of Text Retrieval for Documents in ePerformance

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

Text ID	Section Type (Key 1)	Author Type (Key 2)	User Role (Key 3)	Document Status (Key 4)	Track Progress Sub Status (Key 5)
Any ID	Goal	Blank	Employee	Blank	Blank
Any ID	Goal	Blank	Manager	Blank	Blank

First, the system looks for entries with an exact match on Key 1 (section type). If it finds entries that match the key value (including the wildcard entry), it searches only those entries for the other values and picks up the best match. In this case, the section type for both entries is Goal, so the system looks at Key 2 (author type). It applies the same logic. Both values in this case are wild cards, so both entries remain possibilities. Now, the system looks for a match on Key 3 (user role) and finds an exact match on Manager. The system only considers entries where Key 4 is blank if it cannot find any match on key 3. Similarly; the system looks at entries where Key 5 is blank if it cannot find any match using the other four keys.

Text Substitution for Documents

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

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

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

- %1: The document type from the Document Type table (EP_REVW_TYP_TBL).

- %2: The employee name formatted as first name, last name.

- %3: The employee ID.

- %4: The period begin date for the performance period.

- %5: The period end date for the performance period.

- %6: The due date of the evaluation.

- %7: The component link that transfers the user directly to the applicable evaluation.

- %8: The list of employees for whom an evaluation was successfully created during the background run.

- %9: The list of employees for whom evaluations were not created.

- %10: The Form-Create-Msg, which is one of two alternate messages that appear depending on the type of process that is run.

- %11: The manager's name.

- %12: The list of Items that were added, updated, copied or cascaded into the ePerformance document.

- %13: The department name.

- %14: The due date type (evaluation step).

- %15: The list of employees who are review participants for the document.

Delivered Email Text Entries for Documents

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

Text ID	Recipient	Condition for Creating
ADHOC_BASE_SBJ ADHOC_BASE_BDY	Manager or Employee	An adhoc message is sent from the criteria document.
ADHOC_MAIN_SBJ ADHOC_MAIN_BDY	Manager or Employee	An adhoc message is sent from an evaluation.
ADHOC-NOM-SBJ ADHOC-NOM-BDY	Multi-participant Evaluation Candidate	An adhoc message is sent from the Nominate Participants page for an evaluation.

Text ID	Recipient	Condition for Creating
BASE-COMPLETE-SBJ BASE-COMPLETE-BDY	Manager or Employee	A manager completes the Track Progress - Finalize Criteria step.
BASE-CREATE-SBJ BASE-CREATE-BDY	Manager or Employee	The performance or development document is created by the manager, employee or ePerformance HR administrator.
BASE-REOPEN-SBJ BASE-REOPEN-BDY	Manager or Employee	The evaluation criteria (of the Define Criteria step) is reopened by either the manager or employee. The Define Criteria step, if enabled, is the first step of the appraisal process.
BASELINE-UPDMGR-SBJ BASELINE-UPDMGR-BDY	Manager	A manager adds an item to the criteria document.
CHG-DUEDATE-SBJ CHG-DUEDATE-BDY	Manager, Employee or Multi-Participant Reviewer	A manager or ePerformance HR administrator changes the due date of an evaluation.
CHG-STATUS-SBJ CHG-STATUS-BDY	Manager, Employee or Multi-Participant Reviewer	An ePerformance HR administrator or manager resets the status of the evaluation to *Evaluation in Progress*. This can happen if an evaluation is prematurely advanced to the next stage of the process.
CHKPOINT-COMP-SBJ CHKPOINT-COMP-BDY	Employee	A manager marks a checkpoint as *Completed*.
CHKPOINT-SKIP-SBJ CHKPOINT-SKIP-BDY	Employee	A manager skips a checkpoint.
CREATE-MGRDOC-SBJ CREATE-MGRDOC-BDY	Manager	An ePerformance HR administrator has generated documents using the batch process.
CREATE-ROLEDOC-SBJ CREATE-ROLEDOC-BDY	Employee	An ePerformance HR administrator has generated documents using the batch process.
CRITERIA-APRV-SBJ CRITERIA-APRV-BDY	Manager or Employee	The Define Criteria step has been approved.
DOC-CANCEL-SBJ DOC-CANCEL-BDY	Manager and Employee	An ePerformance HR Administrator or manager cancels the evaluation.
EE-ACKNOWLEDGE-SBJ EE-ACKNOWLEDGE-BDY	Manager	An employee acknowledges that they have reviewed the manager evaluation.

Text ID	Recipient	Condition for Creating
EMPDOC-COMPLT-SBJ EMPDOC-COMPLT-BDY	Manager	An employee marks the employee evaluation as *Completed*.
EVAL-CANCEL-SBJ EVAL-CANCEL-BDY	Manager, Employee or Multi-Participant Reviewer	An ePerformance HR Administrator, manager or employee cancels an evaluation.
MGRDOC-COMPLT-SBJ MGRDOC-COMPLT-BDY	Employee	A manager marks the manager evaluation as *Completed*.
NOM-ACCEPT-SBJ NOM-ACCEPT-BDY	Manager or Employee	A nominated employee accepts a nomination for a multi-participant evaluation.
NOM-CANCEL-SBJ NOM-CANCEL-BDY	Nominee	A nomination for a multi-participant evaluation is canceled.
NOM-DECLINE-SBJ NOM-DECLINE-BDY	Manager or Employee	A nominated employee declines a nomination for a multi-participant evaluation.
NOM-SUBMIT-SBJ NOM-SUBMIT-BDY	Participant	Nominations to participate in multi-participant evaluations are sent to nominees.
OTHDOC-COMPLT-SBJ OTHDOC-COMPLT-BDY	Manager and/or employee	A participant in a multi-participant evaluation completes their evaluation.
ROLEDOC-COMPLT-SBJ ROLEDOC-COMPLT-BDY	Manager	An employee completes reviewing the evaluation.
RQST-ACK-SBJ RQST-ACK-BDY	Employee	A manager marks am evaluation as *Pending Acknowledgement*. This message is sent to the employee requesting that they formally acknowledge the evaluation.
RQST-REVIEW-SBJ RQST-REVIEW-BDY	Employee	A manager changes the status of a manager evaluation to *Shared with Employee*.
TP-REOPEN-SBJ TP-REOPEN-BDY	Manager or Employee	A manager reopens the (Track Progress) Finalize Criteria step. The Finalize Criteria step is part of Track Progress business process. If enabled, it is the third step of the appraisal process.
TRANSFER-MGR-SBJ TRANSFER-MGR-BDY	New Manager	A manager or ePerformance HR transfers an evaluation to a new manager.
TRKPROG-SHARE-SBJ TRKPROG-SHARE-BDY	Manager or Employee	Comments are shared during the Track Progress business process.

These notification messages are used in email body text only.

Text ID	Recipient	Condition for Creating
MGR-FAIL-LIST	Manager	An HR administrator creates manager and employee documents, but some employee documents are not created. This message lists the employees for whom documents were not created.
DO-NOT-RESPOND	Manager and Employee	This is used in all notices.

Text Catalog Keys for Business Objectives

ePerformance designates these keys for storing and retrieving its entries for business objectives:

Hierarchy Method   From the list of hierarchy methods that you defined on
                                  Objective Plan page, select the method to which the text
                                  pertains.

Section Type   From the list of section types that you defined on the Objective
                                  Section Definition page, select the section type to which the text
                                  pertains.

When the system retrieves text from the catalog, hierarchy method takes precedence over section type.

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

Text Substitution for Business Objectives

Text substitution for ePerformance documents and business objectives works the same. ePerformance delivers tokens and the substitution text for use in business objectives:

- %1: The Objective Item modified date.

- %2: The section name label.

- %3: The Section record number.

- %4: The section type.

- %5: The employee name formatted as first name, last name.

See Also Text Substitution for Documents

Delivered Email Text Entries for Business Objectives

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

Text Catalog ID	Recipient	Condition for Creating
PUB-OWNERS-SBJ PUB-OWNERS-BDY	Page owners	An Objective page is published.
PUB-ORGAN-SBJ PUB-ORGAN-BDY	Organization	An Objective page is published.
TRANS-SUB-NEW TRANS-NEW-OWNER	New page owner	An Objective page is transferred to a new owner.
TRANS-SUB-OLD TRANS-OLD-OWNER	Old page owner	An Objective page is transferred from the old owner to someone else.
CREATE-PAGE-SBJ CREATE-PAGE-BDY	Page owner	An Objective page has been created.
SUBMIT-PAGE-SBJ SUBMIT-PAGE_BDY	Page owner	An Objective page has been submitted for publication.
CASCADE-OBJ-EE-SBJ CASCADE-OBJ-EE-BDY	Employee	One or more objective items are cascaded to the employee's performance document.
CASCADE-OBJ-MG-SBJ CASCADE-OBJ-MG-BDY	Manager	One or more objective items are cascaded to the performance document of the manager's direct report.

Text Substitution for Due Date Notifications

ePerformance references the same list of tokens when creating text catalog entries for both documents and due date notifications.

Refer to the Text Substitution for Documents section for the list of tokens that are used in text catalog entries as subject lines and body messages for due date notifications.

See the Understanding Due Date Notifications topic for more information about the Due Date Notifications feature.

Delivered Email Text Entries for Due Date Notifications

This table lists the delivered text entries that ePerformance uses in system-generated due date email notifications. It specifies to whom and the condition when these notifications are generated and sent. Each delivered due date notification template uses two entries, one with the suffix _SBJ as the subject line and a corresponding entry with the suffix _BDY as the body of email messages.

Text Catalog ID	Recipient	Condition for Creating
ALERT_EE_CRT_SBJ ALERT_EE_CRT_BDY	Employee	The due date for sending a critical reminder to the employee about a step in his or her document is reached.
ALERT_EE_ONS_SBJ ALERT_EE_ONS_BDY	Employee	The due date for sending a courtesy reminder to the employee about a step in his or her document is reached.
ALERT_EE_WRN_SBJ ALERT_EE_WRN_BDY	Employee	The due date for sending a warning reminder to the employee about a step in his or her document is reached.
ALERT_MGR_CRT_SBJ ALERT_MGR_CRT_ BDY	Manager	The due date for sending a critical reminder to the manager about a step in his or her direct report's document is reached.
ALERT_MGR_ONS_SBJ ALERT_MGR_ONS_ BDY	Manager	The due date for sending a courtesy reminder to the manager about a step in his or her direct report's document is reached.
ALERT_MGR_WRN_ SBJ ALERT_MGR_WRN_ BDY	Manager	The due date for sending a warning reminder to the manager about a step in his or her direct report's document is reached.
ALERT_PRT_CRT_SBJ ALERT_PRT_CRT_BDY	Participant	The due date for sending a critical reminder to a participant about a step in his or her review document is reached.
ALERT_PRT_ONS_SBJ ALERT_PRT_ONS_BDY	Participant	The due date for sending a courtesy reminder to a participant about a step in his or her review document is reached.
ALERT_PRT_WRN_SBJ ALERT_MGRPRT_WRN _BDY	Participant	The due date for sending a warning reminder to a participant about a step in his or her review document is reached.

See Also Setting Up Due Date Notifications

Text Substitution for Automatic Document Transfer

ePerformance references the same list of tokens when creating text catalog entries for both documents and automatic document transfer email notifications.

Refer to the Text Substitution for Documents section for the list of tokens that are used in text catalog entries as subject lines and body messages for automatic document transfer email notifications.

See the Understanding Automatic Document Transfer topic for more information about the Automatic Document Transfer feature.

Delivered Email Text Entries for Automatic Document Transfer

This table lists the delivered text entries that ePerformance uses in system-generated email notifications for automatic document transfer. It specifies to whom and the condition when these notifications are generated and sent. Each delivered automatic document transfer notification template uses two entries, one with the suffix -SBJ as the subject line and a corresponding entry with the suffix -BDY as the body of email messages.

Text Catalog ID	Recipient	Condition for Creating
AUTO-XFER-SBJ AUTO-XFER-BDY	New Manager	One or more documents have been transferred to a new manager by an automatic transfer process.

Chapter 3

Setting Up Document Templates

Understanding Document Templates

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

- The roles that can participate in the review process.

- What activities each role can perform.

- The steps in the review process.

- The items that are evaluated.

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

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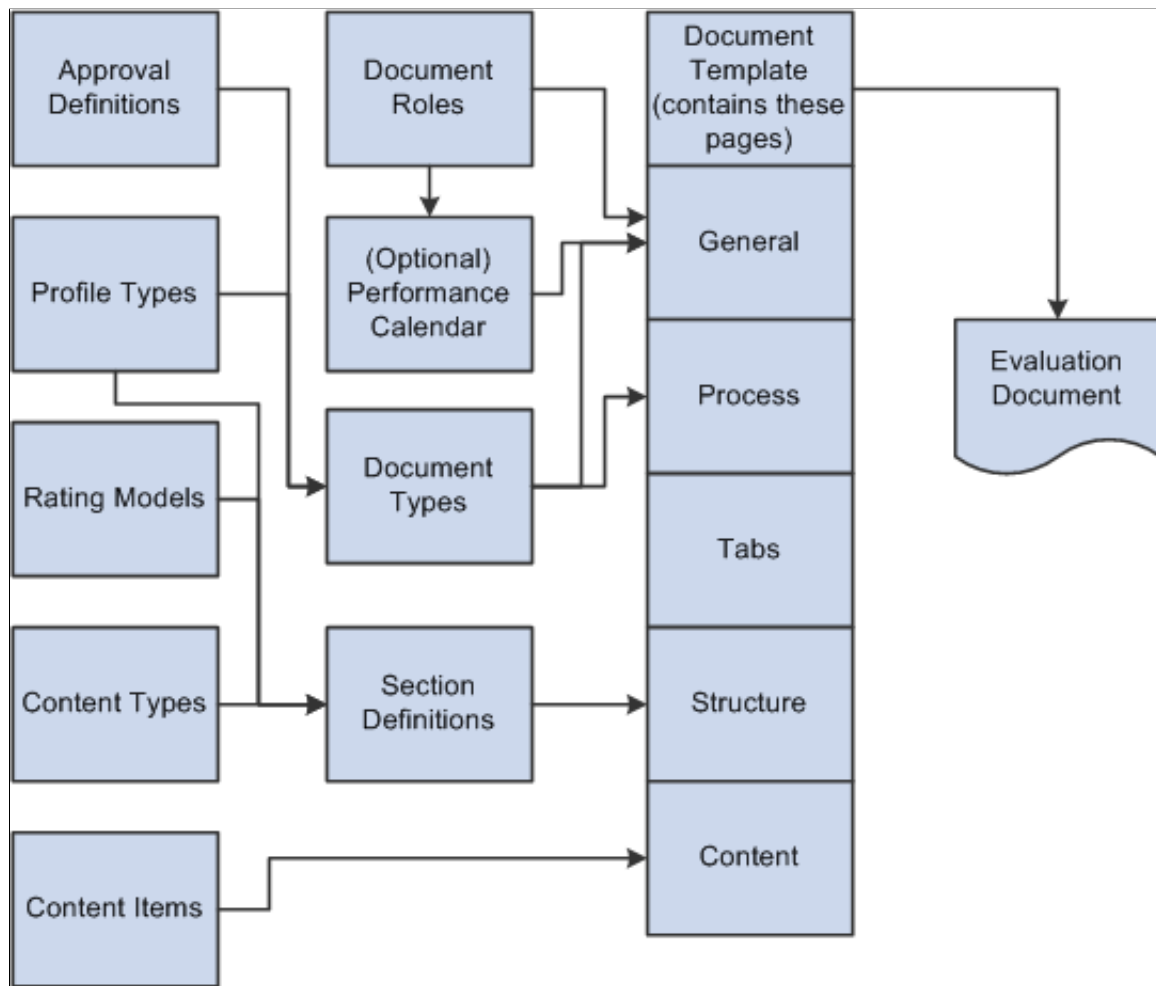
The decisions you make and the options you select when you define templates influence the way the evaluation process is conducted in an organization. Organizations often define a high-level template and then successively clone and modify this template for the appropriate levels of the organization. For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

Before defining templates, consider:

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

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

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

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

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

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

Understanding ePerformance and Career and Succession Planning Integration

The integration of ePerformance and Career and Succession Planning brings the performance management, Plan Careers and Plan Successions business processes closer together and provides improved user experience for managers and administrators who are involved in these processes. The solution enables managers who are working on employee evaluations to view employees' career plan data directly from the evaluation documents and edit the information with one simple click. From succession planning components, managers have easy access to employees' performance ratings and documents to help them make candidate recommendations and succession decisions. They can also view how candidates are compared against each other by performance and career potential ratings in ratings box charts.

[▶] New ePerformance Features in HCM 9.2

Display of Career Plan Summary in ePerformance Documents

ePerformance delivers a new section definition for career plan summary, which can be added to both performance and development document templates. At runtime, this section (called Career Plan Summary) displays high-level career planning data of an employee for the manager while he or she is working on the employee's review. The system displays the most current data based on the ePerformance period end date. For example, if the document end date is December 31, 2011, and two career plan effective dated rows are present in the system, one with the date of October 25, 2011 and the other July 8, 2012, data from the October 25, 2011 date row is displayed. This section also includes a link to access the Manage Career Plans component in Manager Self Service should the manager need to update this information. Changes are reflected in the

Career Plan Summary section in real time as the manager returns to the ePerformance document. Career plan summary is not available to employees who are working on their own documents.

See Defining Sections, Define Criteria Page.

Access to Performance Rating and Document in Succession Planning

The integration provides administrators and managers, who are working on employees' succession planning, easy access to performance ratings and document information of employees as well as their

succession candidates. From the Manage Succession Plans (for manager) and Maintain Succession Plans component (for administrator), they can view the most current overall performance rating of an employee and click the rating link to review the corresponding performance document in a modal window. In addition to individual employees, the same functionality is also extended to managing talent pool members using the Manage Talent Pools component.

Managers have access to the performance ratings and documents of their direct and indirect reports only.

See "Creating Succession Plans" (PeopleSoft HCM 9.2: Human Resources Plan Careers and Successions), "Succession Planning Self-Service" (PeopleSoft HCM 9.2: Human Resources Plan Careers and Successions).

Display of Performance and Career Potential Ratings in Ratings Box Charts

The Ratings Box functionality in Succession Planning is used to give a visual picture of how employees are rated against each other in a box rating chart. With the integration, administrators can set up ratings boxes to map to rating models used in performance documents and map the career potentials defined at the translate tables. When either type of rating is selected in an axis setup in the ratings box definition, a mapping page is available for administrators to map an axis rating (for example, High, Medium, and Low) defined in the definition to each of the rating values that exist in the selected rating integration (performance rating or career potential rating). The system delivers translate values for career potential ratings; for performance ratings, select a rating model for the mapping.

When either performance or career potential rating is selected in the rating box definition, the Auto Load Ratings option becomes available and is selected by default. When users access the rating box page and this option is enabled, the system displays the chart and pre-populates the Box Ratings grid with employee ratings used in the chart. If the option is disabled, the Box Rating chart appears without any data; users need to manually enter the ratings in the Box Ratings grid for the data to show up in the chart.

Suppose that the Auto Load Ratings option is enabled. To determine where an employee is displayed on a ratings box at runtime, the system first looks up the document type that is selected in the Document Type field on the Succession Planning Setup page. Then, it finds the most current, completed document (matching the document type in succession planning setup) for the employee based upon the succession plan's effective date, and captures the overall rating of that document. Using the information of the mapping page, the system is able to identify the corresponding axis rating that the employee is in and places the employee in the appropriate box in the chart. If the system cannot find the overall rating for the employee, the employee is not displayed in the ratings box chart.

See "Setting Up Succession Planning" (PeopleSoft HCM 9.2: Human Resources Plan Careers and Successions), "Succession Planning Self-Service" (PeopleSoft HCM 9.2: Human Resources Plan Careers and Successions).

Defining Document Types

To define document types, use the Document Types (EP_REVIEW_TYPE_TBL) component.

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

Page Used to Set Up Document Types

Page Name	Definition Name	Usage
Document Types Page	EP_REVIEW_TYPE_TBL	Define document types.

Understanding Document Types

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

Document types also define whether:

• The document is used as the official review for integration with the Salary Planning component.

• Employees, managers, or both can generate documents.

• The document can be cloned.

• The user or the profile type identifies the document template.

• An approval process is used during the review process.

Prerequisite for Setting Up Document Types

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

See "Understanding Profile Management" (PeopleSoft HCM 9.2: Human Resources Manage Profiles).

Document Types Page

Use the Document Types page (EP_REVIEW_TYPE_TBL) to define document types.

Navigation

Set Up HCM >Product Related >ePerformance >Document Structure >Document Types >Document Types

Image: Document Types page

This example illustrates the fields and controls on the Document Types page.

Official Review	Select this check box to designate that documents generated for this document type are used by the Salary Planning by Group process to retrieve rating and review points and, by the Salary Increase Matrix page to retrieve ratings.
	If an employee has more than one official document, these processes use the results of the document with the latest period ending date.
	This selection becomes the default value for the Official Document field on the Template Definition page.
Document Usage	Select the process that uses the document type. Valid options are:

• *Performance*

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

• *Development*

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

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

	Development documents appear under the My Development Documents menu on the self-service pages or under the Development Documents menu on the Manager Self-Service and Administrator pages.
Initiate Process	Select *Employee, Manager,* or both check boxes to indicate which role or roles can initiate the evaluation process. The value that is in this field determines if the manager or employee can select the document type when initiating the evaluation process.
Employee can Select Manager	The system enables this check box only if you select the Employee check box for the Initiate Process field.
	Select this check box to enable an employee to select the person who acts in the manager role during the evaluation process.
Clone Existing Document	Select *Employee, Manager,* or both check boxes to indicate which role or roles can clone an existing document to create a new document.
	The system enables the employee and manager check boxes only if you select the corresponding check box in the Initiate Process field.
	See Understanding Document Generation.
Template Source	Select the option that identifies where the system obtains the document template that will be used to generate documents. Values include:

- User Specified

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

- Profile Management

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

Profile Type	The system enables this field if you select the *Profile Management* option in the Template Source field.
	Select the profile type that is used by the Create Documents process to identify the document template. The list contains only nonperson profile types that have the ePerformance template association option included as a related object in the Profile Association Options group box on the Profile Types - Associations page.
Default Template	The system enables this field if you select theProfile Management option in the Template Source field. The Create Documents process uses the profile type and the employee's job data to determine the employee's nonperson profile and obtain the ePerformance template associated with that profile.

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

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

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

• *ManagerOnly*

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

• *ManagerToAdmin*

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

• *AdminOnly*

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

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

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

Related Links

<u>Understanding Review and Approval Processes</u>
<u>Understanding Document Templates</u>

Defining Roles

To define roles, use the Document Roles (EP_ROLE_TBL) component.

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

Page Used to Define Roles

Page Name	Definition Name	Usage
Participant Roles Page	EP_ROLE_TBL	Set up roles.

Understanding Roles

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

Participant Roles Page

Use the Participant Roles page (EP_ROLE_TBL) to set up roles.

Navigation

Set Up HCM > Product Related > ePerformance > Document Structure > Participant Roles > Participant Roles

Image: Participant Roles page

This example illustrates the fields and controls on the Participant Roles page.

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

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

Related Links

Understanding Document Templates

Defining Performance Calendars

This topic provides an overview of performance calendars and discusses how to define performance calendars.

Page Used to Define Performance Calendars

Page Name	Definition Name	Usage
Performance Calendar Page	EP_CALENDAR	Define performance calendars.

Understanding Performance Calendars

ePerformance provides two ways for setting up due dates for various steps in the evaluation process:

• By specifying the number of days before or after the period end date in the document template definition.

• By specifying the actual due dates using the Performance Calendar component.

Using the performance calendar, an administrator specify actual dates within the identified calendar period as due dates for criteria approval, checkpoints, finalizing criteria, participant nomination and evaluations in documents. With this mechanism, the administrator can easily control the actual day (such as a Friday) the due dates occur in each period.

To use the performance calendar option for populating document due dates, reference the calendar ID and calendar period ID in the document template definition.

See Creating Document Templates.

Performance Calendar Page

Use the Performance Calendar page (EP_CALENDAR) to define performance calendars.

Navigation

Set Up HCM >Product Related >ePerformance >Document Structure >Performance Calendar >Performance Calendar

Image: Performance Calendar page

This example illustrates the fields and controls on the Performance Calendar page.

Calendar ID	Enter an identifier of the performance calendar for up to eight alphanumeric characters. For example, Annual, Semi-year, Quarter and so on.
	A calendar ID can be associated with one or more rows, which are further identified by calendar period IDs.
Calendar Period ID	Enter a descriptive identifier of the period within the performance calendar.
	For example, if the calendar period is a 1-year duration starting on January 1 and ending on December 31, you can use the year (2012, 2013) as the calendar period ID.
	When entering new calendar periods, make sure that they do not overlap with existing ones.
Period Begin Date and **Period End Date**	Enter the start and end dates of the calendar period.
	The system uses the period begin and end dates of the calendar in the document creation process to determine which calendar period ID and due dates to use in the document.
Due Date Type	Select a type for the due date you want to define. Values are:
	Approve Criteria. If selected, the approve criteria due date must be on or before any other specified due dates.
	Checkpoint Due. If due dates for all checkpoints are selected, then you must also specify the *Finalize Criteria* due date,

which must be after the last checkpoint due date. The due dates of checkpoints need to be in chronological order just like the checkpoint sequence. In other words, the checkpoint 01 due date must be before the checkpoint 02 due date, the checkpoint 02 due date before the checkpoint 03 due date, and so on.

Finalize Criteria. If selected, the finalize criteria due date must be on or before the nomination and evaluation due dates.

Nomination Due.

Evaluation Due.

Checkpoint Sequence	Select the checkpoint to which the corresponding checkpoint due date applies.
	This field becomes editable when *Checkpoint Due* is selected as the due date type. Values are *Checkpoint 01* through *Checkpoint 11*, which allows you to set up one checkpoint for each month in a year. The last month of the year will be used for final evaluation.
Evaluation Role	Select the role to which the corresponding evaluation due date applies.
	This field becomes editable when *Evaluation Due* is selected as the due date type. Values are active participant roles from the Participant Roles table.

Defining Sections

To create document sections, use the Section Definition (EP_SECTION_DEFN) component.

This topic provides an overview of document sections and discusses how to define them for use in document templates.

Pages Used to Create Section Definitions

Page Name	*Definition Name*	*Usage*
Section Definition Page	EP_SECTION_DEFN	Define sections.
Define Content Group Page	EP_CONTENT_SEC	Select both a content group type and a content group.

Understanding Document Sections

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

- The organization's mission statement.

- The department's initiative for meeting the mission statement.

- The employee's goals.

- The employee's competencies, responsibilities, or learning.

- A section for employee's to add comments.

- A section for manager's to add comments.

- A section for signatures.

Each of these are separate section definitions that can be added to the document template.

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

This diagram illustrates the relationship between sections, templates, and generated documents.
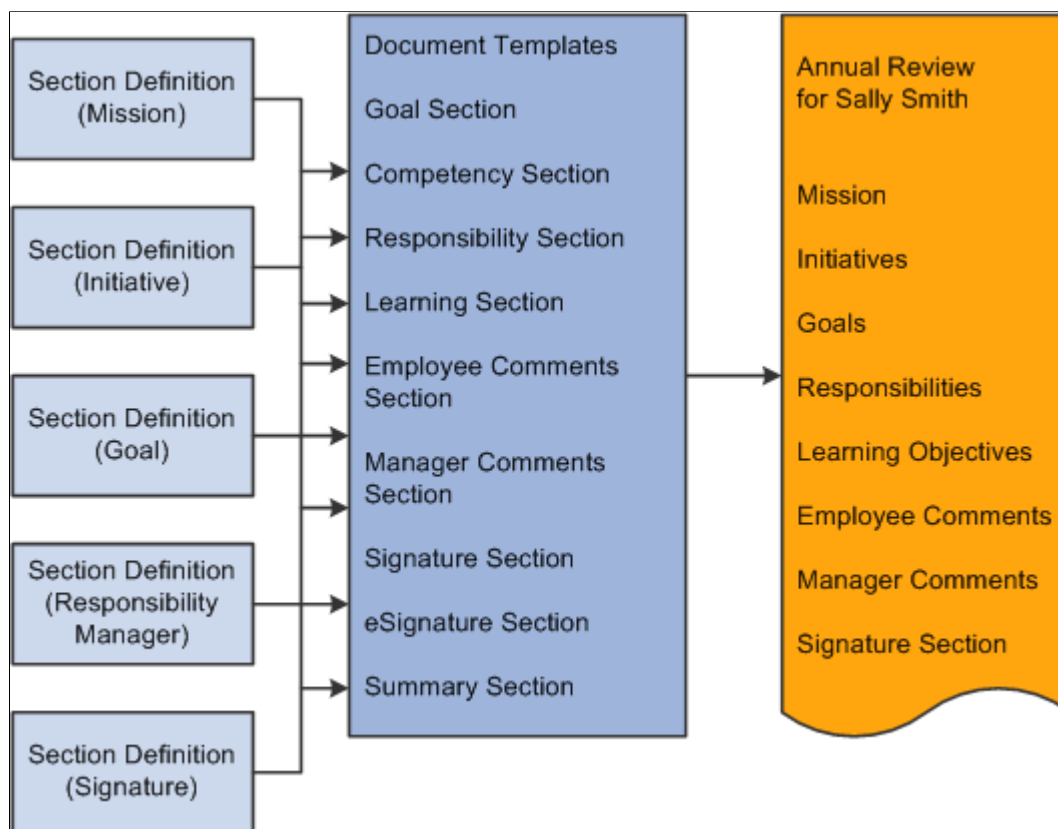
When you define sections, you specify:

- Whether the section is rated or weighted.

- Which calculation method to use to determine employee ratings.

- Which rating model to use to rate employees.

- Any special processing for that section.

- What category of content types are associated with the section.

- What information to include in the document.

ePerformance delivers the following section definitions:

- Career plan summary

- Competency (competency)

- Employee (employee comments)

- Goals

- Init (initiatives)

- Learning

- Manager (manager comments)

- Mission

- Resp (responsibility)

- Sign (signature)

- eSignature

    This section is used to electronically record the date and time that the employee acknowledges the document as well as the date and time that the manager finalizes the document. The section appears only on the printed version of documents that have it enabled at the template level.

    See Also <u>Manager and Employee Signatures for the eSignature Section</u>

- Summary (overall summary)

Ratings and Weighting

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

Calculation Methods

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

- *Average*

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

- *Summation*

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

•   *Review Band*

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

Special Processing

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

If Special Processing is	*Then the section*
Business Objectives	Can be connected to a section on a business objective page to allow objectives to be aligned and copied between the two.
Career Planning Summary	Cannot be rated or weighted Cannot have items or subitems.
Employee Comments	Cannot be rated or weighted. Cannot have items or subitems.
Learning	Can be rated and weighted. Cannot have items or subitems.
Manager Comments	Cannot be rated or weighted. Cannot have items or subitems.
None	Can be rated and weighted. Can have items and subitems.
Overall Summary	Can be rated and weighted. Cannot have items or subitems.

If Special Processing is	*Then the section*
Signatures	Cannot be rated or weighted.
	Cannot have items or subitems.
eSignatures	Records the date and time that the employee acknowledged the review.
	Records the date and time that the manager finalized the review.
	See Also Manager and Employee Signatures for the eSignature Section

Prerequisites for Creating Section Definitions

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

1. Define rating models.

2. Define content types.

3. (Optional) Define profile types.

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

Section Definition Page

Use the Section Definition page (EP_SECTION_DEFN) to define sections.

Navigation

Set Up HCM >Product Related >ePerformance >Document Structure >Section Definition >Section Definition

Image: Section Definition page (1 of 2)

This example illustrates the fields and controls on the Section Definition page (1 of 2).

Image: Section Definition page (2 of 2)

This example illustrates the fields and controls on the Section Definition page (2 of 2).

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

Section

Rate

Select this check box to enable a rating assignment for the section, either by a system calculation or manually. A rating field appears in the section summary of each document created based on a template that includes this section. When the Rate check box is selected, a section summary rating must be specified (either by a system calculation or manually) in order to submit documents for approval.

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

Calculation Method

Select the calculation method used for the section. Values include:

- *Average*

- *Summation*

- *Review Band*

The system enables this field if the Rate check box is selected and the Special Processing field is set to *Learning, None,* or *Overall Section.*

Preliminary Rating

Select this check box to enable a manager to enter a preliminary rating for the performance document.

The system enables this check box if the Rate check box is selected and the Special Processing field is set to *Overall Summary.*

Rating Model

Select the default rating model for the section.

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

Rating Display

Select how values of the selected rating model are displayed on documents. Options are *Drop-Down Box* and *Radio Buttons*.

Important! Always use the Drop-Down Box option if the selected rating model has more than 10 rating values.

Weight

Select this check box to enable the section to have a weighting relative to the other sections in the document. A Weight Section field appears in the section summary.

The system enables this check box if the Rate check box is selected and the Special Processing field is set to *Learning* or *None.*

You cannot weight sections of a performance document when you select a calculation method of *Summation* or *Review Band*

for the Overall Summary section and you elect to have the system calculate performance ratings. (You enter calculation instructions through the Template Definition component.)

Rating Display

Select one of these values to indicate how you want the system to display the rating options:

- *Drop-Down Box*

- *Radio Buttons*

Minimum Weight

Enter the minimum weight for the section. This field is used when ratings are calculated to ensure that the section weight cannot fall below a minimum value.

The system enables this check box if the Weight check box is selected.

Weight

Enter the default weight for a section. The system enables this check box if the Weight check box is selected.

Special Processing

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

- *Business Objectives* – Select this option if you want this section to be connected to a business objective page to allow business objectives to be aligned and copied to a performance document.

- *Career Plan Summary* – Select this option to allow managers to view employee's career planning information. Information available in this section is read-only, and managers can click the Update Employee Career Plan link to transfer to Manager Self Service and edit employees' career planning data. For the Roles Rules sections that appear at the bottom of the section definition, only the *Manager* role is available for selection.

- *Employee Comments* – Select this option if this section is used by employees to enter and edit comments on the manager's performance evaluation when the evaluation status is *Shared with Employee, Pending Acknowledgement,* or *Acknowledged.*

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

  When selected, all fields on this page become unavailable.

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

> **Note:** The Oracle Business Intelligent Publisher (BI Publisher) report includes the Learning section.

- *Manager Comments* – Select this option if this section is used by managers to enter comments, in response to the employee's comments, on the performance evaluation when the evaluation status is *Evaluation in Progress, Shared with Employee, Pending Acknowledgement,* or *Acknowledged.* When selected, all fields on this page become unavailable.

- *None* – Select this option if no special processing options apply. Most likely, you'll select this option when creating a section for a mission statement, initiatives, goals and objectives, competencies, or responsibilities.

- *Overall Summary* – Select this option if this section contains the overall rating for the document. A document template can include only one section that is set to *Overall Summary.* When selected, all fields on this page except the Rate Section and Summary fields become unavailable.

- *Signatures* – Select this option if a predefined signature section appears on the printed version of the evaluation. This section consists of two signature rows: the first for the employee, the second for the manager. Each row includes a signature line and a date. To change the format of the signature lines in this section, modify the Text Catalog feature.

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

  > **Note:** The Text Catalog entry for defining the signature format is APPR_MAIN1_INST2 for evaluations and APPR_BASE_SEC_DESC for the Establish Criteria document. The section type context key for both equals SIGN.

- *eSignatures* – Select this option if you want the system to record the date and time that the employee acknowledged the review and the date and time that the manager finalized the review. When a document is viewed or printed using Oracle Business Intelligence Publisher (BI Publisher) , the system displays the eSignature section with the employees name printed on the employee signature line along with the date and time the employee acknowledged the document. In addition the manager's name is printed on the manager signature line with the date and time the manager completed the document. The timing of the manager's signature is dependent upon the review process selected on the template definition of the document.

See Also Manager and Employee Signatures for the eSignature Section

Items

Fields that are displayed in this group box determine if the section on the document can contain content items such as mission statements, initiatives, goals or objectives, competencies, responsibilities, or free-form items. A section must contain all items of the same content type. Items are evaluated or tracked depending on the rules that you specify. Typically, Employee Comments, Manager Comments, Overall Summary and Signatures sections do not include content items.

The Items group box (the Enable Items check box specifically) becomes editable if the Special Processing field is set to *Business Objectives* or *None*.

Enable Items	Select this check box to allow the section to contain items. Most fields in the Items section become editable when you select this field.
	The system displays the items you select on the Establish Criteria and Document pages, on the Template Definition - Content page, and on Performance or Development documents.
	Note: If you select the Critical check box, all check boxes and fields within the items group box will have a critical indicator.
Content Type	Select the content type from which content items (job attributes) are pulled when defining the criteria used to evaluate employee performance on the Template Definition - Content page. Valid options are any content types defined in the content catalog in the Manage Profiles business process. This field cannot be a content type that is defined only as a child of another content type.
Free-Form Allowed	Select to enable users to add free-form items to this section of a document or template. For example, managers might use this feature to add a list of courses that an employee should take. The system assigns an item sequence ID to each free-form item that is added. These items are not stored for reuse.
Define Content Group	Click this link to access the Define Content Group page (EP_CONTENT_SEC) where you can select both a content group type and a content group. Selecting a content group type and content group determine what sections will appear on the Template Definition page. This information is set up in the content catalog.
	See "Understanding the Content Catalog" (PeopleSoft HCM 9.2: Human Resources Manage Profiles).
Rate	Select this check box to enable a rating assignment for each section item. The Rating Model field appears on the Template Definition - Content page, and a rating field appears for each

section item in each document created based on a template that includes this section. When the Rate check box is selected, a section item rating must be specified in order to submit documents for approval.

The Mandatory option does not control the behavior of the Rate option.

Prompt Table	Select the name of the table that holds the content items that you want included in the section.
Use Section Rating Model	Select this check box to have the rating model for all items and subitems on the document template default to the section rating model.
	The system enables this check box if a rating model is entered in the Rating Model field in the Section group box.
Weight	Select this check box to enable the item in the section to have a weighting relative to the other items in the section. A weight section field appears in the section summary.
	You cannot weight sections of a performance document when you select a calculation method of *Summation* or *Review Band* for the Overall Summary section and you elect to have the system calculate performance ratings. (You enter calculation instructions through the Template Definition component.)
	The system enables this check box if the Rate check box is selected.
Target Rating	Select this check box to indicate that content items can have a target proficiency rating assigned on the Template Definition - Content page. The target proficiency rating displays on the performance document for the content items. The system enables this check box if the Rate check box is also selected.

Note: The target rating is used with the learning integration feature. If the employee doesn't make his or her target rating, the system sends the person's performance rating to ELM. ELM will then do a fit gap analysis, suggest a learning for the employee, and add a learning course to the learning grid.

Mandatory	Select this check box if the document author cannot edit or delete items. This applies to all items, regardless of whether they are defined on the template or job profile.
Minimum Weight	Select this check box if items can have a minimum weighting. Minimum weights are entered on the Template Definition - Structure page.
	During the evaluation process, managers can click an update link on the evaluation to edit the minimum weight.

Description   Select this check box to display the Description field on the
                                        Template Definition - Content page and on the Performance
                                        or Development Document. When an item from the Content
                                        Catalog is added, the system displays the description associated
                                        with that item and it cannot be edited. If the item is manually
                                        added, you can edit the Description field unless the item is
                                        marked as mandatory on the Template Definition - Content
                                        page.

Critical   Select this check box to indicate that all check boxes and fields
                                        within the items group box can have a critical indicator.

Due Date   Select this check box to have items include a due date on the
                                        document. For example, managers might enter a due date
                                        by which an employee must become proficient in a certain
                                        competency or attain a particular goal. During the evaluation
                                        process, managers can update the due date.

Measures   Measurements describe the standards against which
                                        performance is compared. When an item from the Content
                                        Catalog is added, the system displays the measurement
                                        associated with that item and it cannot be edited. If the item is
                                        manually added, you can edit the Measurement field.

Ownership   Select this check box to have items contain the Owner field,
                                        which indicates who is responsible for the item: the employee
                                        or the manager. The flag is informational only; it does not cause
                                        any special processing to occur. During the evaluation process,
                                        managers can click an update link on the evaluation to edit the
                                        Owner field.

Reminder Date   Select this check box if items can contain a reminder date on the
                                        document. During the evaluation process, managers can click an
                                        update link on the evaluation to edit the reminder date.

Percentage Completed   Select this check box if items on a document can include a field
                                        for entry of the percentage complete. Employees and managers
                                        can use this field to indicate progress towards certain goals.

Stretch Goal   Select this check box to allow items on a document to be
                                        flagged as being a stretch goal. This field is for informational
                                        purposes only.

Level Of Difficulty   Select this check box to display the Level Of Difficulty field.
                                        The Level of Difficulty field includes *Basic, Intermediate* and
                                        Advanced as its values. You can associate these values with the
                                        difficulty of an item. When an item from the Content Catalog is
                                        added, this field displays the level of difficulty associated with
                                        that item and you cannot edit the values. If the item is manually
                                        added, you can select the level of difficulty unless the item is
                                        marked mandatory on the Template Definition - Content page.

Align Items and **Links To**   If you select *Business Objectives* in the Special Processing field,
                                        the system displays the Align Items and Links To fields.

	Select the Align Items check box to align items in this section with business objectives. This field works in conjunction with the Links To field.
	Select *Any Section* in the Links To drop down list box. On the performance document the system enables a user to associate a business objective to a specific item and displays the Alignment Chain icon, which a user can click to view how the objective they selected aligns with other higher level objectives. The system only enables this check box if the Align Items check box is selected.
Supports and **Link**	If you do not select *Business Objectives* in the Special Processing field, the system displays the Supports and Link fields.
	Select the Supports check box to enable the association of items in this section with items in a different section of the same review. This field works in conjunction with the Link field.
	Similar to cascading objectives, the Link option enables you to indicate that the current section supports another section. This association displays an informational message on the performance document. The system enables this check box if the Supports check box is selected.
Status and **User Defined Value**	Select this check box to have items in the section of a document include a field that identifies the status of the item. Possible statuses are *Complete, In Progress,* and *N/A* (Not Applicable).
	The values that are available for selection in the User Defined Value field are defined on the "Custom Prompt Page" (PeopleSoft HCM 9.2: Human Resources Manage Profiles).
Empl Measures (employee measures)	Select this check box if you want the system to display an Employee Measurement field for the section. An employee or manager can use this field to describe how the item they are defining should be measured.
Private - hide from employees	Select this check box if you do not want employees or other managers to view information in this section.
	When a user is adding an item to their performance document and selects the Copy from Manager's Document option, the system does not display the item.
Start Date	Select this check box if you want to enable managers or employees to set start dates for the items they are defining in this section.
End Date	Select this check box if you want to enable managers or employees to se end dates for the items they are defining in this section.

Sub-Items

The system enables fields in this group if the Enable Items check box in the Items group box is selected.

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

Profile Management

Use this group box to enable the system to automatically populate relevant content items in the section when new documents are created for employees.

Initialize from Profile	Select this check box if you want relevant competencies or responsibilities that are associated with a specified profile type (through profiles) to be automatically loaded from a profile into documents that are created for employees.
	This check box becomes editable if the Enable Items check box in the Items group box is selected and a content type is specified in the system.
Profile Type	Select the profile type to be used to identify the profiles of the content items to be populated. These profile types are defined in the Manage Profiles business process.
	The system enables this field if you select the Initialize from Profile check box. A role can be tied to person profile in the Evaluation Role Rules grid.

Here is an example of how the system determines which content items to populate to a performance document for an employee in the document creation process.

Suppose that the Initialize from Profile option is enabled for the Competencies section and you have specified *Job* as the profile type. At runtime, when a user creates a performance document using a template that includes the Competencies section, the system:

1. Identifies the profile type (Job) that is specified in the Profile Type field for the section, and locate all profile identity options that are associated with that profile type.

    Image: Profile Types - Identities page

    This example illustrates the fields and controls on the Profile Types - Identities page.
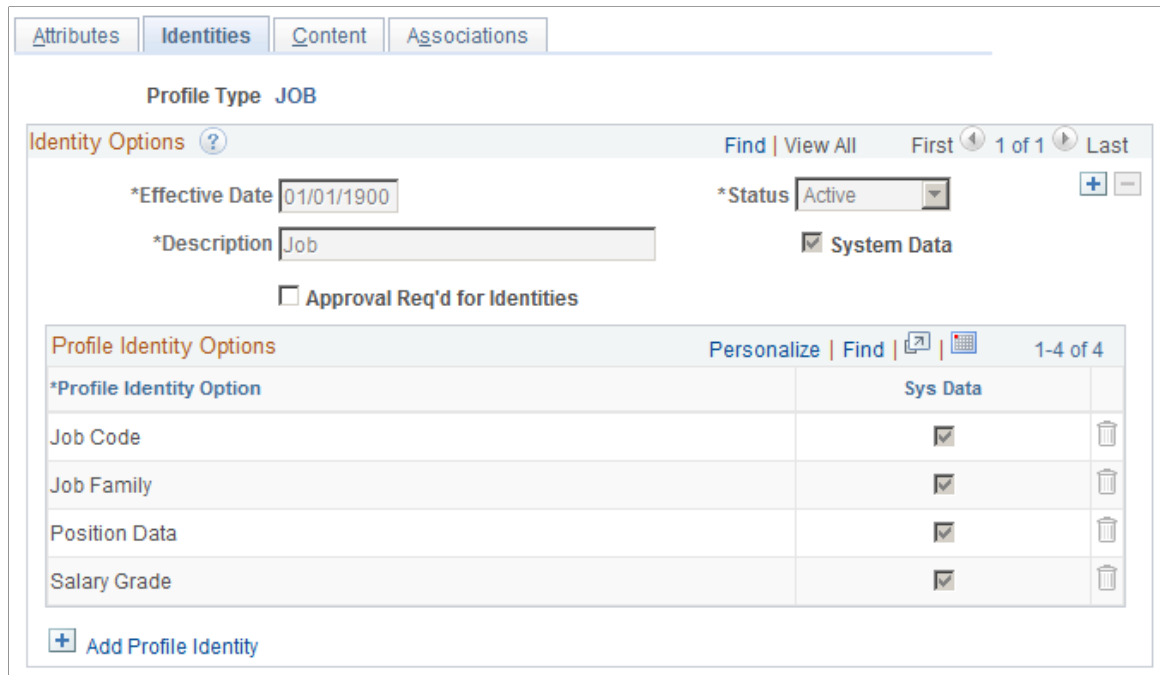
2. Identifies, for each profile identity option, key values that are specified for all of the profiles.

Image: Non-person Profile page

This example illustrates the fields and controls on the Non-person Profile page.
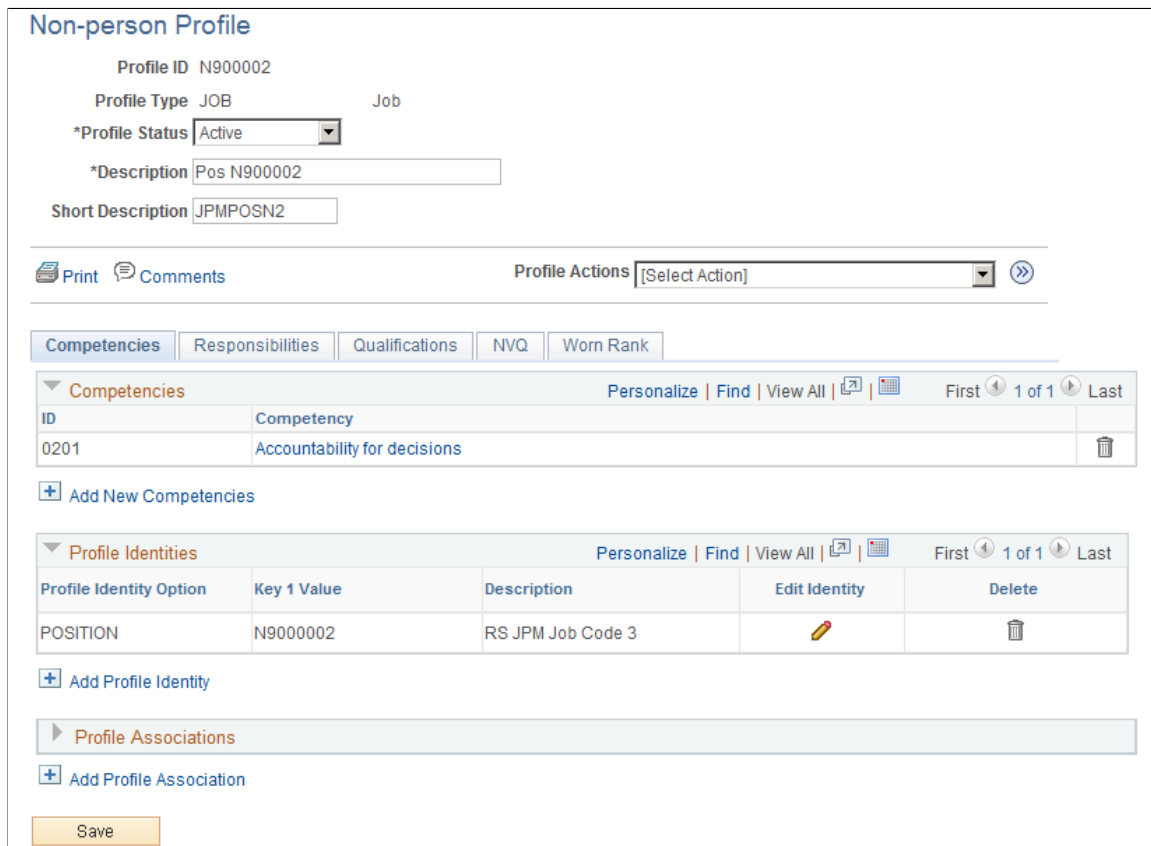
3. Orders these profile identity options according to the order sequence that is specified on the "Profile Identity Options Page" (PeopleSoft HCM 9.2: Human Resources Manage Profiles).

    For example, 20 - *POSITION*, 30 - *JOB_CODE*, 40 - *JOB_FAMILY*, and so on.

4. Retrieves the job information record of the document's employee.

    With that, the system takes the first profile identity option (for example, 20 - POSITION) and sees if there is a match between the employee's job record and any of the profiles identified.

    a. If there is a match (which means that the employee's position data is present and it matches a key value of an identified profile that has the POSITION profile identity option, the system loads the content items (competencies or responsibilities, based on the specified content type in the section definition) in the section of the document to be created.

    b. If no match is found, the system takes the second profile identify option (for example, 30 - JOB_CODE) and looks for a match.

    c. If the system goes through all the profile identity options of the profiles and is unable to find a match, it stops and no content items will be loaded to the document.

As soon as the system identifies one profile from which it can load content items, it stops the process and does not look for any other profile to load additional content items.

Define Content Group Page

Use the Define Content Group page (EP_CONTENT_SEC) to select both a content group type and a content group.

Navigation

Click the Define Content Group link on the Section Definition page.

Image: Define Content Group page

This example illustrates the fields and controls on the Define Content Group page.
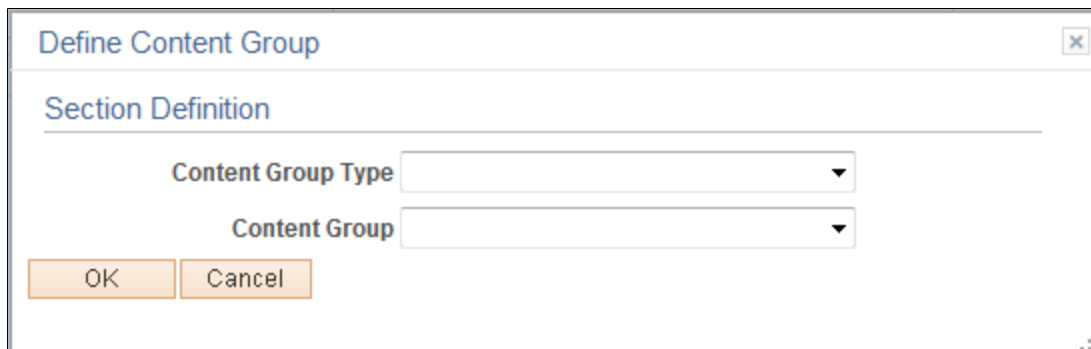
Select the content group type and content group. The content group type and content group determine what sections will appear on the Template Definition page. This information is set up in the content catalog.

(JPN) Creating Review Identifiers

To create review identifiers, use the Review Definition table JPN (REV_DEF_TBL_JPN) component.

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

Page Used to Create Review Identifiers

Page Name	Definition Name	Usage
Define Review JPN Page	REV_DEF_TBL_JPN	Define reviews.

Understanding Review Identifiers

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

When you create a document template, you can designate that the documents generated from the template are used for official reviews. This is required if you want to use the Manage Base Compensation and

Budgeting business process. Pages in this business process locate employee review results by locating the document ID that is linked to the template that was used to create the employee review document.

Related Links

<u>Understanding Document Templates</u>

Define Review JPN Page

Use the Define Review JPN page (REV_DEF_TBL_JPN) to define reviews.

Navigation

Set Up HCM > Product Related > ePerformance > Define Review JPN > Define Review JPN

Image: Define Review JPN page

This example illustrates the fields and controls on the Define Review JPN page.

Use this page to define reviews, which include performance period, document type, and inclusion of the review when determining eligibility for grade advances.

Period Begin Date and **Period End Date**	Enter the first and last dates of the performance period. This information is informational only.
	See <u>Template Definition - General Page</u>.
Document Type	Select the document type that is valid for the selected setID.
Include in Grade Advance	Select this check box to include this review when you run the JPN Grade Advance Candidate (PER062JP) SQR report.
	To run the JPN Grade Advance Candidate report, you define the criteria employees must meet before they are eligible for a grade advancement, including the number of eligibility points they must earn on evaluations.
	For example, you can have the system take an average or weighted average of the eligibility points for the employee's last three evaluations. When you run the Grade Advance Candidate process, the system looks at the number of eligibility points

the employee earned on this and other designated or applicable evaluations.

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

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

Related Links

"(JPN) Setting Grade Advance Criteria" (PeopleSoft HCM 9.2: Human Resources Manage Base Compensation and Budgeting)

Creating Document Templates

To create document templates, use the Template Definition (EP_TMPL_DEFN) component.

This topic provides an overview of document template setup, prerequisites, and discusses how to create document templates.

Pages Used to Create Document Templates

Page Name	Definition Name	Usage
Template Definition - General Page	EP_TMPL_DEFN1	Define general template information. The information that you specify on this page controls the sections that are available on other pages of the component.
Template Definition - Process Page	EP_TMPL_DEFN2	Define document processes. The information that you specify here determines the functions that employees, managers, and other participants can perform in each step of the review process.
Template Definition - Tabs Page	EP_TAB_DTL	Define tab labels and display order for use, if the performance documents are configured to display in tabbed format.
Template Definition - Structure Page	EP_TMPL_DEFN3	Define document structure, add appropriate sections to the template, define override default section settings, and define the way each role interacts with the document section.
Template Definition - Content Page	EP_TMPL_DEFN4	Add criteria to sections.

Page Name	Definition Name	Usage
Load Content From Profile Page	EP_TMPL_DEFN5	Load content from profiles. Profiles can be used to load criteria into sections.
Clone Template Definition Page	EP_CLONE_TMPL	Clone templates.

Understanding Document Template Setup

Document templates are defined using these pages:

- General

- Process

- Tabs

- Structure

- Content

General Page

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

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

By selecting Define Criteria, you activate the Define Criteria step in the business process. It appears as the first step to be completed in the evaluation. The system also creates a document for the step, which allows the manager, employee or both to update and possibly add items to the criteria definition step.

By selecting Track Progress, you activate two or more steps in the business process. Depending on the setup on the Process page, one or more Checkpoint <number> steps appear on the Steps and Tasks pagelet on the left, followed by the Finalize Criteria step. The system creates corresponding documents for the manager and employee to enter comments against the items and share comments with each other. The manager can also complete checkpoints (shared discussion on the employee's progress) and save progress copies.

By selecting Nominate Participants, you activate another group of steps in the business process. Nominate Participants and Review Participant Evaluations appear as steps on the Steps and Tasks pagelet. The system also creates corresponding documents for each person that accepts their nomination.

On this page, you also specify the method used to determine various document due dates to be displayed when a document is created.

If all business processes are enabled, corresponding steps appear in this order:

1. Define Criteria

2. Checkpoint <1–11>

3. Finalize Criteria

4. Nominate Participants

5. Review Participant Evaluations

6. Complete (or Review) Self Evaluation

7. Complete (or Review) Manager Evaluation

See Template Definition - General Page.

Process Page

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

•   Whether the ratings that are entered by persons having that role are anonymous.

•   Approval rules for the manager's document.

•   Overall document processing rules.

•   Due dates for steps.

See Template Definition - Process Page.

Tabs page

The Tabs page sets up the tabs to be used in displaying the document, if the document is configured to be shown in the tabbed format. Each tab in the document contains one or more sections defined in the Structure page. For example, you can set up the template to display a Goals tab that contains the Goals Section, and a Competencies tab that contains the Core Competencies section and the Job Competencies section.

See Template Definition - Tabs Page.

Structure Page

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

For each section that you include in the document, you select the tab that the section is listed under (if tabs format is enabled on the General page) and indicate if the section should be included in the Define Criteria and Track Progress documents.

You can set up how the document roles interact with that section, the actions that different roles can perform, the content that is visible to managers and employees, and the writing tools that managers and employees can use to enter ratings and comments.

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

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

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

Calculation Method for Overall Summary Section	Calculation Methods Allowed for Other Sections	Section Weighting Allowed?	Rating Calculations
Summation	Average and Summation You must define review points in addition to numeric ratings for these sections. The system converts section ratings to review points to determine the overall rating.	No	To determine section ratings, for sections other than the Overall Summary section, the system determines the rating and corresponding review points for each item in the section. Only items with review points are considered. It sums the points to determine the total points for the section. To determine overall ratings, the system determines the calculation method for the other sections. If the section rating is calculated using the average method, the system converts the section rating to the appropriate number of review points entered for that section, using the rating model associated with the section. If the section rating is calculated using the summation method, the total review points for the section are used as the section points. The points from each section are summed and converted to a document rating using the from and to point range on the rating model that is used for the Overall Summary section.
Review Band	Average and Summation You must define review points in addition to numeric ratings for these sections. The system converts section ratings to review points to determine the overall rating.	No	The review band is only available for the Overall Summary section. To use this method, the rating model that is associated with the Overall Summary section must include a performance document band and define review points as well as point ranges (from points and to points). The system uses the points in its calculations and: 1. Calculates the overall points by following the same steps as the summation method. 2. Converts the overall points into the appropriate review band according to the rules you define on the Rating Model page.

See <u>Defining Sections</u>, <u>Template Definition - Structure Page</u>.

Content Page

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

Criteria on the Content page can come from three sources:

• Content Catalog

Items and sub-items from the Content Items Detail (JPM_CAT_ITEMS) table. The system adds the Content Type field to the Load Content From Profile (EP_TMPL_DEFN5) page to narrow down the search.

Note: You can define unique coded categories of performance criteria. To do so, use Application Designer to create tables that store the items for the new criteria type. The tables that you create are then referenced as prompt tables in document templates and evaluations. Include the following fields in the table that you define: EP_ITEM_ID (key), EP_TITLE, EFFDT (optional key), EFF_STATUS (optional), EP_DESCR254 (optional)

- Free-Form Items

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

- Download from the nonperson profile.

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

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

See Template Definition - Content Page.

Prerequisites for Creating Document Templates

Before you create templates, complete the following tasks:

- Set up the content catalog.

- (Optional) Define job profiles.

- Set up rating models.

- Define document types.

- Define document roles.

- (Optional) Define performance calendars.

- Define section definitions.

- (JPN) Create review identifiers.

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

See "Understanding the Content Catalog" (PeopleSoft HCM 9.2: Human Resources Manage Profiles).

See "Understanding Profile Comparisons" (PeopleSoft HCM 9.2: Human Resources Manage Profiles).

See Defining Document Types.

See <u>Defining Roles</u>.

See <u>Defining Performance Calendars</u>.

Template Definition - General Page

Use the Template Definition - General page (EP_TMPL_DEFN1) to define general template information.

The information that you specify on this page controls the sections that are available on other pages of the component.

Navigation

- (Fluid) Select the Talent Administrator home page and click the Performance Administration tile. On the left navigation, select Documents >Template Definition.

- (Classic) Set Up HCM > Product Related > ePerformance > Document Structure > Template Definition > Template Definition - General

Image: Template Definition - General page

This example illustrates the fields and controls on the Template Definition - General page.

Description	Enter a description of the document template.
	This description appears as a selection field when users create evaluations from the template. Therefore, each template within a document type should have a unique description.
Display Type	Select how the document should be displayed. Values are:

Long Format Only: (default value) Document is displayed as one long document in sections and users need to scroll down to view the last section of the document.

Tabs Format Only: Document is displayed in sections as represented by tabs.

Toggle - Default Long: Document is displayed in long format by default and users can toggle between long and tabbed format.

Toggle - Default Tabs: Document is displayed in tabbed format by default and users can toggle between long and tabbed format.

Note: If the selected display type is not *Long Format Only,* make sure to define tabs for use (when users select to display documents in a tabbed format) on the Tabs page, and then specify a tab label for each section of the document on the Structure page.

Official Review

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

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

Language Checker

Select this check box to enable the use of the Language Checker tool when entering comments, for example, in the enabled Track Progress business process. Users can click a button on the document to have the system check for inappropriate language in the Comments and Results text boxes on the evaluation.

Concatenate Page Title

Select for the document page title to show both the step as well as the action to be performed for the step.

For example, if the user is at the Define Criteria step and is supposed to update criteria on the page, the page title reads *Define Criteria - Update* if this option is selected.

If this option is not selected, the page title reads *Define Criteria* instead.

Business Process

Use this section to define, in addition to the evaluation steps (automatically included for manager and configurable for employee), additional business process steps to generate when this template is used to create performance documents. For each step selected here, the system displays a corresponding group box on the Process page where you can enter data to define the specifics of the step.

Define Criteria

Select to enable the Define Criteria step, which allows users to add goals and other content to the performance review.

When you select this check box, the system displays:

- The Define Criteria Steps group box on the Process page.

- The Include in Define Criteria option on the Structure page.

- The Define Criteria Step – Role Rules grid on the Structure page, if the Include in Define Criteria option is enabled.

- The Define Criteria step on the left-hand navigation of the performance document

Track Progress   Select to enable the Track Progress step, where mid-period checkpoints can be created and criteria finalized.

When you select this check box, the system displays:

- The Track Progress Steps group box on the Process page.

- The Include in Track Progress option on the Structure page.

- The Track Progress Step – Role Rules grid on the Structure page, if the Include in Track Progress option is enabled.

- One or more Checkpoint <#> steps on the left-hand navigation of the performance document.

Select to support mid-period checkpoints and finalizing the criteria.

Nominate Participants   Select to enable the Nominate Participants step, which provides 360 degree feedback functionality.

When you select this check box, the system displays the Nominate Participants and Review Participant Feedback group boxes on the Process page.

See Template Definition - Process Page and Template Definition - Structure Page to configure the business processes that are enabled in this section.

Document Due Date Method

Use this section to select the method used to determine due dates for various steps in the performance process. To use the Performance Calendar method, a performance calendar must exist for each performance period, and you must specify the Calendar ID and Calendar Period ID to use. The system uses the Calendar ID and Calendar Period ID that you selected to display the due dates in the due date fields on the Document Structure, General and Process pages. If you select the Template Setup method, then you must enter the number of days before or after the period end date for each due date on the Document Structure, General and Process pages.

Due Date Method   Select the method used to calculate document due dates. Values are:

Performance Calendar: Use the performance calendar defined in the system to determine the due dates when a document

is created. Before selecting this option, make sure that a performance calendar already exists.

Template Setup: Use the Document Due Days and Period Type fields specified by role to determine the due dates when a document is created.

Calender ID and **Calendar Period ID**   Enter the ID of a calendar and calendar period, if *Performance Calendar* is selected as the due date calculation method.

When the calendar period ID is specified, the system populates potential due dates in the Calendar Period Due Date field in the Evaluations grid on this page, as well as the due dates that are displayed on the Process page.

See Defining Performance Calendars.

Evaluations - Participants

Role   Select one or more roles that can participate in evaluations that are generated using this document template.

The manager and employee roles always appear in this list. You can add additional roles that you defined on the Roles page.

Evaluation   Select this check box to have the system create an evaluation for the role. For example, if this option is enabled for the employee role, the step for self evaluation becomes available on the Steps and Tasks pagelet. The check box for the manager role is always selected and cannot be altered, because the system uses the manager evaluation as the central repository in which all the inputs and comments inserted for a review are captured and tracked. In other words, manager evaluation is a required step for all reviews.

Allow Document Download   Select to provide users of the corresponding role the ability to download documents locally and edit them offline.

When a document is created from this document template, an icon becomes available on the document for users to view and download the document in rich text format (RTF).

Calendar Period Due Date   Displays the evaluation due dates by role that are calculated using the calendar information entered in the Document Due Date Method group box.

This field appears if the *Performance Calendar* is selected in the Due Date Method field.

Document Due Days   Enter the number of days that the document is due before or after the period end date. This field appears if the *Template Setup* is selected in the Due Date Method field.

Documents always pertain to a specific period of time, defined by the period begin and period end dates. These dates are established when the document is created.

The document due date appears on the Employee Performance pagelet that managers can use to monitor pending performance documents (if you have PeopleSoft Applications Portal).

The due date is also used to generate the Late Reviews (EP_LATE_APPR) report and to run the Create Summary Data (EP_RPT_SNAP) process.

To change the due date, the manager or the administrator must go into the employee evaluation and select the change due date button at the bottom of the evaluation. The evaluation must be *In Progress* to change the due date. Also managers can not change the due dates on their own documents. Only the administrator can do this.

Period Type	Select one of these values to indicate the period in which the number of days you entered should apply: • *Before Period End Date* • *After Period End Date* This field appears if the *Template Setup* is selected in the Due Date Method field. --- **Note:** If you entered *0* in the Document Due Days field, leave this field blank. ---

Evaluations - Evaluation Document Header

If the Evaluation Document Header fields are selected, the system displays the information in the Employee Data section of the evaluation document for corresponding roles.

Empl ID (employee ID)	Select this check box to display the employe's ID in the document header.
Step	Select this check box to display the employee's step ID and description in the document header. You can locate the value for this field on the Salary Plan page.
Grade	Select this check box to display the employee's grade ID and description in the document header. You can locate the value for this field on the Salary Plan page.
Dept ID (department ID)	Select this check box to display the employee's department number and description in the document header. You can locate the value for this field on the Work Location page in Job Data component.

Work Loc (work location)	Select this check box to display the employee's location ID and name in the document header. You can locate the value for this field on the Work Location page in Job Data component.
Yrs of Service (years of service)	Select this check box to display the Years of Service field in the document header, showing the employee's years of service in the company. When calculating years of service for this page, the system uses the current system date or the period end date. **Note:** If you access or print this document after the review period or the service period has ended, it reflects the service that was relevant as of the last day of the performance period. If you access or print this document prior to the period end date, it reflects the employee's service as of the current date.
Yrs in Job (years in job)	Select this check box to display the Years of Job field in the document header, showing the employee's years in the job. When calculating this value, the system uses the current system date or the period end date. **Note:** If you access or print this document after the review period or the service period has ended, it reflects the service that was relevant as of the last day of the performance period. If you access or print this document prior to the period end date, it reflects the employee's service as of the current date.
Rating History	Select this check box to display a link in the document header that takes the user to the Rating History page. The Rating History page displays all of the past overall ratings of the employee for the document type on the template.

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

Related Links

Understanding Advisor Tools
Define Criteria Page

Template Definition - Process Page

Use the Template Definition - Process page (EP_TMPL_DEFN2) to define document processes.

The information that you specify here determines the functions that employees, managers, and other participants can perform in each step of the review process.

Navigation

- (Fluid) Select the Talent Administrator home page and click the Performance Administration tile. On the left navigation, select Documents >Template Definition.

- (Classic) Set Up HCM > Product Related > ePerformance > Document Structure > Template Definition >Template Definition - Process

Image: Template Definition - Process page (1 of 3)

This example illustrates the fields and controls on the Template Definition - Process page (1 of 3).

Image: Template Definition - Process page (2 of 3)

This example illustrates the fields and controls on the Template Definition - Process page (2 of 3).

Image: Template Definition - Process page (3 of 3)

This example illustrates the fields and controls on the Template Definition - Process page (3 of 3).

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

Define Criteria Step

Use the fields in this section to establish the criteria by which the document will be updated and completed. This section appears if the Define Criteria business process is selected on the General page.

Updated By	Select the user roles who can update criteria in documents created from this template.
Approved By	Select the user roles who can complete the Define Criteria step in documents created from this template.
Approval Due in Days	Enter the number of days *After Period End Date* or *Before Period End Date* to be the approval due date.
	This field appears if *Template Setup* is selected as the due date method.
Approval Due Date	Displays the calculated approval due date. This field appears if *Performance Calendar* is selected as the due date method.

Track Progress Steps

Use this section to define the number of checkpoint reviews to be available during the review period and specify roles of users who can add and update these reviews. Also, specify in this section the roles of users who can complete these steps and begin evaluation. This section appears if the Track Progress business process is selected on the General page, and it contains these sub-sections:

- Mid-Period Checkpoints

- Scheduled Checkpoints

- Finalize Criteria

Mid-Period Checkpoints

Updated By	Select the user roles who can update the criteria in the Checkpoint <#> steps in documents.
No. of Checkpoints (number of checkpoints)	Enter the number (0 to 11) of checkpoints scheduled in documents.
	This field is available for entry only when the due date method is set to *Template Setup* on the Template Definition - General page. if the due date method is set to *Performance Calendar*, this field displays the number of checkpoints based on their due dates that are defined in the calendar.
	Note: The maximum number of checkpoints allowed is *11*.

Scheduled Checkpoints

Depending on the number of checkpoints specified, the system populates the same number of rows in this grid.

Checkpoint Due in Days and **Checkpoint Period Basis**	Enter the number of days *After Period End Date* or *Before Period End Date* to be the checkpoint due date.
	These fields appear if *Template Setup* is selected as the due date method.
Checkpoint Due Date	Displays the calculated checkpoint due date.
	This field appears if *Performance Calendar* is selected as the due date method.

Finalize Criteria

Complete By	Select the user roles who can complete the Finalize Criteria step in documents so the evaluation steps can begin.
Copy Comments to Evaluation	Select for the system to copy the latest comments from the Finalize Criteria step to the employee and manager evaluations. Only comments entered by the employee will be copied to the employee self evaluation and only comments entered by the manager will be copied to the manager evaluation.
Final Due in Days	Enter the number of days *After Period End Date* or *Before Period End Date* to be the criteria completion due date.
	These fields appear if *Template Setup* is selected as the due date method.
Final Due Date	Displays the calculated criteria completion due date.
	This field appears if *Performance Calendar* is selected as the due date method.

Nominate Participants

Use the fields in this section to establish who can update and submit the names of people that should participate in the review.

Added By	Select the user roles who can add the name of people to participate in the review.
Submitted By	Select the user roles who can submit the names of nominees to participate in the review.
Tracked By	Select the user roles who can track the nomination process.
Nomination in days	Enter the number of days *After Period End Date* or *Before Period End Date* to be the due date for nominating review participants.
Calendar Due Date	Displays the calculated nomination due date.

	This field appears if *Performance Calendar* is selected as the due date method.
Employee can view before submit	Select to allow employees to view the nominees that were added by the manager before the nominees are submitted. This field appears if the employee role is included in the Added By field.
Employee can delete before submit	Select to allow employees to delete the nominees that were added by the manager before the nominees are submitted. This field appears if the employee role is included in the Added By field.

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

This section appears if the Nominate Participants business process is selected on the Template Definition - General page.

Review Participant Evaluations

Use the fields in this section to establish who can access and view the names of people that are participating in the evaluation. This section appears if the Nominate Participants business process is selected on the <u>Template Definition - General Page</u>.

Track Evaluations	Select to allow manager, employee, or both roles to see the names of people who are participating in the review on the Participant Evaluation modal page.
View Evaluations	Select to allow manager, employee, or both roles to drill down to participants' evaluations on the Participant Evaluation modal page.
	If this option is selected, the Track Evaluations option have to be selected as well.

Anonymity

The Anonymity group box allows you to indicate if the participants reviewing the evaluation (Other and Peer) should be anonymous to the employee, manager or both.

Anonymity for Employee and **Anonymity for Manager**	Select to hide the names of participants of the corresponding role from the employee, manager or both. The system masks the participant's name using this format: *<role name><sequence #>*.
	For example, if you select the Anonymity for Employee field to hide the names of all participants of the Peer role from the employee, the system displays participants' names as *Peer1*, *Peer2* and so on when the employee:
	• Tracks participant nominations using the link on the Steps and Tasks pagelet, if enabled.

	• Reviews participants' evaluations using the link on the Steps and Tasks pagelet, if enabled.
	Similarly, if the Anonymity for Manager option is enabled for the Peer role, the system displays participants' names the same way when the manager tracks participant nominations and reviews participants' evaluations using links on the Steps and Tasks pagelet, as well as reviews participants' feedback at the section level, item level, and subitem level that appears in the manager document.
Display Names in Mgr Doc (display names in manager document)	Select this check box to have the participants' names and job titles appear in the Other Participants collapsible section below the header area of the manager document. The system enables this check box only when the Anonymity for Manager check box is deselected for the role. If the role is anonymous to the manager, then the system does not display the names on the manager document.

Manager Evaluation

Review Process	Select the sequence by which the review is completed.
	This field identifies the process for reviewing a document with the employee, and when this review takes place relative to a formal approval of the document. It also controls when actions such as Submit for Approval, Complete, Share with Employee, and Request Acknowledgement are available to the manager.
	Options are:

- *Apvl After Review-3 Steps* (approval after review-3 steps).

- *Apvl After Review-4 Steps* (approval after review-4 steps): Select if the document approval occurs after the manager reviews the completed document with the employee.

- *Apvl Before Review-3 Steps* (approval before review-3 steps).

- *Apvl Before Review-5 Steps* (approval before review-5 steps): Select if the approval must occur before the manager reviews the completed document with the employee.

- *Apvl No Review* (approval no review): Select if an approval process is required, but the manager does not need to review the document with the employee.

- *No Apvl No Review* (no approval no review): Select if neither an approval process or a review of the completed document is required.

- *No Apvl with Review-2 Steps* (no approval with review-2 steps).

       •   *No Apvl with Review-4 Steps* (no approval with review-4 steps): Select if the manager reviews the completed document with the employee, but no approval process applies.

See <u>Understanding Review and Approval Processes</u>.

Definition ID

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

The default value selected on the Document Type page appears here, but you can change it. This field applies only if the selected review process includes approval.

Valid options are:

•   *ManagerOnly*

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

•   *ManagerToAdmin*

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

•   *AdminOnly*

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

View Average Rating

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

Cancel Outstanding Evaluations

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

Allow Manager Attachments

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

> **Note:** This attachment section is visible to anyone that has access to the manager document. However, only the document owner (manager) can add attachments to the document. The manager has the ability to add and delete one or more attachments when the manager document status is *Evaluation in Progress*. Once the document moves past the *Evaluation in Progress* stage or is canceled, the system does not allow attachments to be added or deleted. They become read-only.

Self Evaluation

Allow Employee Attachments

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

> **Note:** This attachment section is visible to anyone that has access to the self-evaluation. However, only the document owner (employee) can add attachments to the document. The employee has the ability to add and delete one or more attachments when the document status is *Evaluation in Progress*. Once the document moves past the *Evaluation in Progress* stage or is canceled, the system does not allow attachments to be added or deleted. They become read-only.

Evaluation Rules

Use this section to define rules for calculating ratings that apply to the document as a whole.

Rounding Rule

Specify how the system should round calculated ratings whenever the system uses the Average calculation method. Values are *Down, Standard,* and *Up*. With standard rounding, the system rounds up on 5 and rounds down on 4. For example, 2.5 rounds to 3, while 2.4 rounds down to 2. This works in combination with the number of decimal places the system rounds to. For one decimal place, 2.45 rounds to 2.5, while 2.44 rounds to 2.4.

Decimal Places

If you select a rounding rule, enter the number of decimal places for rounding. No more than two decimal places are allowed.

Calculate Ratings

Select this check box if you want the system to automatically performs all roll-up calculations to calculate an overall summary rating. This feature is the default, and causes a Calculate button to appear on the evaluations. To have evaluators manually enter all ratings, deselect this check box.

Map Method

If the Calculate Ratings check box is selected, select how the system should map numeric ratings to qualitative ratings when there is no exact match after the rounding rule is applied. For

example, the calculated rating 2.7 falls between numeric ratings defined on the Rating Model Table page as 1, 2, 3, and 4; the mapping method defines the numeric rating to map to the value 2.7.

Options are *Highest, Lowest,* and *Nearest.*

For example, assume the rating model has the following entries:

A = Superior (numeric rating = 1)

B = Good (numeric rating = 2)

C = Average (numeric rating = 3)

D = Needs improvement (numeric rating = 4)

If the system calculates a rating of 2.7 (between Good and Average, but closer to Average), the mapping method tells the system which entry to pick:

* *Highest* yields the next numerically highest rating—in this case 3, or Average.

* *Lowest* yields the next numerically lowest rating—in this case 2, or Good.

* *Nearest* yields the numerically closest rating—in this case 3, or Average.

* If the calculated rating falls exactly halfway between two ratings in the rating model, the system assigns the numerically higher of the two ratings.

(JPN) Review ID

To enable the (JPN) Salary Planning process by review ID, select the ID. You define IDs on the Define Review JPN page. You can only select documents defined for the selected document type.

(JPN) Include in Grade Advance
(applicable for grade advance)

Select this check box if the selected review ID is eligible for the Grade Advance feature of the Plan Salaries business process. It is selected automatically if theInclude in Grade Advance check box is selected on the Define Review JPN page.

Related Links

Understanding Evaluation Criteria Modification
Understanding Mid-Period Checkpoints
Understanding the Nomination and Tracking Processes
Understanding Evaluation Data Entry
Understanding Feedback Consolidation
Understanding Review and Approval Processes

Template Definition - Tabs Page

Use the Template Definition - Tabs page (EP_TAB_DTL) to define tab labels and display order for use, if the performance documents are configured to display in tabbed format..

Navigation

• (Fluid) Select the Talent Administrator home page and click the Performance Administration tile. On the left navigation, select Documents >Template Definition.

• (Classic) Set Up HCM >Product Related >ePerformance >Document Structure >Template Definition >Template Definition - Tabs

Image: Template Definition - Tabs page

This example illustrates the fields and controls on the Template Definition - Tabs page.

Use this section to define tab labels and display order for use when the performance documents are displayed in tabbed format.

To set up the tabbed display of document, you need to associate each section of the document template with a tab label. The association is established on the Template Definition - Structure page. When a user selects to view the document in a tabbed format at runtime, the tab with the lowest number appears first, followed by the second lowest, and so on.

When you remove a tab from this grid, the system performs a check and displays a warning message if the tab is currently associated with one or more sections.

The Tabs Detail section is not available for edits if the if the Display Type field on the General page is set to *Long Format Only*.

Template Definition - Structure Page

Use the Template Definition - Structure page (EP_TMPL_DEFN3) to define document structure, add appropriate sections to the template, define override default section settings, and define the way each role interacts with the document section.

Navigation

- (Fluid) Select the Talent Administrator home page and click the Performance Administration tile. On the left navigation, select Documents >Template Definition.

- (Classic) Set Up HCM > Product Related > ePerformance > Document Structure > Template Definition >Template Definition - Structure

Image: Template Definition - Structure page (1 of 3)

This example illustrates the fields and controls on the Template Definition - Structure page (1 of 3).
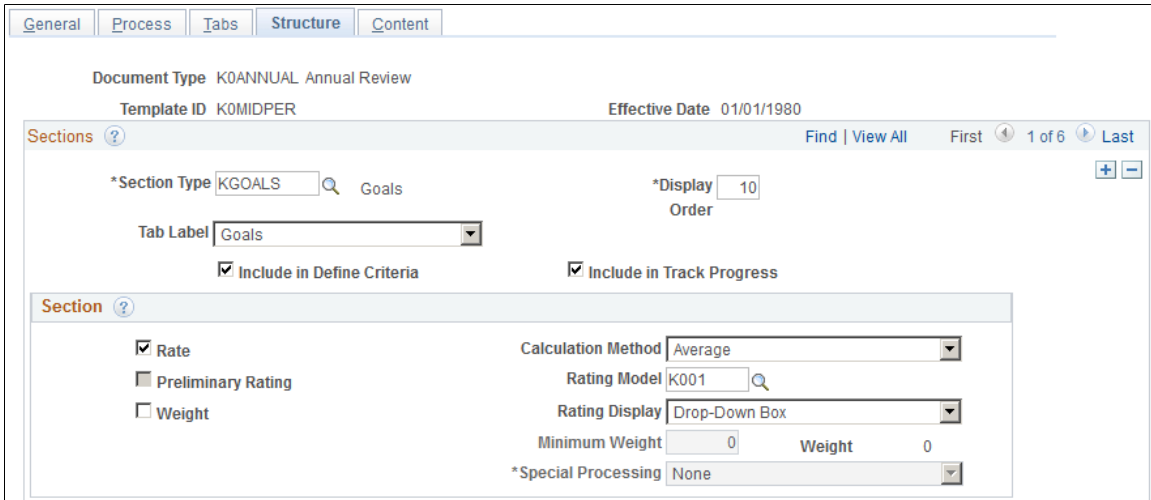
Image: Template Definition - Structure page (2 of 3)

This example illustrates the fields and controls on the Template Definition - Structure page (2 of 3).
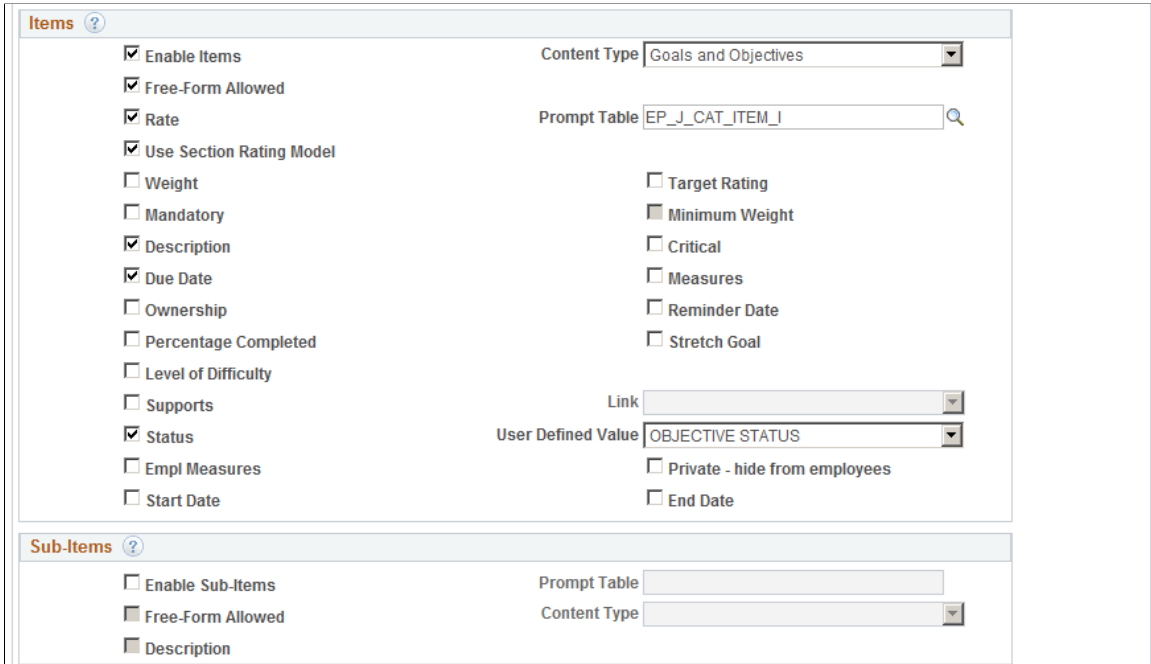
Image: Template Definition - Structure page (3 of 3)

This example illustrates the fields and controls on the Template Definition - Structure page (3 of 3).

Use this page to select sections (defined in the Section Definition page) to be included in documents that are generated from this template. For each selected document section, you specify information such as whether or not its content includes items and sub-items, and that these items and sub-items are rated. In addition, you identify properties that will be tracked for the document section, along with the rules and properties that should be available in the document for each user role that accesses the document section.

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

Section	Select a section to include in the documents that are generated from this template.
	The sections available for selection are those that were previously defined using the Section Definition page. When you select a section, the information defined for that section becomes the default information for this section on the Structure page. You can override any default value.
	Note: You can include only one Overall Summary section on each template.
Tab Label	Select a tab under which the section is displayed, when the document is set to displayed in tabbed format.
	Values that are available in this field are defined on the Template Definition - Tabs page. Each tab must contain at least one section.

Every section, with the exception of the Signature and eSignature sections, needs to be included in a tab.

Include in Define Criteria Select to include this section as part of the Define Criteria step. This check box appears if the Define Criteria business process is selected on the Template Definition - General page.

When this option is selected, the Define Criteria Step - Role Rules group box appears on this page.

Include in Track Progress Select to include this section as part of the Track Progress step. This check box appears if the Track Progress business process is selected on the Template Definition - General page.

When this option is selected, the Track Progress step - Role Rules group box appears on this page.

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

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

Section, Items, Sub-Items, and Profile Management

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

See the Section Definition Page topic for field definitions in these sections and an example on how profiles, when selected, are used to populate content items in new documents that are created for employees.

Define Criteria Step - Role Rules

Use the fields in this section to define what managers and employees can do with items in the Define Criteria step of the evaluation process. Select the appropriate check boxes to grant the manager or employee permission to add items, update items, delete items, copy objective items, copy manager's items, or copy items from other documents on the evaluation document when it's created.

This section appears if the Include in Define Criteria check box is selected.

Add Items Select this check box to enable the role to add items to this section during this step. If the role can add items, they can also update and delete items that they add.

See Add <section item> Page.

Update Items   Select this check box to enable the role to update items in this section during this step that were added by a source other than themselves; for example, the manager, the profile, or the template. In addition, if the item was cascaded down to the document, they can also update it.

Note: The Title, Description and Measurement fields are not available for edit if they come from the Content Catalog.

Delete Items   Select this check box to enable the role to delete items during this step that were added by a source other than themselves; for example, the manager, the profile, or the template. In addition, if the item was cascaded down to the document, they can also delete it.

Copy Objective Items   Select this check box to enable the role to copy business objective items into documents. This option is available only to the *Manager* and *Employee* roles.

See <u>Copy from Business Objectives Page</u>.

Copy Manager's Items   Select this check box to enable the role to copy items into documents from the ones that were created for the manager listed, with matching document usage (performance or development), document type, section, content type and evaluation period. This option is available only to these two roles:

Manager: the user of this role can copy items from documents where he or she is the person to be evaluated.

Employee: the user of this role can copy items from documents where his or her manager is the person to be evaluated.

See <u>Copy from Manager Document Page</u>.

Copy from Another Document Select this check box to enable the role to copy items into documents from the ones that he or she owns, with matching document usage, document type, section, and content type. This option is available only to these two roles:

Manager: the user of this role can copy items from any documents that he or she owns as a manager, regardless of document status.

Employee: the user of this role can copy items from any of his or her previous documents.

See <u>Select a Document Page</u> and <u>Copy <section item> from My Documents or Copy <section item> from My Team's Documents Page</u>.

Track Progress Step – Role Rules

Use the fields in this section to define what managers and employees can do with items in the Track Progress step of the evaluation process. Select the appropriate check boxes to grant the manager or employee permission to add items, update items, delete items, copy objective items, copy manager's items, or copy items from other documents on the evaluation document when it's created.

This section appears if the Track Progress business process is selected on the Template Definition - General page. The Track Progress step shares a number of role rule options with the Define Criteria step.

Item Comments   Select to display the text field at the item level for role users to enter comments during the Track Progress step. The employee and manager can share comments as needed.

                                            Select to enable at least one Item Comments or Section Comments option in any section for the manager role.

Section Comments   Select to display the text field at the item level for role users to enter comments during the Track Progress step. The employee and manager can share comments as needed.

                                            Select to enable at least one Item Comments or Section Comments option in any section for the manager role.

Final Evaluation Step – Role Rules

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

Here are the five tabs:

- Rate/Weight

- Section

- Item

- Edit

- Profile Management

Final Evaluation Step – Role Rules - Rate/Weight

Role   Select the role for which you are defining rules.

Rate Section   Select this check box to enable the author to assign a section rating. This field is available if the Rate option in the Section region is selected for the section.

Rate Item   Select this check box to enable the author to rate items in this section.

                                            This field is enabled if the Rate option in the Items region is selected for the section.

Rate Sub-Item	Select this check box to enable the author to rate sub-items in this section.
	This field is enabled if Rate is selected in the Items page region for the section.
Override Rating	Select this check box to have the Override Rating button appear next to the Calculate button on the evaluation. The author can click this button to modify the calculated rating.
	This option is enabled when the Calculate Ratings check box is selected on the Template Definition - Process page.
	Warning! Do not use this feature with the Summation calculation method.
Employee Rating	Select this check box to display the employee's rating (from the completed self evaluation) in the manager document for this section.
Numeric Rating	Select this check box to have the evaluation display both the rating and the numeric equivalent or points of the rating that you define on the Rating Model Definition page.
	This option is enabled if Rate option in the Section region is selected for the section.
Weight Section	Select this check box to enable the author to assign a section weighting.
	This option is enabled if Weightoption in the Section region is selected for the section.
Weight Item	Select this check box to enable the author to weight items in this section.
	This option is enabled if Weightoption in the Items region is selected for the section.
	The Weight option is available for edits if the Rate option is enabled at the item level.

Final Evaluation Step – Role Rules - Section

Image: Final Evaluation Step - Role Rules: Section on the Structure page

This example illustrates the fields and controls on the Final Evaluation Step - Role Rules: Section on the Structure page.

*Role	Comments	Employee Comments	Participant Feedback	Results Writer	Development Tips	Other Evaluator Comments	Notes		
Employee ▾	☐	☐	☐	Not Used	Not Used	☐	☐	➕	➖
Manager ▾	☐	☐	☐	Not Used	Not Used	☐	☐	➕	➖

Comments

Select this check box to have the section contain an area for users to add a free-form description of the employee's performance on the section. If you do not select this check box for a role, the other selections for the role are not available.

Employee Comments

Select this check box to display the employee's comments (from the completed self evaluation) in the manager document for this section.

This option is available to the Manager role only; it becomes editable if the Comments option is selected for the Employee role.

Participant Feedback

Select this check box to enable managers to view participant (for example, users of *Peer* or *Other* roles) feedback directly on manager documents without any page transfer. Participant feedback, if available, is displayed in a collapsible section at the section, item and sub-item levels based on template setup.

This option is available to the *Manager* role row only. If enabled, managers can view participant feedback when they edit or view manager documents; similarly, administrators and indirect managers can view participant feedback when they view manager documents.

▶ Consolidated Participant Feedback Display in Manager Evaluations

Results Writer

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

Results Writer suggestions are predefined statements that describe the employee's proficiency level for the associated item. The Results Writer tool is designed for competency and sub-competency sections of an evaluation.

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

The available options are:

- *Competency*

  Select to list the Results Writer statements that are associated with competencies. You associate statements with competencies on the <u>Results Writer - Competency Page</u>.

- *Sub-Competency*

  Select to list the Results Writer statements that are associated with sub-competencies. You associate statements with sub-competencies on the <u>Results Writer - Sub-Competencies Page</u>.

- *Not Used*

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

Development Tips

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

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

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

The available options are:

- *Competency*

  Select to list development tips that are associated with competencies. You associate development tips with competencies on the <u>Link Development Tips - Competency Page</u>.

- *Sub-Competency*

  Select to list development tips that are associated with sub-competencies. You associate development tips with competencies on the <u>Link Development Tips - Sub-Competencies Page</u>.

- *Not Used*

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

Other Evaluator Comments

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

<table>
<tr><td></td><td>This field is enabled only if the Comments check box is selected and the role is manager.</td></tr>
<tr><td>**Notes**</td><td>Select this check box to have performance notes that the employee or manager entered during the Establish Criteria step appear on the Suggested Results page. Only notes that were entered for the same section or item by the same person appear on the list.

This field is enabled only if the Comments check box is selected for the role.</td></tr>
</table>

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

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

Final Evaluation Step – Role Rules - Item

Image: Final Evaluation Step - Role Rules: Item on the Structure page

This example illustrates the fields and controls on the Final Evaluation Step - Role Rules: Item tab on the Structure page.

*Role	Comments	Employee Comments	*Results Writer	*Development Tips	Other Evaluator Comments	Notes		
Employee	☑	☐	Not Used	Not Used	☐	☑	+	−
Manager	☑	☑	Not Used	Not Used	☐	☑	+	−

Comments	Select this check box to have items in the section contain an area for authors to add a free-form description of the employee's performance on the item. If this check box is selected, the Results Writer, Development Tips, Other Evaluator Comments, and Notes check boxes are enabled for the role. The use of these fields is analogous to the same fields under the Section tab.
Employee Comments	Select this check box to display the employee's comments (from the completed self evaluation) in the manager document for each section item.
Results Writer	Same as Section tab.
Development Tips	Same as Section tab.

Other Evaluator Comments	Same as Section tab.
Notes	Same as Section tab.

Final Evaluation Step – Role Rules - Edit

Image: Final Evaluation Step - Role Rules: Edit on the Structure page

This example illustrates the fields and controls on the Final Evaluation Step - Role Rules: Edit on the Structure page.

Add	Select this check box to enable the role to add items to this section. If the role can add items, they can also update and delete items that they add.		
Update	Select this check box to enable the role to update items in this section on the documents that are generated for the role that were added by a source other than themselves; for example, the manager, the profile, or the template. In addition, if the item was cascaded down to the document, they can also update it.		
	Note: The Title, Description and Measurement fields are not available for edit if they come from the Content Catalog.		
Delete	Select this check box to enable the role to delete items in this section on the documents that are generated for the role that were added by a source other than themselves (for example, manager, profile, template or cascaded).		
Copy Objective Items	Select this check box to enable the role to copy business objective items into the documents that are generated for the role.		
	This option is available only to the Manager and Employee roles.		
Copy Manager's Items	Select this check box to enable the role to copy items from the manager's document into the documents that are generated for the role.		
	This option is available only to the Manager and Employee roles.		
Copy from Another Document	Select this check box to enable the role to copy items from another document that he or she owns. This option is available only to these two roles:		

Manager: the user of this role can copy items in from any documents that he or she owns as a manager, regardless of document status.

Employee: the user of this role can copy items in from any of his or her previous documents.

When enabled, users can copy items from other documents of the same document type, content type, section, and owner or manager.

Final Evaluation Step – Role Rules - Profile Management

Image: Final Evaluation Step - Role Rules: Profile Management on the Structure page

This example illustrates the fields and controls on the Final Evaluation Step - Role Rules: Profile Management tab on the Structure page.

Final Evaluation Step - Role Rules ⓘ					
Rate/Weight	Section	Item	Edit	Profile Management	
*Role	Update Person Profile	Person Profile Type	Instance Qualifier		
Employee ▾	☐			➕	➖
Manager ▾	☐			➕	➖
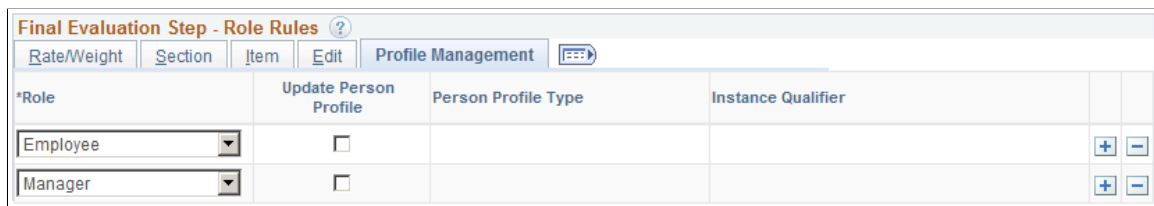
Update Person Profile

Select this check box if you want the system to update the employee's profile in the Manage Profiles business process with this document.

This field is enabled if all these conditions are met:

- The selected special processing in the Section section is either *Business Objectives* or *None.*

- The Rate option is selected in the Items section, and a content type is specified in the Content Type field of the same section.

  In order for the Rate option in the Items section to be editable, the Rate option in the Section section must already be enabled.

- The Rate Item option in the Final Evaluation Step - Role Rules: Rate/Weight section is selected.

> **Note:** No evaluations (peer, employee, manager, and so on) should be sent to Profile Management until the document status is *Complete.* Additionally, no items should be sent to Profile Management from any evaluation until the document has been approved. Since approvals are not required in ePerformance, this means that no items should be sent to Profile Management until the document status is *Complete,* meaning the manager evaluation status is in a *Complete* status and the document status at the header level is also *Complete.*

Person Profile Type   Select the profile type. These profile types are defined in the Manage Profiles business process with an Identity Option equal to *Person.*

                                 This field is available if the Update Person Profile check box is selected.

Instance Qualifier   Select an instance qualifier that distinguishes this evaluation from other evaluations in the Manage Profiles business process. ePerformance delivers instance qualifiers that allow the evaluations coming from ePerformance to be identified as *Manager, Nominee,* or *Self.*

Template Definition - Content Page

Use the Template Definition - Content page (EP_TMPL_DEFN4) to add criteria to sections.

Navigation

- (Fluid) Select the Talent Administrator home page and click the Performance Administration tile. On the left navigation, select Documents >Template Definition.

- (Classic) Set Up HCM > Product Related > ePerformance > Document Structure > Template Definition > Template Definition - Content

Image: Template Definition - Content page

This example illustrates the fields and controls on the Template Definition - Content page.

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

Load Content from Profile   Click this link to access the Load Content from Profile page.

Section Items

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

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

Item ID   Select an item from the Content Item Detail (JPM_CAT_ITEM) table.

                                       You can only select content items that are linked to the content type entered in the Content Type field on the Template Definition - Structure page.

                                       This field does not apply to free-form items.

Title   Enter the title for a free-form item.

                                       You can only enter titles for free-form items. Otherwise, the system displays the text that was entered in the Description field on the Content Items - Items Details page.

Description   Enter the description for a free-form item that you are adding.

	You can only enter descriptions for free-form items. Otherwise, the system displays the text that was entered in the ePerformance Description field on the Content Items - Items Details page.
	This field is enabled only if you selected the Description check box in the Items group box on the Template Definition - Structure page.
Measurement and **Employee Measurement**	Enter text that clearly and objectively describes the standard by which this item is measured. This text appears on the performance or development document.
	The system displays these fields if the Measures check box is selected on the Template Definition - Structure page.
Level of Difficulty	Select either *Advanced, Basic,* or *Intermediate.* Since the values come from the Content Catalog, it follows the same rules as other evaluation criteria fields such as Description and Measurements. To edit the field, select the Edit icon on the Establish Criteria or Document page. Clicking the icon transfers you to the Edit Item page where you can update the criteria.
	The system displays this field if the Level of Difficulty check box is selected on the Template Definition - Structure page.
Rating Model	Select the rating model for this item.
	If you selected the Use Section Rating Model check box in the Items group box on the Template Definition - Structure page, the system display the rating model you entered in Rating Model field in the Section group box on the Template Definition - Structure page.
	The system displays this field if the Rate check box is selected on the Template Definition - Structure page.
Target Rating	Select the rating at which the employee should be performing for this section item.
	The system displays this field if the Target Rating check box is selected on the Template Definition - Structure page.
Weight	Enter the percentage amount that this section contributes to the overall weight.
	The system displays this field if the Weight check box is selected on the Template Definition - Structure page.
Minimum Weight	Enter the minimum percentage amount that you want this item to contribute to overall weight.
	The system displays this field if the Minimum Weight check box is selected on the Template Definition - Structure page.

Supports	Select one of the section items associated with the linked section. The system displays this field if you selected the Support check box and selected a section in the Link field on the Template Definition - Structure page. **Note:** When an ePerformance document is created with sections that support other sections in the document, the document does not recognize that there are content items in the other section if both sections are marked as free form.
Due Date	This field can be used to track the progress of an item and whether it was completed on time. The system displays this field if the Due Date check box is selected on the Template Definition - Structure page.
Reminder Date	This date is used only for informational purposes. The system displays this field if the Reminder Date check box is selected on the Template Definition - Structure page.
Owned By	Select whether the *Employee* or *Manager* is responsible for the completion of this item. The system displays this field if the Ownership check box is selected on the Template Definition - Structure page.
Mandatory	Select this check box to prevent anyone from editing or deleting this item on the document. The system displays this field if the Mandatory check box is selected on the Template Definition - Structure page. **Note:** This selection overrides the value in the Mandatory field on the job profile. If you specify that an item on the job profile is mandatory and do not select this check box, the item is not mandatory on the document.
Critical	Select this check box to have the word *Critical* appear in the detail area of the item on the document. The system displays this field if the Critical check box is selected on the Template Definition - Structure page.

Sub-Items

Use this group box to add sub-items for each item. The system displays this group box only if you select sub-items on the Structure page.

Sub-Item ID	To include a sub-item from the prompt table (typically, a sub-competency) in this section of the document, select the subitem ID. You can select from the items that belong to the sub-items

table that is identified in the Prompt Table field on the Template Definition - Structure page.

This field does not apply to free-form items.

Title	Displays the title of the selected sub-item. If you're adding a free-form sub-item, enter the title here.
Description	Displays the description of the sub-item. The system displays this field if you selected Descriptions in the Sub-items group box on the Structure page.

Load Content From Profile Page

Use the Load Content From Profile page (EP_TMPL_DEFN5) to load content from profiles.

Profiles can be used to load criteria into sections.

Navigation

Click the Load Content from Profile link on the Template Definition - Content page.

Image: Load Content From Profile page

This example illustrates the fields and controls on the Load Content From Profile page.

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

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

Clone Template Definition Page

Use the Clone Template Definition page (EP_CLONE_TMPL) to clone templates.

Navigation

Set Up HCM > Product Related > ePerformance > Document Structure > Clone Template Definition > Clone Template Definition

Image: Clone Template Definition page

This example illustrates the fields and controls on the Clone Template Definition page.

To clone a template:

1. On the search page, enter search criteria to look for and select the document template from which you want to clone.

2. The system displays the Clone Template Definition page.

3. Enter an effective date for the new template.

4. Enter a document type for the new template.

5. Enter an ID (up to eight alphanumeric characters) for the new template.

6. Click the Save button to clone the template.

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

Chapter 4

Setting Up Business Objectives

Understanding Business Objective Setup

This section discusses:

- Business objective overview.

- Permission lists.

- Objective plans.

- Objective section definition.

- Objective template definition.

Business Objective Overview

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

Permission Lists

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

Objective Plans

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

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

Objective Section Definition

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

Objective Template Definition

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

Defining Objective Structures

This topic discusses how to define objective structures.

Pages Used to Define Objective Structures

Page Name	Definition Name	Usage
Objective Plan Page	EPO_OBJ_PLAN	Define at a high level a year or the name of a plan to which you want to link objective pages.
Objective Section Definition Page	EPO_SECTN_DEFN	Define the sections that you want to include on the Objective Template Definition page.
Objective Template Definition - General Page	EPO_TMPL_DEFN	Define the layout of the Objective pages.
Objective Template Definition - Sections Page	EPO_TMPL_SECTION	Specify which sections to be included in the Objective pages and what the sections look like.

Objective Plan Page

Use the Objective Plan page (EPO_OBJ_PLAN) to define at a high level a year or the name of a plan to which you want to link objective pages.

Navigation

Set Up HCM > Product Related > ePerformance > Objective Structure > Objective Plan > Objective Plan

Image: Objective Plan page

This example illustrates the fields and controls on the Objective Plan page.

The objective plan also identifies the hierarchy method. For department hierarchies, the objective plan identifies the tree that is needed to link organizational objectives pages for a particular period to a predefined hierarchy that is created in Tree Manager.

Objective Plan Detail

Status	Select the status of the objective plan. The values are *Active* and *Inactive.* The default is *Active.*
Description	Enter a detailed description of the plan.
Short Description	Enter a short description of the plan. The systems enables you to enter a maximum of 10 characters.
Begin Date and **End Date**	Enter the beginning and ending dates of the plan.
Hierarchy Method	Select either *Department* or *Position.* If you select *Department,* the system displays a group box that allows you to enter setIDs and tree names that are associated with the department.

Department Hierarchy SetIDs

Set ID   Select the set ID that is associated with the department that you
                                    want to add to the objective plan.

Tree Name   Select the name of the tree that is defined for that set ID.

Objective Section Definition Page

Use the Objective Section Definition page (EPO_SECTN_DEFN) to define the sections that you want to
include on the Objective Template Definition page.

Navigation

Set Up HCM > Product Related > ePerformance > Objective Structure > Objective Section
Definition > Objective Section Definition

Image: Objective Section Definition page

This example illustrates the fields and controls on the Objective Section Definition page.

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

Status	Select the status of the objective section. The values are *Active* and *Inactive.* The default is *Active.*
Description	Enter the name of the section. The system uses this name as the default section label on the objective pages.
Short Description	Enter a short description of the section. The systems enables you to enter a maximum of 10 characters.

Items

Enable Items	Select this check box if the section can contain items. When you select this check box, the other fields in this page region are enabled.
Content Type	Select the content type from which content items are pulled when defining the business objectives. Valid options are any content types defined in the content catalog in the Manage Profiles business process.
Free-Form Allowed	Select to enable users to add items that are not stored in the content catalog to the section when displayed on an objective page. The system assigns a unique identifier to each free-form item that is added. These items are not stored for reuse.
Define Content Group	Click this link to display an additional page where you can enter a content group type and content group.
Description	Select to enable the description that is defined for the item to appear on objective pages.
Measures	Select to enable the Measurement field to be displayed as an item on objective pages.
Percentage Completed	Select to enable the Percent Complete field to be displayed as an item on objective pages.
Item Status and **Status Definition**	Select to enable the Status field to be displayed on objective pages. When you select this check box, the system activates the Status Definition field.
	The system displays the prompt list names from the custom list values associated with the Item Status (EP_ ITEM _STATUS) field. You can set up additional prompt lists for this field on the Custom Prompt page in Profile Management (Set Up HCM >Product Related >Profile Management >Profiles >Custom Prompt >Custom Prompt).
Due Date	Select to enable users to enter a due date for items that are displayed on objective pages.
Align Items and **Aligned To**	Select to enable the Alignment functionality. If you select the Align Items check box, the system makes the Aligned To field

active. Select a section from the drop down list box, or *Any Section* to align items to any section on objective pages.

Sub-Items

Enable Sub-Items   Select to enable sub-items on the objective pages. When you select this check box, the other fields in this page region are also enabled.

Content Type   Select the content type (Profile Management) that will be used to obtain the sub-items. The system only displays sub-items that have a child relationship to the item content type in the content catalog.

Free-Form Allowed   Select to enable users to add free-form (non-coded) sub-items to this section.

Description   Select to enable users to have the description for the sub-item appear on objectives pages.

Objective Template Definition - General Page

Use the Objective Template Definition - General page (EPO_TMPL_DEFN) to define the layout of the Objective pages.

Navigation

Set Up HCM > Product Related > ePerformance > Objective Structure > Objective Template Definition > Objective Template Definition - General

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Image: Objective Template Definition - General page

This example illustrates the fields and controls on the Objective Template Definition - General page.

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

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

| Description | Enter the full name of the template. |

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

Page Details

| Default Title | Select to enable a default page title to be entered on the template. When selected, the system enables the Page Title field. |

| Add Dept/Position to Title (add department/position to title) | Select this check box to append the department or position name to the title entered in the Page Title field. In the example here the page name for *Corporate Accounting* would be *2009 Business Objectives for Corporate Accounting.* |

| Enable Comments Switch | Select to make a comments section available in the header section on objective pages. The administrator or page owner can then enter the information into this field when they are updating an objectives page. |

Employee Photo Details

Display Photo   Select to enable a space for a picture on objective pages. When
                                     the system renders an objective page in view-mode only, it
                                     inserts a picture of the objective page owner.

                                     Note: The setting selected for the Display Photo option on
                                     the "HCM Options Page" (PeopleSoft HCM 9.2: Application
                                     Fundamentals) overrides the display photo setting for business
                                     objectives, which is specified here.

Display Name   Select to enable a space for the name of the person in the
                                     picture. The system uses the picture stored on the "Employee
                                     Photo Page" (PeopleSoft HCM 9.2: Human Resources
                                     Administer Workforce).

Display Job Title   Select to enable a space for the title of the person in the picture.

Page Display

Display Type   Select how the Business Objectives page should be displayed.

                                     Values are:

                                     Long Format Only: (default value) Page is displayed as one long
                                     document in sections and users need to scroll down to view the
                                     last section of the document.

                                     Tabs Format Only: Page is displayed in sections as represented
                                     by tabs.

                                     Toggle - Default Long: Page is displayed in long forma by
                                     default t and users can toggle between long and tabbed format.

                                     Toggle - Default Tabs: Page is displayed in tabbed forma by
                                     default t and users can toggle between long and tabbed format.
                                     If the selected display type is not Long Format Only, make sure
                                     to define tabs for use in displaying documents in the tabbed
                                     format on the Tabs page, and then specify a tab label for each
                                     section of the document on the Structure page.

Tabs Detail

This section appears if the selected display type is *not Long Format Only.*

Use this section to define tab labels and display order for use when the Business Objectives page is
displayed in tabbed format. You associate each section with a tab label on the Sections page. When
business objectives are displayed in tabbed format, the tab with the lowest number appears first, followed
by the second lowest, and so on.

Objective Template Definition - Sections Page

Use the Objective Template Definition - Sections page (EPO_TMPL_SECTION) to specify which sections to be included in the Objective pages and what the sections look like.

Navigation

Set Up HCM >Product Related >ePerformance >Objective Structure >Objective Template Definition >Sections

Image: Objective Template Definition - Sections page

This example illustrates the fields and controls on the Objective Template Definition - Sections page.

Sections

Section	Select the sections that will be used in objective pages.
	This drop-down list box includes all the objective sections that have been defined as of the effective date on the Objective Template page. Once you select a section, the system refreshes the page and defaults the section definition parameters into the template.

	The administrator can modify the parameters as needed on the template. The system does not modify the section definition when changes are made on the template. These changes affect that template only.
Display Order	For each section, use a number to indicate the order in which the section should be displayed on objective pages.
	The system displays the sections in ascending order. Therefore, the lowest number section is displayed first on the page. The default value for the first section entered should be 10. Each time you enter a new section, the system defaults the next value by incriminating the highest value by tens.
Tab Label	Select the tab in which this section displays on the Business Objectives page.

Items

Enable Items	Select this check box if the section can contain items. When you select this check box, the other fields in this page region are enabled.
Content Type	Select the content type from which content items are retrieved when defining business objectives. Valid options are any content types defined in the content catalog in the Manage Profiles business process.
Free-Form Allowed	Select to enable users to add items that are not stored in the content catalog to this section of objective pages. The system assigns a unique identifier to each free-form item that is added. These items are not stored for reuse.
Define Content Group	Click this link to display an additional page where you can enter a content group type and content group.
Description	Select to enable the description that is defined for the item to appear on objective pages.
Measures	Select to enable the Measurement field to be displayed as an item on objective pages.
Percentage Completed	Select to enable the Percent Complete field to be displayed as an item on objective pages.
Item Status and **Status Definition**	Select to enable the Status field to be displayed on objective pages. When you select this check box, the system activates the Status Definition field. The system displays the prompt list names from the custom list values associated with the Item Status (EP_ITEM _STATUS) field. You can set up additional prompt lists for this field in Profile Management (Set Up HCM >Product Related >Profile Management >Profiles >Customer Prompts).

Due Date	Select to enable users to enter a due date on objective pages.
Align Items and **Aligned To**	Select to enable the Alignment functionality. If you select the Align Items check box, the system makes the Aligned To field active. Select a section from the drop down list box, or *Any Section* to align items to any section on objective pages.

Sub-Items

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

Configuring Email Notifications for Business Objectives

This topic provides an overview of email notification configuration and discusses how to configure email notifications for business objectives.

Page Used to Configure Email Notifications for Business Objectives

Page Name	*Definition Name*	*Usage*
Objective Pages Page	EP_INSTALL_OBJ	Define what email notifications that will be sent when various steps in the business process are triggered

Understanding Email Notification Configuration

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

Objective Pages Page

Use the Objective Pages page (EP_INSTALL_OBJ) to define what email notifications that will be sent when various steps in the business process are triggered.

Navigation

Set Up HCM >Install >Product Specific >ePerformance Installation > Objective Pages

Image: Objective Pages page

This example illustrates the fields and controls on the Objective Pages page.

Last Page ID	Enter the number from which the system should begin generating page IDs. The system automatically generates the page ID by adding 1 to the Last Page ID.
	Warning! Entering a value that is lower than the value that appears can cause unpredictable results.
Last Objective Item ID	Enter the number from which the system should begin generating objective item IDs. The system automatically generates the objective item ID by adding 1 to the Last Objective Item ID.
	Warning! Entering a value that is lower than the value that appears can cause unpredictable results.
Notify owner when page is created	Select to send an email notification to the business objective owner when the page is created and an owner is assigned.
Notify new owner when page has been transferred	Select to send an email notification to the business objective owner to whom the page has been transferred.
Notify old owner when page has been transferred	Select to send an email notification to the old business objective owner that the page has been transferred to a new owner.

Notify administrator when page is submitted for publication

Select to send an email notification to the administrator letting him or her know that the page is ready and waiting to be published.

Notify page owners when page has been published

Select to send email notifications to the business objective page owners that have access to the published page. Typically these individuals will need to update their pages and link their objectives to the pages above them that have already been published.

One notification per publication process

Select to bundle the requests and send only one notification to the recipient, even if there are multiple pages in the process for which they could be notified.

Notify direct/indirect reports when page has been published

Select to send email notifications to employees who are direct and indirect reports that have access to the published page. Typically these individuals will need to update their ePerformance document and link their objectives to the objective pages above them that have already been published.

One notification per publication process

Select to bundle the requests and send only one notification to the recipient, even if there are multiple pages in the process for which they could be notified.

Notify only on first publication

Select to send email notifications to recipients only on the first publication of the business objective page.

Notify Employee when Objective Item is cascaded to their document

Select to send an email notification to the employee when an objective item has been cascaded down to their performance document.

Notify Manager when Objective Item is cascaded to their document

Select to send an email notification to the manager when an objective item has been cascaded down to the performance documents of their employees.

Chapter 5

Setting Up Text for Advisor Tools

Understanding Advisor Tools

This topic lists common elements and discusses:

- Template setup for using results writer and development tips.

- Search indexes for results writer and development tips.

Common Elements Used to Set Up Advisor Tools

Language Checker

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

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

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

Results Writer

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

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

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

Development Tips

Development tips suggest ways for employees to improve, develop, or use a competency or sub-competency based on their current rating level. If you use ePerformance and have

implemented this feature, the system displays the appropriate set of tips when you click the Writing Tool link on an evaluation.

Template Setup for Using Results Writer and Development Tips

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

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

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

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

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

Related Links
Creating Document Templates

Search Indexes for Results Writer and Development Tips

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

Related Links

Building PeopleSoft Search Indexes
Working with Writing Tools

Defining Content for the Language Checker Tool

To define content for the Language Checker tool, use the Language Checker Suggestions (EP_CHK_SUG_TBL) and Language Checker Words (EP_CHK_WRD_TBL) components.

This section discusses how to define language checker content.

Pages Used to Define Language Checker Content

Page Name	Definition Name	Usage
Language Checker Word Page	EP_CHK_WRD_TBL	Define the objectionable words and phrases, and link them to suggested wordings.
Language Checker Suggestion Page	EP_CHK_SUG_TBL	Define suggested wordings.

Related Links

Working with Writing Tools

Language Checker Word Page
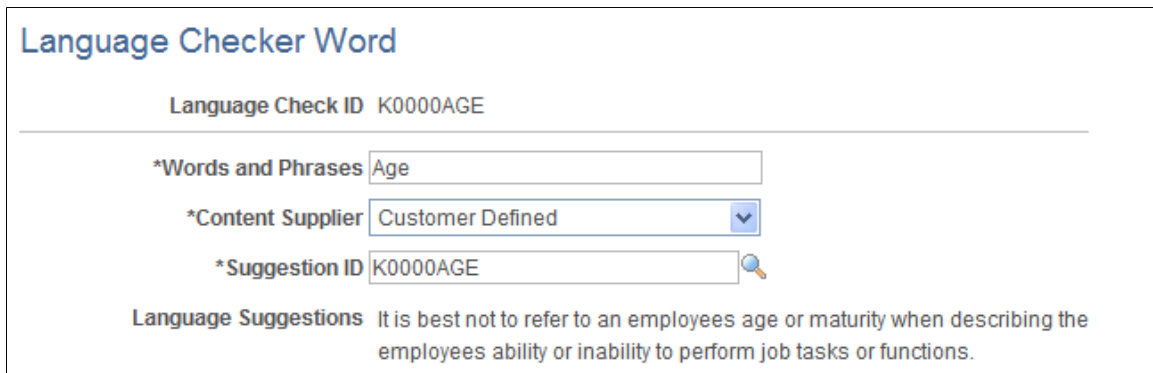
Use the Language Checker Word page (EP_CHK_WRD_TBL) to define the objectionable words and phrases, and link them to suggested wordings.

Navigation

Set Up HCM >Product Related >ePerformance >Advisor Tools >Language Checker Words >Language Checker Word

Image: Language Checker Word page

This example illustrates the fields and controls on the Language Checker Word page.

Language Checker Word

Language Check ID K0000AGE

*Words and Phrases Age
*Content Supplier Customer Defined
*Suggestion ID K0000AGE
Language Suggestions It is best not to refer to an employees age or maturity when describing the employees ability or inability to perform job tasks or functions.

Words and Phrases	Enter the word or phrase that is deemed inappropriate in a performance document. Case is not important (the Language Checker tool is not case-sensitive). When invoked, the Language Checker tool follows these search rules: • If you enter a single word here, the Language Checker tool searches for whole words that match. • If you enter multiple words, the Language Checker tool looks for phrases with an exact match.
Content Supplier	Select the source of the content. The default value is *Customer Defined*.
Suggestion ID	Enter the ID for the suggested words or phrases that managers can use instead of the words and phrases entered on this page. You define language suggestions and IDs on the Language Checker Suggestion page.
Language Suggestions	Displays the language suggestions that are associated with the suggestion ID.

Language Checker Suggestion Page

Use the Language Checker Suggestion page (EP_CHK_SUG_TBL) to define suggested wordings.

Navigation

Set Up HCM >Product Related >ePerformance >Advisor Tools >Language Checker Suggestions >Language Checker Suggestion

Image: Language Checker Suggestion page

This example illustrates the fields and controls on the Language Checker Suggestion page.

Content Supplier	Select the source of the content: *Customer Defined* or the third-party supplier's name.
Language Suggestions	Enter language suggestions for words and phrases, or list the reasons why the manager should not use certain words and phrases.
Proper Usage	Enter examples of the proper usage of words or phrases.
Incorrect Usage	Enter examples of the incorrect usage of words or phrases.

Defining Content for the Development Tips and Results Writer Tools

To define content for the development tips and results writer tools, use the Define Development Tips (EP_DEV_TIP_TBL_EP) and Results Writer (EP_COMP_WRT_TBL) components.

This topic lists prerequisites and discusses how to define content for the development tips and results writer tools.

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

Page Name	Definition Name	Usage
Define Development Tips Page	EP_DEV_TIP_TBL	Define development tips or modify those that are imported from third-party suppliers.
Link Development Tips - Competency Page	EP_COMP_DEV_TBL	Associate development tips with each level of proficiency in a competency.
Link Development Tips - Sub-Competencies Page	EP_SUB_DEV_TBL	Associate development tips with each level of proficiency in a sub-competency.
Results Writer - Competency Page	EP_COMP_WRT_TBL	Define Results Writer statements for each level of proficiency associated with a competency.
Results Writer - Sub-Competencies Page	EP_SUB_WRT_TBL	Define Results Writer statements for each level of proficiency associated with a sub-competency.

Related Links

Working with Writing Tools

"Understanding the Content Catalog" (PeopleSoft HCM 9.2: Human Resources Manage Profiles)

Prerequisites

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

- Rating models.

- Competencies and sub-competencies.

- Competency and sub-competency proficiency levels.

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

See .

Define Development Tips Page

Use the Define Development Tips page (EP_DEV_TIP_TBL) to define development tips or modify those that are imported from third-party suppliers.

Navigation

Set Up HCM > Product Related > ePerformance > Advisor Tools > Define Development Tips > Define Development Tips

Image: Define Development Tips page

This example illustrates the fields and controls on the Define Development Tips page.

Define Development Tips

Development Tip ID CHANGE03

*Title Adapts to change - Strength

*Content Supplier Customer Defined

Description Be a champion for change. Initiate the efforts to deliver the message or vision for change to everyone.

After development tips are defined, link them to competencies and sub-competencies. One development tip can be linked to one or more competencies and sub-competencies.

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

Related Links

Linking Development Tips to Competencies and Sub-Competencies

Link Development Tips - Competency Page

Use the Link Development Tips - Competency page (EP_COMP_DEV_TBL) to associate development tips with each level of proficiency in a competency.

Navigation

Set Up HCM > Product Related > ePerformance > Advisor Tools > Link Development Tips > Link Development Tips - Competency

Image: Link Development Tips - Competency page

This example illustrates the fields and controls on the Link Development Tips - Competency page.
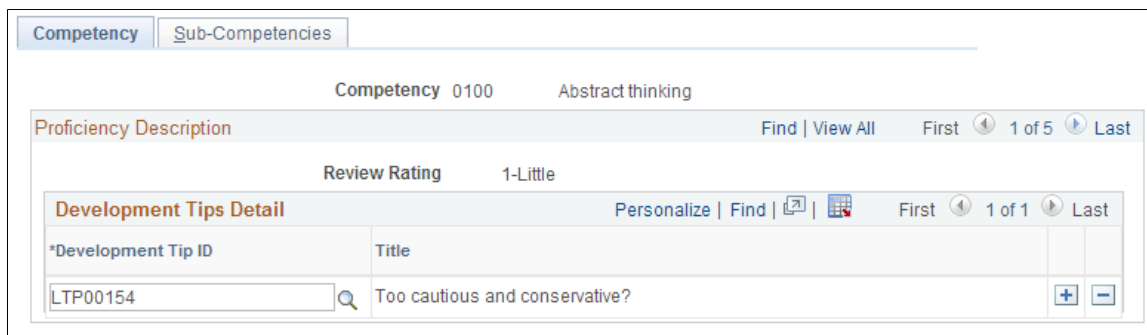
Development Tip ID	Select a development tip in the system to link to the associated review rating.

Link Development Tips - Sub-Competencies Page

Use the Link Development Tips - Sub-Competencies page (EP_SUB_DEV_TBL) to associate development tips with each level of proficiency in a sub-competency.

Navigation

Set Up HCM > Product Related > ePerformance > Advisor Tools > Link Development Tips > Link Development Tips - Sub-Competencies

Image: Link Development Tips - Sub-Competencies page

This example illustrates the fields and controls on the Link Development Tips - Sub-Competencies page.

The Link Development Tips - Sub-Competencies page and Link Development Tips - Competency page are similar in appearance and usage.

Results Writer - Competency Page

Use the Results Writer - Competency page (EP_COMP_WRT_TBL) to define Results Writer statements for each level of proficiency associated with a competency.

Navigation

Set Up HCM > Product Related > ePerformance > Advisor Tools > Results Writer > Results Writer - Competency

Image: Results Writer - Competency page

This example illustrates the fields and controls on the Results Writer - Competency page.

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

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

Seq Nbr (sequence number)	Enter a number that determines the order in which managers see the statements when they use the Results Writer tool for this competency.
Results Writer	Enter one or more sentences to describe the selected proficiency level.
	You can insert the following characters to personalize the text based on the employee's name and gender.

- %1 = Employee's First Name

- %2 = He or She

- %3 = His or Her

- %4 = Him or Her

- %5 = Himself or Herself

Important! In order to add results writer statement to a sub-competency, make sure that the proficiency description of the sub-competency is already set up, and that the sub-competency is related to the competency. Both the proficiency description and the relationship with a sub-competency are defined under Set Up HCM >Product Related >Profile Management >Content Catalog >Content Items.

Results Writer - Sub-Competencies Page

Use the Results Writer - Sub-Competencies page (EP_SUB_WRT_TBL) to define Results Writer statements for each level of proficiency associated with a sub-competency.

Navigation

Set Up HCM > Product Related > ePerformance > Advisor Tools > Results Writer > Results Writer - Competency >Results Writer - Sub-Competencies

Image: Results Writer - Sub-Competencies page

This example illustrates the fields and controls on the Results Writer - Sub-Competencies page.

The Results Writer - Sub-Competencies page and Results Writer - Competency page are similar in appearance and usage.

Linking Development Tips to Competencies and Sub-Competencies

To link development tips to competencies and sub-competencies, use the Link Development Tips (EP_COMP_DEV_TBL) component.

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

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

Page Name	Definition Name	Usage
Link Development Tips - Competency Page	EP_COMP_DEV_TBL	Links one or more developments tips to a competency.
Link Development Tips - Sub-Competencies Page	EP_SUB_DEV_TBL	Links one or more developments tips to a sub-competency. The Link Development Tips - Sub-Competencies page acts in a similar fashion to the Link Development Tips - Competency page and is not documented separately.

Link Development Tips - Competency Page

Use the Link Development Tips - Competency page (EP_COMP_DEV_TBL) to links one or more developments tips to a competency.

Navigation

Set Up HCM > Product Related > ePerformance > Advisor Tools > Link Development Tips > Link Development Tips - Competency

Image: Link Development Tips - Competency page

This example illustrates the fields and controls on the Link Development Tips - Competency page.

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

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

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

Important! In order to link development tips to a sub-competency, make sure that the proficiency description of the sub-competency is already set up, and that the sub-competency is related to the competency. Both the proficiency description and the relationship with a sub-competency are defined under Set Up HCM >Product Related >Profile Management >Content Catalog >Content Items.

Importing Third-Party Content

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

Pages Used to Import Data

Page Name	Definition Name	Usage
"File Inbound Page" (PeopleSoft 9.2: Integration Interfaces)	EO_FILE_INBOUND	Select the file that you are importing into the Advisor tools.
"Inbound File Page" (PeopleSoft 9.2: Integration Interfaces)	EO_FILETOMSG	Initiate a background process to populate entries from third-party providers.
Process List Page	PMN_PRCSLIST	View the status of background processes that you initiate. See *PeopleTools: Process Scheduler*, "Viewing the Status of Processes"

Related Links
"Understanding the Flat File Utility" (PeopleSoft 9.2: Integration Interfaces)

Understanding Third-Party Data Import

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

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

Preparing to Import Data

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

This table lists the identifiers for the inbound file rules.

File Identifier	Description
EP_CHK_SUG	Language Checker suggestions
EP_CHK_WRD	Language Checker words and phrases
EP_COMPETENCY	Competencies
EP_ COMP_DEV	Development tips for competencies
EP_COMP_PROF	Proficiency statements for competencies
EP_DEV_TIP	Development tips
EP_RATING_MDL	Rating models
EP_REVW_RATING	Levels of ratings for rating models
EP_SUB_COMP	Sub-competencies
EP_SUB_DEV	Development tips for sub-competencies
EP_SUB_PROF	Proficiency statements for sub-competencies
EP_SUB_WRT	Results Writer statements for sub-competencies

Importing Data

To import data:

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

   Channels are delivered paused.

   Follow the procedure for configuring a message channel.

   See *PeopleTools: Integration Broker*.

2. Ensure that each message, its PeopleCode subscription, and its Integration Broker transaction are active.

3. Open PeopleSoft Process Scheduler.

   The application server must have publish and subscribe running.

See *PeopleTools: System and Server Administration*.

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

   The publish process converts the flat file to a message.

   a. Select Enterprise Components, Integration Definitions, Initiate Processes, Inbound File Publish.

   b. Create a run control and initiate the process.

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

      See "Understanding the Flat File Utility" (PeopleSoft 9.2: Integration Interfaces).

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

6. Confirm that the subscription occurred.

   a. Access the Monitor Message component by selecting PeopleTools, Integration Broker, Monitor, Monitor Message.

   b. Select the local node in the Publish Node field and *Subscription Contract* in the Queue Type field.

      Look for a subscription contract for the message just processed.

Building PeopleSoft Search Indexes

This section provides an overview of:

- Search definitions.

- Search categories.

- Search index schedule and search indexes.

Search Definitions

Search definitions are business objects that are made available for text search. Each search definition is associated with a query to capture the business context data needed for the search. The search definition provides the information required by the search framework to enable the system to create search results (search documents).

ePerformance delivers these search definitions that are used when users search for development tips and results writer through the writing tool function:

- HC_EP_DEV_TIP

  Used for development tips which are not connected to a competency or sub-competency.

- HC_EP_DEVSUB_TIP

  Used for development tips for competencies.

- HC_EP_DEVCOMP_TIP

  Used for development tips for sub-competencies.

- HC_EP_WRITER_COMP

  Used for results writer for competencies.

- HC_EP_WRITER_SUBCOMP

  Used for results writer for sub-competencies.

Search Categories

Search categories allow for the logical groupings of search definitions. Technically, end users run searches against search categories and not individual search definitions, therefore, each search definition has to belong to at least one search category.

ePerformance delivers a search category for each delivered search definition with the same name:

- HC_EP_DEV_TIP

- HC_EP_DEVSUB_TIP

- HC_EP_DEVCOMP_TIP

- HC_EP_WRITER_COMP

- HC_EP_WRITER_SUBCOMP

Search Index Schedule and Search Indexes

A search index schedule specifies a search definition that needs to be crawled. When the search index schedule process is run, it generates an XML feed and creates a schedule in the search engine which in turn crawls XML feed and builds the search index.

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

Use the PTSF_SCHEDULE run control component provided in the PeopleSoft Search Framework to handle the launching of the PTSF_GENFEED process, which builds or rebuilds these indexes as necessary:

- HC_EP_DEV_TIP

- HC_EP_DEVCOMP_TIP

- HC_EP_DEVSUB_TIP

- HC_EP_WRITER_COMP

- HC_EP_WRITER_SUBCOMP

The Index Build process must be run separately for each of the search definitions after they have been deployed.

Global Search for ePerformance Documents

ePerformance performance documents and development documents are searchable through Global Search (a PeopleSoft Search Framework feature). In addition to accessing the corresponding components using the classic menu navigations, users can go to these documents directly by initiating keyword search against the *Performance Documents* search category in the Global Search bar, which appears in the header of the application if enabled (right below the menu navigation path).

See "Using Global Search Definitions for HCM" (PeopleSoft HCM 9.2: Application Fundamentals).

PeopleSoft Global Search - HCM

Steps for Enabling Results Writer and Development Tips Search in ePerformance Documents

Follow the PeopleTools installation document and the PeopleSoft Search Framework documentation for the complete setup of the functionality.

To ensure that users can search for results writer comments and development tips in ePerformance documents:

1. Deploy search definitions delivered in ePerformance.

   For more information about search definitions, see *PeopleTools: Search Technology*.

2. Deploy ePerformance search categories delivered in ePerformance.

   Note: When you deploy a search definition, the search category of the same name is automatically deployed.

   For more information about search categories, see *PeopleTools: Search Technology*.

3. Build search indexes for search definitions.

   If the index is going to be created for the for the first time, create a full index. For subsequent runs, use the incremental index option.

   For more information about search indexes, see *PeopleTools: Search Technology*.

4. Test the search functionality.

   If the index build process is completed successfully, test the search functionality by:

   • Using the Search Test page provided in PeopleTools.

     For more information about the Search Test page, see *PeopleTools: Search Technology*.

   • Performing a search on development tips or results writer text in a performance or development document.

Chapter 6

Setting Up Due Date Notifications

Understanding Due Date Notifications

The Due Date Notifications feature sends email messages to managers, employees, and peer reviewers automatically and reminds them about the due dates of their evaluation documents. It leverages the HR Notification framework to identify recipients, configure email templates, and generate email notifications for delivery.

Note: Email notifications for employees are created in the same language as their associated documents. For managers and participants, these notifications are created in their preferred language that is selected on the User Profiles - General page (USER_GENERAL), or the base language if the preferred language is not specified.

As an administrator, you can select the type of notifications that users receive. Each process step in the evaluation cycle is a type of due date notification, which includes:

- Define Criteria

- Checkpoint

- Finalize Criteria

- Nominate Participants

- Evaluation

For each step that you want to enable for due date notifications, you can specify when they are sent. ePerformance delivers three alert types, which define the number of days before the due date that these reminders need to be generated and sent. You can select up to three levels of due date reminders to send to users for each step.

After the configuration for due date and alert types is complete, you run an application engine (AE) program (EP_INIT_NOTIF) that first extracts the due date information from all documents that are not completed or canceled and are currently in progress at any step in the evaluation cycle, and then loads it into the schedule table (EP_NOTIFY_TBL). Going forward, any evaluation creation or update that occurs after this initial load is validated online, and added or updated in the schedule table when applicable. This table provides the most current scheduling information for processing due date notifications.

As mentioned previously, ePerformance leverages the HR Notification framework to configure recipients and email templates for use in due date notifications, and deliver them. As scheduled, the framework runs to look up from the schedule table a list of evaluations for which due date notifications need to be sent based on the configuration settings. Then, it generates due date notifications for these evaluations and sends them to the corresponding recipients. A recipient of a due date notification is a user whose role is given permission to update a document in a process step, as specified in the document template setup. For managers who may receive multiple reminders from their teams' evaluations on a single day, their reminders are consolidated in one email notification for delivery.

Image: Due Date Notifications Process Flow

This diagram illustrates the high-level process flow for due date notifications, which includes preparing data, setting up the feature, and running a nightly job that composes and sends due date reminders to corresponding recipients.
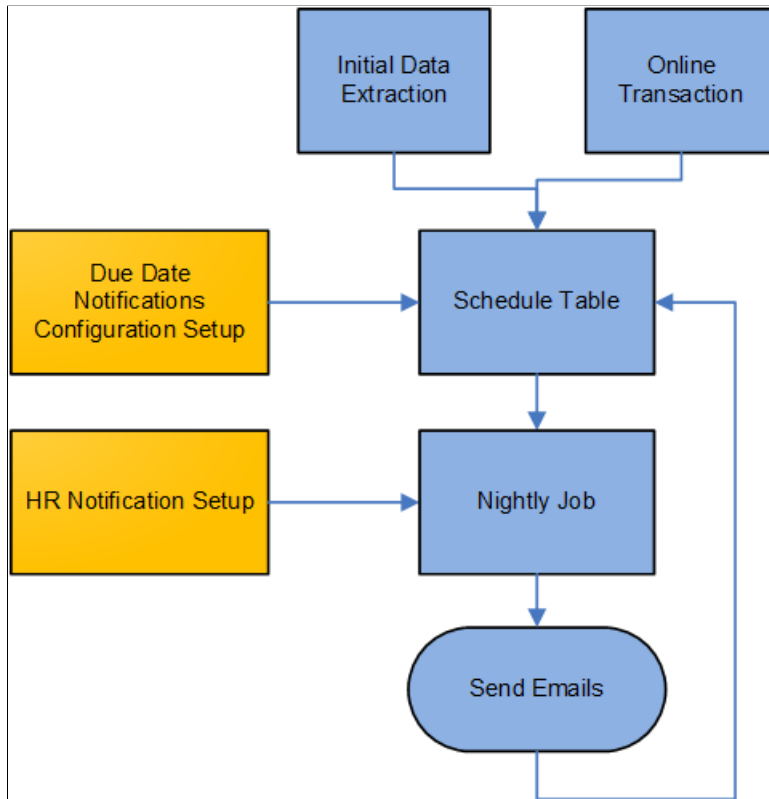
Refer to the Setting Up Due Date Notifications topic for a complete list of setup steps for the Due Date Notifications feature.

▶ Image Highlights, PeopleSoft HCM Update Image 27: ePerformance Due Date Notifications

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Due Date Notification Example

Here is an example of a due date notification schedule of an evaluation document. In this example, the system is configured to send all three types of email reminders for all evaluation steps using these values: 60 days, 30 days, and 5 days before due date. The column on the far right lists the calculated dates on which due date notifications are sent for each step based on step due dates and the setup of the feature.

Due Date Type or Evaluation Step	Step Due Date	Who To Notify	WHEN DUE DATE NOTIFICATIONS ARE SENT
Define criteria	April 1	Manager, employee, or both **Note:** Roles of recipients come from the document template.	January 31 (courtesy, 60 days before due date) March 2 (warning, 30 days before due date) March 27 (critical, 5 days before due date)

Due Date Type or Evaluation Step	Step Due Date	Who To Notify	WHEN DUE DATE NOTIFICATIONS ARE SENT
Nominate participants	May 1	Manager, employee, or both	March 2 April 1 April 26
Complete mid-period checkpoint	Jun 1	Manager or both	April 2 May 2 May 27
Finalize criteria	October 1	Manager, employee, or both	August 2 September 1 September 26
Employee completes self-evaluation	December 1	Employee	October 2 November 1 November 26
Participant completes peer review	December 5	Participant	October 6 November 5 November 30
Manager completes employee evaluation	December 31	Manager	November 1 December 1 December 26

Using the PeopleSoft Fluid User Interface to Set Up Due Date Notifications

This topic discusses a list of pages that individuals with the ePerformance Setup User role can access from a single place in the PeopleSoft Fluid User Interface to set up the Due Date Notifications feature.

For general information about fluid pages in PeopleSoft HCM, see "Understanding PeopleSoft Fluid User Interface Home Pages" (PeopleSoft HCM 9.2: Application Fundamentals).

▶   Workforce Administrator and Talent Administrator Homepages - Image Highlights

▶   PeopleSoft Fluid User Interface Experience in HCM

Pages Used to Set Up Due Date Notifications Using the PeopleSoft Fluid User Interface

Page Name	Definition Name	Usage
Performance Notifications Tile	HC_PERF_NOTIF_TILE_FL (cref for the tile)	Access pages to set up the Due Date Notifications feature that generates and sends due date reminders for evaluation documents.
ePerformance Installation ePerformance Page	EP_INSTALLATION	Enable the Due Date Notifications feature and specify scheduling options.
Maintain Text Catalog "Maintain Text Catalog Page" (PeopleSoft HCM 9.2: Application Fundamentals)	HR_SSTEXT_TEXT	Review text catalogs for use in due date notifications and modify them if needed.
Notification Recipient Setup "Specify Recipient Type Information Page" (PeopleSoft HCM 9.2: Application Fundamentals)	HCSC_RCPNT_SETUP	Review the recipient type to be used when creating HR notification IDs.
Configure Email Template "Configure Email Template Page" (PeopleSoft HCM 9.2: Application Fundamentals)	HCSC_NOTIF_TMPL	Verify the bind parameters population method for email templates.
HR Notification "HR Notification Page" (PeopleSoft HCM 9.2: Application Fundamentals)	HCSC_NOTIF_ADHOC	Verify HR Notification IDs.
Process Notifications "Setting Up and Using HR Notifications" (PeopleSoft HCM 9.2: Application Fundamentals)	HCSC_NOTIF_RC	Schedule and run the process to generate and send due date notifications.

Performance Notifications Tile

Use the Performance Notifications tile (HC_PERF_NOTIF_TILE_FL) to access pages to set up the Due Date Notifications feature that generates and sends due date reminders for evaluation documents.

Navigation

Click the title of the default home page and select *Talent Administrator* from the list that appears. The Performance Notifications tile is displayed on the Talent Administrator page.

As an ePerformance setup user, you can add the tile, through personalization, to a system-delivered home page or a home page that you create.

Image: (Tablet) Performance Notifications tile

This example illustrates the (tablet) Performance Notifications tile.
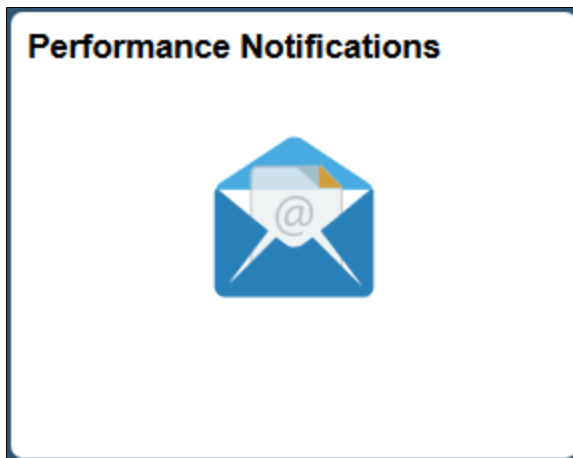
Image: (Smartphone) Performance Notifications tile

This example illustrates the (smartphone) Performance Notifications tile.
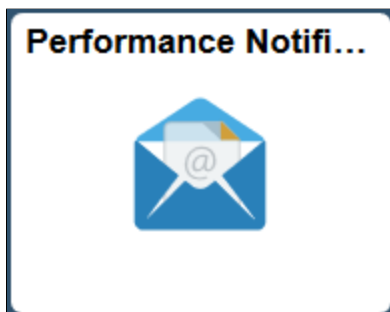
Click the Performance Notifications tile to access the Performance Notifications application start page, which contains a list of administrator-specific pages for setting up the Due Date Notifications feature.

Image: Performance Notifications application start page

This example illustrates the fields and controls on the Performance Notifications application start page.

Note: Access to this tile is restricted to users who are members of the *ePerformance Setup* role.

The left panel lists the pages that the ePerformance administrator navigates to set up the Due Date Notifications feature:

• ePerformance Installation

• Maintain Text Catalog

• Notification Recipient Setup

• Configure Email Template

• HR Notification

• Process Notifications

Refer to the <u>Setting Up Due Date Notifications</u> topic for more information about the setup for the Due Date Notifications feature.

Setting Up Due Date Notifications

This topic lists the setup tasks for the Due Date Notifications feature.

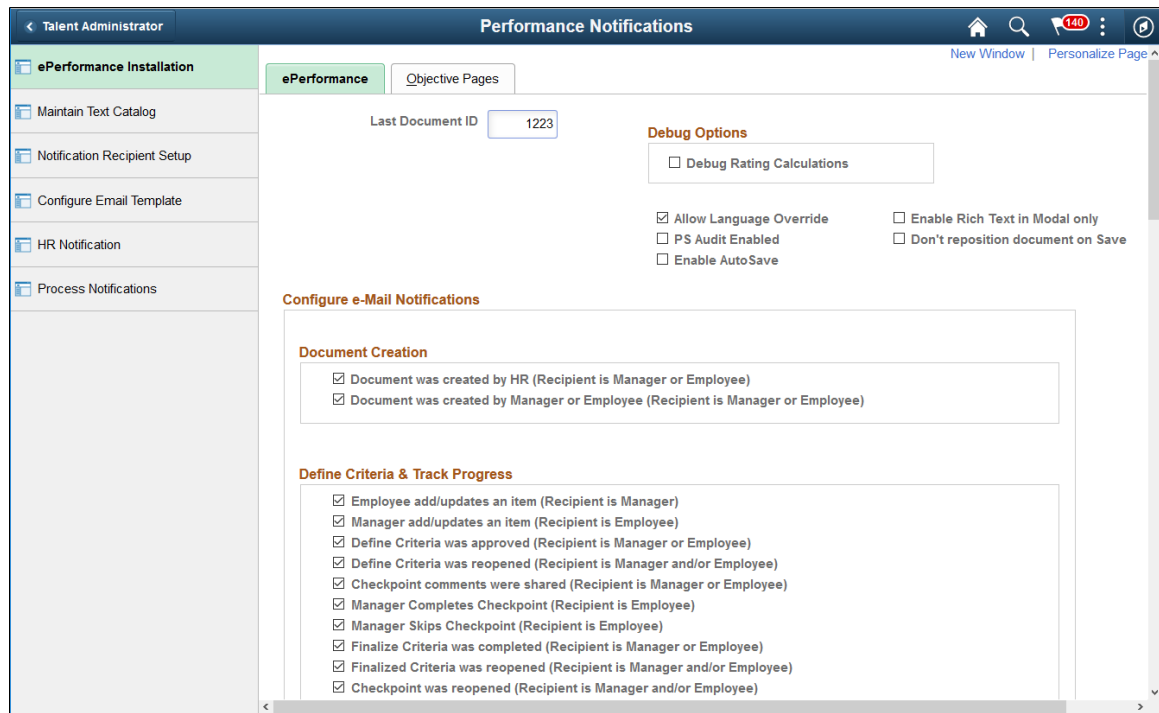To set up the system to generate and send due date notifications for evaluation documents:

1. Enable the Due Date Notifications feature, and specify the configuration options for it on the ePerformance Page. Each time the HR Notification framework runs to send due date notifications, it executes the setup options that are selected at the time in the Configure Due Date Notifications section of the installation page.

    By default, this feature is disabled.

2. Run the *Initialize Due Date emails* (EP_INIT_NOTF) application engine (AE) program on the Application Engine Request page (AE_REQUEST) to load initial data that is used for generating email reminders. This process first extracts the due date information from all documents that are not completed or canceled and are currently in progress at any step in the evaluation cycle, and then loads it into the schedule table (EP_NOTIFY_TBL).

    It is not necessary to run this initialization process if there are no in-progress documents in the system.

    For more information about the Application Engine Request page, refer to the Running Application Engine Programs topic in *PeopleTools: Application Engine*.

3. Use SQL to update the OPRID field of the delivered HR Notification IDs to the OPRID of the ePerformance Setup user. Only the creator of the Notification IDs can see and run them.

    ePerformance delivers a data conversion AE program (PODC28172039) that gets run automatically when the change package for update image 28 is applied. This program loads a total of three generic email templates and 33 Notification IDs to your production environment.

    These email templates are used for composing courtesy, warning, and critical email reminders.

    Each notification ID represents a unique combination of due date type, alert type, and user role. It identifies the recipients, email template, and delivery options used to create due date notifications.

    Refer to the Due Date Notifications red paper (ID: 2420910.1) for more setup information pertaining to this feature.

4. Review text catalogs for subject lines and body texts that appear in email reminders.

    The system delivers text catalog entries to be used as subject line and body text in email notifications for all supported user roles, due date and alert types. The text ID for these entries start with *ALERT_*, and can be modified as needed. Each email body text catalog contains tokens (or bind variables), which are placeholders of actual content from the associated document to be rendered and displayed in the final email reminder. Refer to Text Substitution for Due Date Notifications and Delivered Email Text Entries for Due Date Notifications for lists of system-delivered tokens and text catalogs for due date notifications.

5. Update the *EP_DUEDATE_EMAIL* URL identifier on the URL Maintenance page (URL_TABLE):

    ```
    [your app server URL]/EMPLOYEE/HRMS/c/
    ```

    The system uses this URL identifier to build the link (represented by %7 in the email body) in the email that transfers the recipient to the corresponding document in PIA.

    For more information about the URL Maintenance page, refer to the Using Administration Utilities topic in *PeopleTools: System and Server Administration*.

6. Set up the HR Notification framework to support the Due Date Notifications feature.

The setup of the framework consists of a number of steps:

a. Enable HR Notification on the "Installation Settings Page" (PeopleSoft HCM 9.2: Application Fundamentals).

b. Review the recipient type for this feature using the Specify Recipient Type Information (HCSC_RCPNT_SETUP) component.

    The system delivers the *EP_DUEDT* recipient type, which is used in the recipient lookup when creating HR Notification IDs or composing due date notifications.

    See Also "Specify Recipient Type Information Page" (PeopleSoft HCM 9.2: Application Fundamentals)

c. Review email templates on the "Generic Template Definition Page" (PeopleSoft 9.2: Approval Framework).

    The system delivers three generic email templates that are ready for use: EP_COURTESY_EMAIL, EP_WARNING_EMAIL, and EP_CRITICAL_EMAIL. You can modify the sender and the sender's email address (the From address) in these template definitions if needed.

    For more information about the Generic Template Definition page, see the Defining Generic Templates topic and Defining Notification Templates topic in *PeopleTools: Workflow Technology*.

d. Verify that email templates were loaded successfully to the system on the "Configure Email Template Page" (PeopleSoft HCM 9.2: Application Fundamentals).

    For the notification feature to run properly, do not modify template information on this page.

    Here is an example of an email template used for composing due date reminders:

Image: Email Template Example for Due Data Notifications

This example illustrates the an email template example used for due data notifications.

e. Verify that HR Notification IDs were loaded successfully to the system on the "HR Notification Page" (PeopleSoft HCM 9.2: Application Fundamentals).

    Do not modify these notification IDs.

    Here is an example of an HR notification drafted for a due date email reminder:

Image: HR Notification Example of a Due Date Email Reminder

This example illustrates the HR notification draft of a due date email reminder.

f. Schedule a run control to run the HCSC_ANN process on your preferred schedule (daily, weekly, and so on) on the Process Notifications page (HCSC_NOTIF_RC).

The HCSC_ANN process picks up all recurring HR Notification IDs in the system for processing.

Chapter 7

Working with Desktop Integration

Understanding Desktop Integration with ePerformance

To be evaluatedDesktop Integration is a common framework that orchestrates integration between Microsoft Office products and PeopleSoft application. ePerformance adopts this framework and provides two features around the integration with Microsoft Outlook:

• Ability to add email content from Outlook directly to documents as performance notes in PeopleSoft.

• Ability to track multiple dates in evaluations (documents) in PeopleSoft as tasks in Outlook.

New ePerformance Features in HCM 9.2

Adding Email Content as Performance Notes

During the evaluation process, managers enter notes to record performance information about their direct reports or people whom they are reviewing, and employees do so for themselves. In addition to being able to enter the notes manually by clicking the Performance Note icon in the PeopleSoft system, they can also insert performance notes from email messages in their Outlook applications.

Using the PeopleSoft menu add-in that is loaded as part of Outlook, users can add email content as performance notes for themselves (employees) or employees they select (managers).

Performance notes that are created through the Outlook integration are similar to the ones created in the PeopleSoft system. They both have a character limit of 8095 characters (Outlook content exceeding this limit is truncated) and support only plain text (rich text formatting, special characters and images in Outlook content are removed). For each note that is inserted from Outlook, the system appends the *Sent from Outlook* phrase at the end of the note.

Email attachments from Outlook are not supported; in other words, they are not available as part of performance notes.

See Inserting Performance Notes from Outlook.

Tracking Evaluation Action Items as Outlook Tasks

With the availability of mid-period evaluation in which an employee's progress can be tracked in various checkpoints, ePerformance provides a way to help managers and employees manage numerous due dates in their evaluations in the form of Outlook tasks.

The system sends data to Outlook to create tasks for employees and managers at various points in the performance process. Below are the events that trigger the various tasks to be sent to Outlook:

• The document is created.

- If the manager, employee, or both can update the final criteria document (as specified on the Process page of the template definition for the document), the system sends them a task for the criteria approval due date.

- Both the manager and employee receive tasks for each checkpoint due date, if they are allowed to update checkpoints (as specified on the Process page of the template definition for the document).

  Specifically, the manager receives a task for each checkpoint due date. The employee also receives a task if they have comments enabled in the role rules setup.

- If the manager, employee, or both are authorized to complete the Track Progress step, the system sends them a task for the track progress completion due date.

- User begins the evaluation in the manager evaluation (or complete self evaluation) step.

  The system sends a task for the evaluation due date to each user who can update the evaluation (as specified on the General page of the template definition for the document).

- User accepts a nomination request on the Pending Evaluation Requests page and a feedback document is created.

  The system sends the nominee a task for the evaluation due date.

An Outlook task contains this information:

- Subject

  Subject text includes the role and name of the step in the appraisal process.

- Status

  The initial value is N, which stands for *not started*.

- Priority

  Valid values are High, Normal, and Low. The default priority for new tasks is *High*.

- Due Date

  This value is calculated using the due date setup from the template definition for the corresponding step.

- Reminder Date

  This value is calculated by subtracting the numeric value that is specified in the Reminder Days before Period End Date field on the ePerformance page from the due date.

- Message Body

  The email body include a secure URL to transfer user back to the associated document in ePerformance.

The system updates the status of tasks when these events occur:

- When user clicks to complete a mid-period, final criteria or evaluation document, the status of corresponding tasks for the manager and employee will be set to *Complete*. For evaluation documents, the status change applies to all roles.

- When manager cancels an evaluation document for an employee, the status of corresponding tasks for all roles will be set to *Deleted*.

Setting Up Desktop Integration with ePerformance

Here are the high-level steps for setting up the Desktop Integration framework to support the Outlook integration functionality in ePerformance.

For the PeopleSoft system:

1. Installation option (one for each Outlook integration functionality) is enabled on the ePerformance Installation page.

   See Defining System Settings.

2. Desktop integration is set up and configured. Verify that:

   - Users can access the PeopleSoft system using secure connections (https).

   - Integration Broker is running on the application server that you use for the PeopleSoft system.

3. Users who take advantage of the Outlook integration functionality are given the *EODI_RemoteUser* role.

For more information on the setup details, see "Setting Up Desktop Integration" (PeopleSoft 9.2: Integration Interfaces).

For users:

1. Microsoft Outlook 2007 is installed.

2. The Microsoft add-in for Outlook is loaded to the Outlook application.

3. Settings and options for the PeopleSoft menu are configured properly for the integration.

For more information on user setup, see "Using the PeopleSoft Outlook Menu" (PeopleSoft 9.2: Integration Interfaces).

Chapter 8

Generating Documents

Understanding Document Generation

This section discusses:

- Document generation process.

- Document cloning.

- Document content.

- Initializing from profiles.

Document Generation Processes

Document generation initiates the evaluation process. The process for generating a document varies, depending on the role of the person that is generating the document. The process culminates in the creation of a document based upon template definition rules used to create the document.

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

This diagram shows the document generation process for HR administrators, managers, and employees:
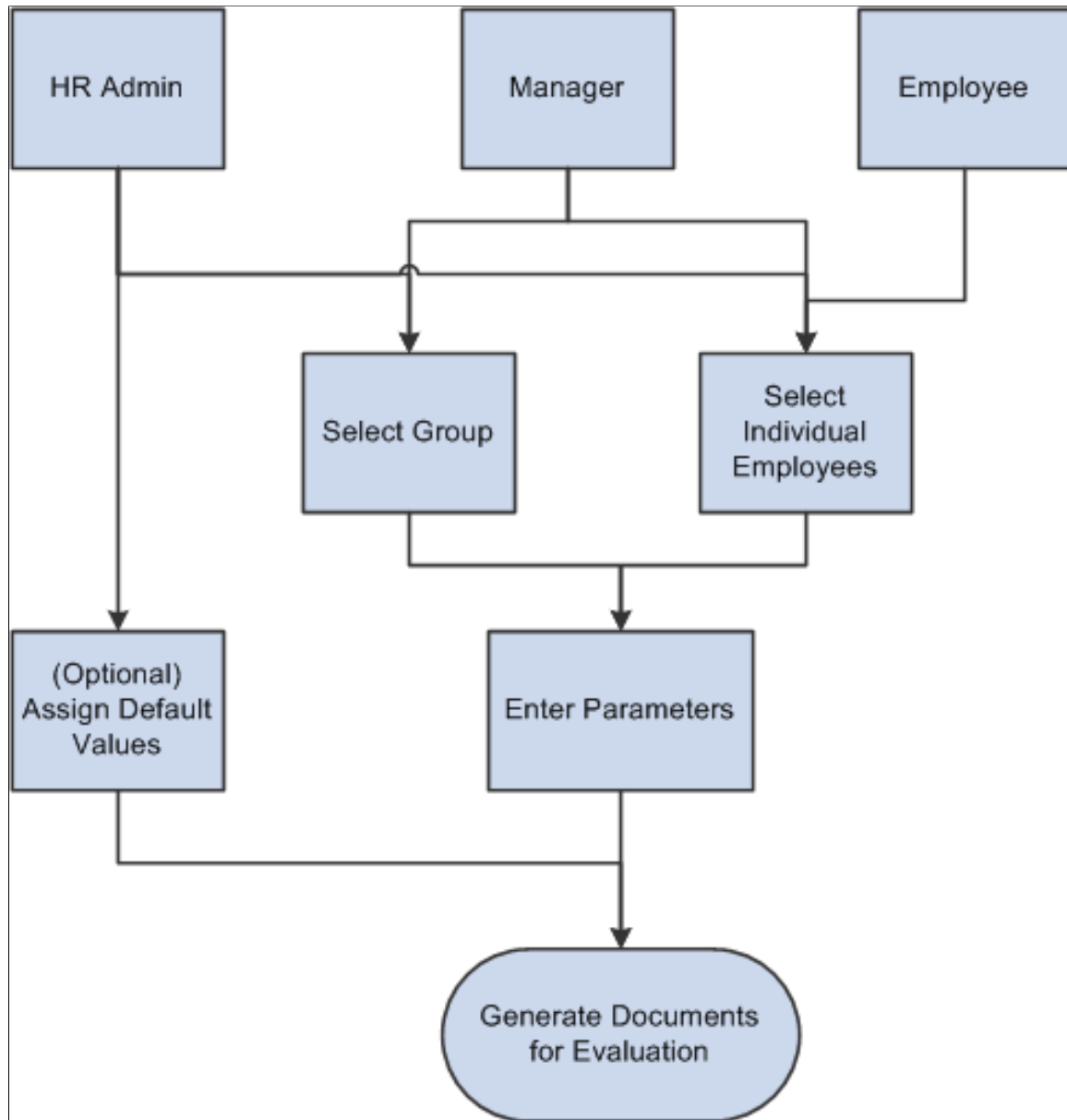
Each of the three roles that can generate documents does so in slightly different ways:

- HR Administrators schedule a background process and select one or more employees or employee groups. They can also define default values (document type and the evaluation period) that get populated when users are about to create documents.

- Managers can select one employee group that reports to them and select one or more employees from the group, or just select one or more employees that report to them.

- Employees can only generate documents for themselves.

After the individuals are identified, the process initiator must select the parameters for the document. These include the document type, document template, and evaluation period that is covered. The language

code might be required, depending on the installation settings. For employee-initiated documents, if the employee has more than one job, the job title is required. The employee might also need to select a manager or mentor for the evaluation, if specified for the document type.

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

- Is Define Criteria enabled?

- Is Track Progress enabled?

- Is Nominate Participants enabled?

Based on the rules established by the document type and document template, the system generates a document for use in the evaluation process. This document is presented using the WorkCenter framework, which reduces the number of user clicks, offers better insight into the performance process and provides users with easy access to other performance information without having to leave the current performance document they are working on.

See Understanding ePerformance WorkCenter.

Cloning Documents

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

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

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

Document Content

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

Initializing From Profiles

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

If Initialize from Profile is selected, the system:

1. Identifies the profile type entered in the Profile Type field in the Profile Management group box on the Template Definition - Structure page.

2. Identifies all profile IDs associated with the profile type.

3. Identifies all the profile identity options and keys associated with the profile IDs.

4. Orders those profile-identity options according to the sequence defined on the Profile Identity Options - Configuration page.

5. Identifies the employee job information record.

6. Looks at the first profile identity option in the sequenced list to see if there is data for that item in the employee's job information record that matches the key.

   a. If there is a match, the system adds the associated content items from the profile ID to the document.

   b. If there is no match, the system checks the next profile identity option in the sequenced list.

   c. If it is the end of a sequenced list, the system stops the process.

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

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

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

Understanding ePerformance Related Actions

Related actions are action links that are accessible on application pages in the form of pop-up menus. These related actions menus are available at convenient locations to provide users quick access to actions that support and extend PeopleSoft transactions. PeopleSoft HCM delivers a number of related actions for Manager Self Service as well as Employee Self Service for different modules and applications. All or a subset of these related actions are being initiated from Org Chart Viewer, Manager Dashboard, Talent Summary and PeopleSoft Search.

In ePerformance, related actions are delivered for managers and employees to create and view performance and development documents.

Note: Current documents are *in progress* documents that are not in the *Canceled* or *Completed* status.

This table lists the performance management actions and where they are available to manager and employee role users as related actions:

Available to Role	*Supported Related Action*	*Available In*
Manager	• Create Performance Document • Create Development Document • Open Performance Documents • Open Development Documents	• Manager Dashboard • Talent Summary • Org Chart Viewer • PeopleSoft Search results • Manger Self Service transactions where related actions are supported
Employee	• Create My Performance Document • Create My Development Document • My Current Performance Documents • My Current Development Documents	Org Chart Viewer (when viewing self record)

These screenshots show the list of ePerformance relation actions that are initiated from Manager Dashboard (for managers) and Org Chart Viewer (for employees):

Image: Accessing Performance Management Related Actions as a Manager

This example shows the performance management related actions for a manager.

Image: Accessing Performance Management Related Actions as an Employee

This example shows the performance management related actions for an employee.

Clicking the *Open Performance (or Development) Documents* related action transfers you to the Performance (or Development) Documents page where you select the document you want to use. The system opens the document in edit mode if you are the owner of the document and the document is not in the *Canceled* or *Completed* status. However, if you are not the owner of the document, or the document is either canceled or completed, the system opens the document in view-only mode.

For employees who access their own documents by clicking the *My Current Performance (or Development) Documents* link, the page title is changed to *Current Performance (or Development) Documents*.

Delegated Documents

Delegation is not supported in related actions. In other words, managers cannot open and edit documents that are delegated to them through the related action functionality. To update the documents of which they are the delegated manager, they need to access the documents using the Manager Self-Service menu navigation.

For a manager to be able to edit a current document of an employee through related actions, the manager needs to be the direct or indirect manager of the employee, and must be listed as the manager of that document.

A manager can view a document of an employee through related actions if the manager is the direct or indirect manager of the employee.

Prerequisites for Generating Documents

Before generating documents, you must:

1. Define templates.

2. Identify the template source on the Document Type page.

3. (Optional) Define group IDs.

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

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

   ---

4. Connect employees to managers in PeopleSoft HR.

5. (Optional) Update the profile function in the Final Evaluation Step - Role Rules grid on the Template Definition - Structure page.

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

   See "Understanding the Transformation Framework" (PeopleSoft HCM 9.2: Application Fundamentals).

6. Set up notifications on the ePerformance Installation page.

7. (Optional) Assign document default values.

   The system populates document default values on the pages where documents are created so users don't have to type in the document type and date range. Default values can be overridden as needed.

   See Assigning Document Defaults.

See Creating Document Templates.

See Defining Document Types.

See "Setting Up Group Definitions" (PeopleSoft HCM 9.2: Application Fundamentals).

See "Understanding Job Data" (PeopleSoft HCM 9.2: Human Resources Administer Workforce).

See <u>Defining System Settings</u>.

Assigning Document Defaults

This topic discusses how to assign document defaults.

Page Used to Assign Document Defaults

Page Name	Definition Name	Usage
Assign Document Defaults Page	EP_DEFAULT	Enter the default values for the document type and evaluation period on the Create <Performance or Development> Documents page.

Assign Document Defaults Page

Use the Assign Document Defaults page (EP_DEFAULT) to enter the default values for the document type and evaluation period on the Create Documents page.

Navigation

Set Up HCM >Product Related >ePerformance >Document Structure >Assign Document Defaults >Assign Document Defaults

Image: Assign Document Defaults page

This example illustrates the fields and controls on the Assign Document Defaults page.

Use this page to enter default values for use in a number of ePerformance transactions. When a supported transaction is initiated, the system prepopulates the default values that are specified for it.

Transaction Name   Select the type of ePerformance transaction for which the default values are specified.

Values are:

- *Create Documents*—Default values are used to create ePerformance documents in the PeopleSoft Classic User Interface.

- *My Team*—Default values are used when retrieving performance data for the "My Team – Performance Page" (PeopleSoft HCM 9.2: eProfile Manager Desktop).

- *Performance Status Chart*—Default values are used for launching the "My Team's Performance Status Pagelet" (PeopleSoft HCM 9.2: eProfile Manager Desktop) for the first time.

Document Type, **Period Begin Date**   Specify the document type and evaluation period for use in the
and **Period End Date**   selected transaction.

Generating Documents as an Administrator

This topic provides an overview on administrator document generation and discusses how to generate documents as an administrator.

Pages Used to Generate Documents as an Administrator

Page Name	*Definition Name*	*Usage*
Create Documents Page	RUNCTL_EPMGRDOC	Schedule a background process to generate documents for individual employees or a group of employees using the group ID.
View Document Creation Results Page	RUNCTL_EPMGRDC_INQ	View documents that were created by the background process.

Understanding Administrator Document Generation

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

Create Documents Page

Use the Create Documents page (RUNCTL_EPMGRDOC) to schedule a background process to generate documents for individual employees or a group of employees using the group ID.

Navigation

- (Fluid) Select the Talent Administrator home page and click the Performance Administration tile. On the left navigation, select Documents >Create Documents.

- (Classic) Workforce Development > Performance Management > Performance Documents > Create Documents > Create Documents

- (Classic) Workforce Development > Performance Management > Development Documents > Create Documents > Create Documents

Image: Create Documents page

This example illustrates the fields and controls on the Create Documents page.

Run Request Parameters

Period Begin Date and **Period End Date**	Enter the beginning and ending date of the period of time that the document covers.
	The system prepopulates these fields with default values that are specified on the Assign Document Defaults page, if available.
	See <u>Assigning Document Defaults</u>.
Document Type	Enter a document type such as *Performance Document, Performance Plan,* or *Annual Review.* You define document types using the Document Type component.
	The system prepopulates this field with the default value that is specified on the Assign Document Defaults page.
	See <u>Assigning Document Defaults</u>.

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

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

Values are:

- *By Department Manager ID:* The system retrieves a manager based on the department of the employee, using the Manager ID field on the Department Profile page.

- *By Group ID:* The system retrieves the manager from the Manager ID field on the Group Profile page.

- *By Manager ID:* If you select this option, you must specify the manager ID in the Manager ID field.

- *By Part Posn Mgmt Dept Mgr ID:* The system searches for a Reports To relationship between managers and employees, and then uses the *By Department Manager ID* selection method if a Reports To ID is not found.

- *By Part Posn Mgmt Supervisor:* The system searches for a Reports To relationship between managers and employees, and then uses the *By Supervisor ID* selection method if a Reports To ID is not found.

- *By Reports To Position:* The system retrieves the manager of the employee's position that is specified in the Position Data component.

- *By Supervisor ID:* The system retrieves the manager based on the Supervisor ID field on the Job Data - Job Information page.

Create Document Using

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

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

Documents Using Group ID – Employee Groups to Process

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

Documents Using Employee ID – Employees to Process

EmplID (employee ID)	Select the employees for which you want to generate documents.
Empl Rcd (employee record)	Specify the employee's record number for which you want to generate documents.
Language Code	Select a language code to generate documents in a different language than the base language of the database. This field is available only when the Allow Language Override check box is selected on the ePerformance Installation page.

Related Links

Defining System Settings
"Understanding Positions" (PeopleSoft HCM 9.2: Human Resources Manage Positions)
"Understanding Group Build" (PeopleSoft HCM 9.2: Application Fundamentals)
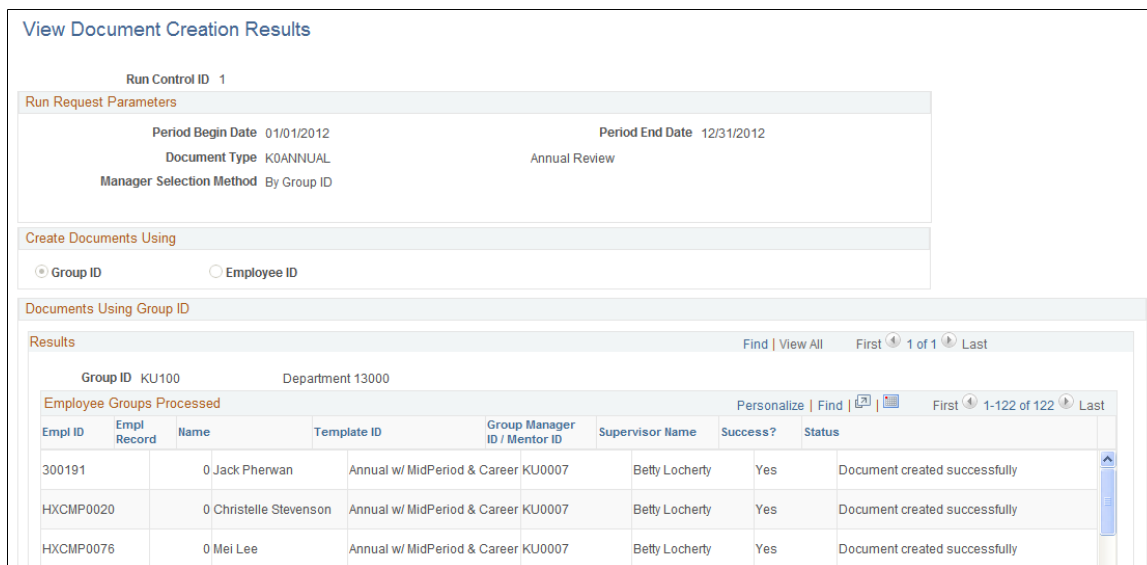
View Document Creation Results Page

Use the View Document Creation Results page (RUNCTL_EPMGRDC_INQ) to view documents that were created by the background process.

Navigation

Workforce Development > Performance Management > View Document Creation Results > View Document Creation Results

Image: View Document Creation Results page

This example illustrates the fields and controls on the View Document Creation Results page.

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

Generating Documents as a Manager

This topic provides an overview of the document generation process for direct reports and discusses how to generate documents as a manager.

Pages Used to Generate Documents as a Manager

Page Name	Definition Name	Usage
Create <Performance or Development> Documents - Select Group Page	HR_DR_DIRECTREPORT	Select a group of employees for whom you want to create documents.
Create <Performance or Development> Documents - Employee Selection Criteria Page	HR_DR_DIRECTREPORT	Select individual employees for whom documents are created.
Create <Performance or Development> Documents - Document Creation Details Page	EP_CREATEAPPR_MGR	Select the document template and dates that you want to use to create documents.
Create <Performance or Development> Documents - Results Page	EP_CREATE_RESULTS	View the document creation results for the employees or group that you selected.

Understanding Document Generation

In the manager role, you can generate documents for direct reports by selecting a group, employees within groups, or individual employees.

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

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

Create <Performance or Development> Documents - Select Group Page

Use the Create <Performance or Development> Documents - Select Group page (HR_DR_DIRECTREPORT) to select a group of employees for whom you want to create documents.

Navigation

- Manager Self-Service >Performance Management >Performance Documents >Create Documents by Group >Create Performance Documents

- Manager Self-Service >Performance Management >Development Documents >Create Documents by Group > Create Development Documents

Image: Create <Performance or Development> Documents - Select Group page

This example illustrates the fields and controls on the Create <Performance or Development> Documents - Select Group page.

Select a group of employees on this page. Click the Continue button at the bottom of the page to move to the next step where you further select one or more employees within that group for which documents are to be created.

Create <Performance or Development> Documents - Employee Selection Criteria Page

Use the Create <Performance or Development> Documents - Employee Selection Criteria page (HR_DR_DIRECTREPORT) to select individual employees for whom documents are created.

Navigation

* Manager Self-Service >Performance Management >Performance Documents >Create Documents >Create Performance Documents

* Manager Self-Service >Performance Management >Development Documents >Create Documents >Create Development Documents

* Select a group on the Create <Performance or Development> Documents - Select Group page.

Image: Create <Performance or Development> Documents - Employee Selection Criteria page

This example illustrates the fields and controls on the Create <Performance or Development> Documents - Employee Selection Criteria page.

If you select to create documents for individual employees, this is the first page in a series of pages that guide you through the document generation process. If you select to create documents by group, this page appears after a group is selected.

The system populates the list of employees whom you can create documents for based on the effective date entered on this page. Select one or more employees and then click the Continue button at the bottom or top of the page. If you have selected a group prior to accessing this page, the as of date is not available for edits.

Find Employee	The Find Employee link above the header grid enables you to select from the same list of direct and indirect reports as if you expanded all nodes.

To search within your direct reports organization, click the Find Employee link. Enter criteria on the Find Employee page (HRDR_SRCH_EMPS_SEC), and then click Search. Select an employee to open in the transaction.

The Find Employee link appears only when the transaction applies to individuals. It does not appear for transactions where you select groups of individuals until you get to the point where you select individuals in that group.

Note: The Direct Reports UI setup determines which employees are available for selection and which fields appear on the <Application Context> - Employee Selection Criteria page. See "Configuring Direct Reports Functionality" (PeopleSoft HCM 9.2: Application Fundamentals)

⊞ Expand

Click the Expand icon to view a list of employees that report to the manager whose name appears on the left side of the list.

HR Status

The HR Status field appears on the Employee Selection Criteria page only if the Allow Indirect Reports check box is selected on the Direct Report Transaction Configuration page.

Inactive employees can have active employees reporting to them directly or indirectly.

Create <Performance or Development> Documents - Document Creation Details Page

Use the Create <Performance or Development> Documents - Document Creation Details page (EP_CREATEAPPR_MGR) to select the document template and dates that you want to use to create documents.

Navigation

- Select one or more employees or a group of employees and click the Continue button on the Create <Performance or Development> Documents - Employee Selection Criteria page.

- Org Chart Viewer

  Search for a person from the Company Directory, Direct-Line Reports, or Business Continuity page. From the person's Actions list, select Performance Management and then Create <Performance or Development> Document.

- Talent Summary

  Search for a person. From the person's Actions list, select Performance Management and then Create <Performance or Development> Document.

- Manager Dashboard

  Click to expand the Action list of a direct report, select Performance Management and then Create <Performance or Development> Document.

- Select Performance Management and then Create <Performance or Development> Document from a PeopleSoft Search result.

Image: Create <Performance or Development> Documents - Document Creation Details page

This example illustrates the fields and controls on the Create <Performance or Development> Documents - Document Creation Details page.

To enter the parameters:

1. Enter the time period for the document.

2. Enter the document type.

    The system populates the period and document type if default values are defined on the Assign Document Defaults page.

3. If Clone Existing Document is selected on the Document Types page, select whether the document is to be created for an existing document. If you select *Yes,* select the document to clone.

4. If Clone Existing Document is not selected on the Document Types page or *No* is selected in the Create from Prior Document, select the template from which the documents will be created.

5. Click the Create Documents button.

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

Create <Performance or Development> Documents - Results Page

Use the Create <Performance or Development> Documents - Results page (EP_CREATE_RESULTS) to view the document creation results for the employees or group that you selected.

Navigation

Click the Create Documents button on the Create <Performance or Development> Documents - Document Creation Details page.

Image: Create <Performance or Development> Documents - Results page

This example illustrates the fields and controls on the Create <Performance or Development> Documents - Results page.

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

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

Generating Documents as an Employee

This topic discusses how to generate documents as an employee.

Page Used to Generate Documents as an Employee

Page Name	Definition Name	Usage
Create <Performance or Development> Documents Page	EP_CREATEAPPR_EE	Enter parameters for generating documents as an employee.

Create <Performance or Development> Documents Page

Use the Create <Performance or Development> Documents page (EP_CREATEAPPR_EE) to enter parameters for generating documents as an employee.

Navigation

•   Self Service > Performance Management > My Performance Documents > Create Documents > Create Performance Documents

•   Self Service > Performance Management > My Development Documents > Create Documents > Create Development Documents

•   Company Directory

    Search for a person from the Company Directory, Direct-Line Reports, or Business Continuity page. From the person's Actions list, select Performance Management and then Create Performance Document.

Image: Create <document type> Documents page (employee)

This example illustrates the fields and controls on the Create <document type> Documents page (employee).

Period Begin Date and **Period End Date**	Enter the beginning and ending dates of the evaluation period.
Document Type	Select the type of document to generate. Valid document types are defined on the Document Types page. The system populates the period and document type with default values that are defined on the Assign Document Defaults page, if available.
Create from Prior Document	Select Yes if you want to clone an existing document. Select No if you do not want to clone an existing document.

This field appears if the Employee check box is selected for the Clone Process field on the Document Types page.

Note: If you select the same period and document type as an existing document and you try to clone it, the system issues a validation error and stops the cloning process.

Prior Document   Select an existing document from which you want to clone a copy.

                                        This field appears if you select *Yes* in the Create from Prior Document field.

Template   Select the document template from which to generate the documents. Document templates are created in the Document Template component.

                                        This field appears if you select *No* in the Create from Prior Document field.

Select a Manager   Click to access the Person Search page where you can search for and select the person who will act in the manager role for this evaluation.

                                        This field appears if the Employee can Select Manager check box is selected on the Document Types page.

Select Job   Select the job for which the document is generated.

                                        This field appears if the employee has multiple jobs.

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

Accessing Documents

This topic provides overviews of ePerformance WorkCenter and discusses how to access documents.

Pages Used to Access Documents

Page Name	Definition Name	Usage
Current <Performance or Development> Documents Page or <Performance or Development> Documents Page	EP_APPR_SELECT	Select performance or development documents to view or edit. Related actions are available from Manager Dashboard, Talent Summary, Company Directory, PeopleSoft Search results, and other Manager Self Service transaction pages that support related actions.
Define Criteria Page Checkpoint <#> Page Finalize Criteria Page	EP_APPR_BASE1	Perform business process tasks that are specific to the Define Criteria or Track Progress business processes on documents.
Nominate Participants - Add Nominees Page	EP_APPR_NOM_BUILD	Add participant nominations to documents.
Nominate Participants - Track Nominations Page	EP_APPR_NOM_TRACK	Track participant nominations submitted for documents.
<Manager or Self-> Evaluation Page Evaluation Page	EP_APPR_MAIN1	Evaluate documents.
Overview Page	EP_APPR_HELP	View the list of steps included in the process and their descriptions.

Understanding ePerformance WorkCenter

To help users gain better insight into the performance process and provide them with quick and easy access to information without having to leave the current documents that they are working on, ePerformance leverages the WorkCenter framework functionality and presents performance documents in a guided, status-driven manner. The WorkCenter approach consists of two parts:

- Pagelet on the left serves as an activity center for the user, showing where the user currently is in the process and which steps and tasks have been or yet to be attempted along with status.

- Component page in the transaction area on the right corresponds to the current step that the user is on, as highlighted on the pagelet on the left.

  The user views and updates information on this page as the evaluation progresses. The title of the page shows the step on the left pagelet that it corresponds to and the action that the user can perform on it (if the option to concatenate page title is enabled in the template definition), which gives the user clear information on the current step and what he or she is about to do.

Employees, managers and administrators update and view all current and historical documents (both performance and development) through WorkCenter. This sample screenshot displays how the Finalize Criteria step of a performance process is presented in the WorkCenter framework:

Image: Finalize Criteria page displayed in WorkCenter

This example shows the Finalize Criteria page as displayed in WorkCenter.
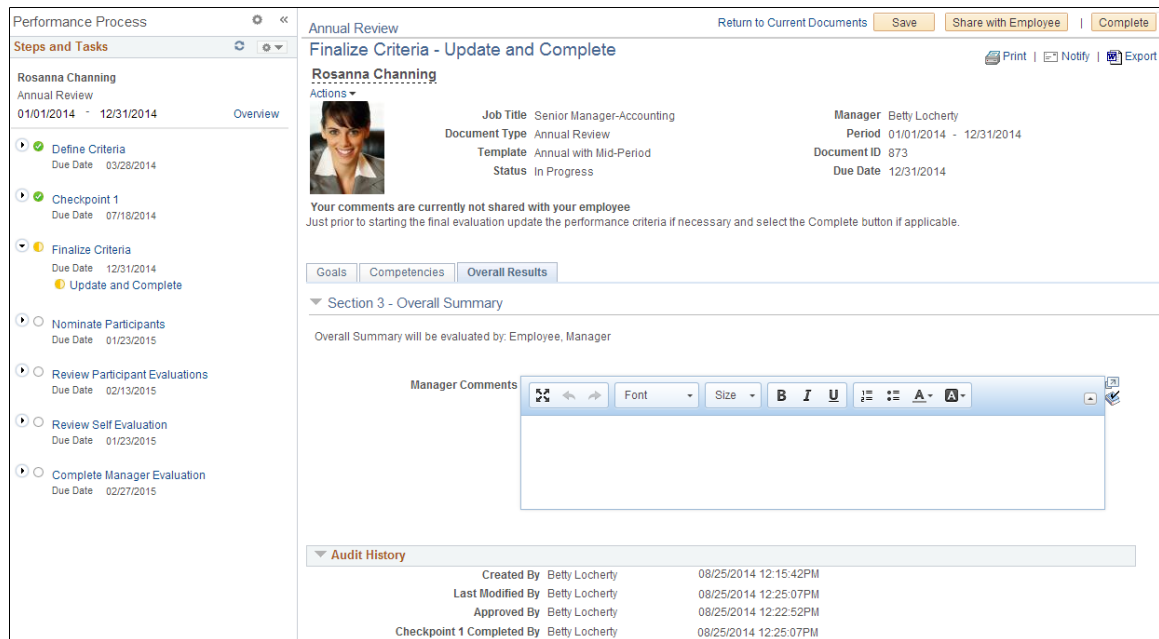
(Left) Steps and Tasks Pagelet

This pagelet displays all the steps included in the type of the document currently opened. The top of the pagelet contains standard WorkCenter options that are used by end-users to personalize and configure WorkCenter behaviors.

Next, information that is specific to the evaluation is displayed. It includes basic information (employee, document type and review period) and the list of steps and sub-steps that the user needs to complete for the evaluation. When the user opens a document, the system highlights the current step that the user is on in the process and what action the user is supposed to perform. The user can click the Overview link to view the list of steps included in the process and a high-level description for each one of them.

(Right) Transaction Area Displaying Component Page

The page displayed here corresponds to the action link that the user has just clicked on the current step. Available pages include Define Criteria, Checkpoint <#>, Finalize Criteria, Nominate Participants, Review Participant Evaluations, Complete (or Review) Self Evaluation, Complete Manager Evaluation pages depending on the user viewing the document, as well as the business processes enabled in the document template.

The component page contains these information and page controls:

Header Area:

• Type of the document currently opened.

• Page title with corresponding step name and action that users take.

  If the option to concatenate page title is enabled, the page title displays both the step and action. If the option is disabled, only the step is shown.

- Employee name that when hovered over, displays a pop-up page that provides basic job and contact information about the employee.

- Related actions available to the employee. Clicking the Actions field displays the related actions menu, providing quick access to major self service transactions available to the employee from one place.

- Employee photo.

  The system displays the employee's picture on document headers if the Display on Self Service option is enabled on the "HCM Options Page" (PeopleSoft HCM 9.2: Application Fundamentals). The system uses the picture from that is available from the HR system for display. If such photo is not available, a dummy picture is used instead.

  If the Allow Employee to Upload Photo option is also enabled on the HCM Options page, the system displays the photo based on the display option (employee's own picture, HR photo, or no photo) selected by the employee on either the Personal Information Summary page or the "Org Chart Viewer - Update Photo Page" (PeopleSoft HCM 9.2: Human Resources Administer Workforce).

  See "Reviewing and Updating Personal Information" (PeopleSoft HCM 9.2: eProfile).

- Primary action buttons that pertain to the current step (Save, Approve, Share with Employee, Complete).

  These actions typically change the document status and move users to the next step. When any primary action button is clicked, a confirmation message appears and the user needs to provide confirmation before the system commits that action.

  Status-related changes that occur here triggers updates to the pagelet so that it always displays the most current document status and the next action that the user should take.

- Common page actions (Print, Notify, Export Document).

  These actions are usually common across performance and development documents.

- Summary information about the evaluation.

Section Area:

- Secondary action buttons pertaining to the document. Their appearance is based on setup, document status and the role of user accessing the document (for example, Check Language, Calculate Rating, Cancel Evaluation, Expand All, Collapse All, TAB format and Long format (if configured to support tabbed and long display).

- Section-level actions (for example, Add Competency, Add Peer, Add Goals, Expand Competency, Collapse Competency, and Business Objective links).

- Item-level actions (Add sub-competencies).

Depending on the document template setup, document sections are displayed in either tabbed format or long format.

ePerformance leverages the WorkCenter design to display documents that are accessed using these navigations:

- (Fluid) Manager Self Service, Team Performance, Current Documents, Current Documents

- (Fluid) Manager Self Service, Team Performance, Historical Documents, Historical Documents

- (Fluid) Employee Self Service, Performance, My Current Documents, My Current Documents

- (Fluid) Employee Self Service, Performance, My Historical Documents, My Historical Documents

- Manager Self Service, Performance Management, Performance Documents, Current Documents.

- Manager Self Service, Performance Management, Performance Documents, Historical Documents.

- Manager Self Service, Performance Management, Performance Documents, View-Only Documents.

- Self Service, Performance Management, My Performance Documents, Current Documents.

- Self Service, Performance Management, My Performance Documents, Historical Documents.

- Workforce Development, Performance Management, Performance Documents, View Documents.

- Manager Self Service, Performance Management, Development Documents, Current Documents.

- Manager Self Service, Performance Management, Development Documents, Historical Documents.

- Manager Self Service, Performance Management, Development Documents, View-Only Documents.

- Self Service, Performance Management, My Development Documents, Current Documents.

- Self Service, Performance Management, My Development Documents, Historical Documents.

- Workforce Development, Performance Management, Development Documents, View Documents.

- Related actions used in various features. Performance Management, Open Performance Documents

- Related actions used in various features. Performance Management, Open Development Documents

See Using the PeopleSoft Fluid User Interface to Work with Documents as Employees and Using the PeopleSoft Fluid User Interface to Work with Documents as Managers for more information on accessing ePerformance documents in fluid mode.

Note: Managers and administrators can also access performance documents from components such as Maintain Succession Plans, Manage Succession Plans, Succession 360, and Approve Documents. Documents are in read-only mode and they are not displayed in WorkCenter.
For more information about the WorkCenter setup in general, refer to "Configuring Pagelets" (PeopleSoft 9.2: Enterprise Components).

PeopleSoft WorkCenters

New ePerformance Features in HCM 9.2

Current <Performance or Development> Documents Page or <Performance or Development> Documents Page

Use the Current <Performance or Development> Documents page or <Performance or Development> Documents page (EP_APPR_SELECT) to select performance or development documents to view or edit.

Navigation

- Manager Self-Service >Performance Management >Performance Documents >Current Documents >Current Performance Documents

- Manager Self-Service >Performance Management >Development Documents >Current Documents >Current Development Documents

- Self-Service >Performance Management >My Performance Documents >Current Documents >Current Performance Documents

- Self-Service >Performance Management >Development Documents >Current Documents >Current Development Documents

- (Related action) Performance Management >Open Performance Documents

- (Related action) Performance Management >Open Development Documents

Image: Current <Performance or Development> Documents page

This example illustrates the fields and controls on the Current <Performance or Development> Documents page.

This screenshot shows an example of the Current Performance Documents page that is accessed from the Manager Self Service menu.

This page is renamed *Performance Documents* when you access the page as a related action. The Filter Criteria section is not available on the page as the employee has already been identified.

Filter Criteria

This section is available on all select document pages that are accessed from Manager Self Service. The filtering capability enables managers to quickly search for and open documents that they need to update or view without having to scroll down or sort on the results grid.

<Performance or Development> Documents

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

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

If you access this page through the Manager Self Service menu, additional columns appear (Employee and Document Status). The grid lists all documents with statuses that are not *Complete* or *Canceled* for which you are the manager. Documents in a *Complete* status are listed on the Historical Documents page. You can filter documents by name, document type, document status and review period.

The same also applies to development documents.

Define Criteria Page

Use the Define Criteria page (EP_APPR_BASE1) to business process tasks that are specific to the Define Criteria business processes on documents.

Navigation

Click to open a document that is in the *Define Criteria* status on the (classic) Current Performance Documents, (classic) Current Development Documents, (fluid) Current Documents, or (fluid) My Current Documents page.

Image: Define Criteria page

This example illustrates the fields and controls on the Define Criteria page.
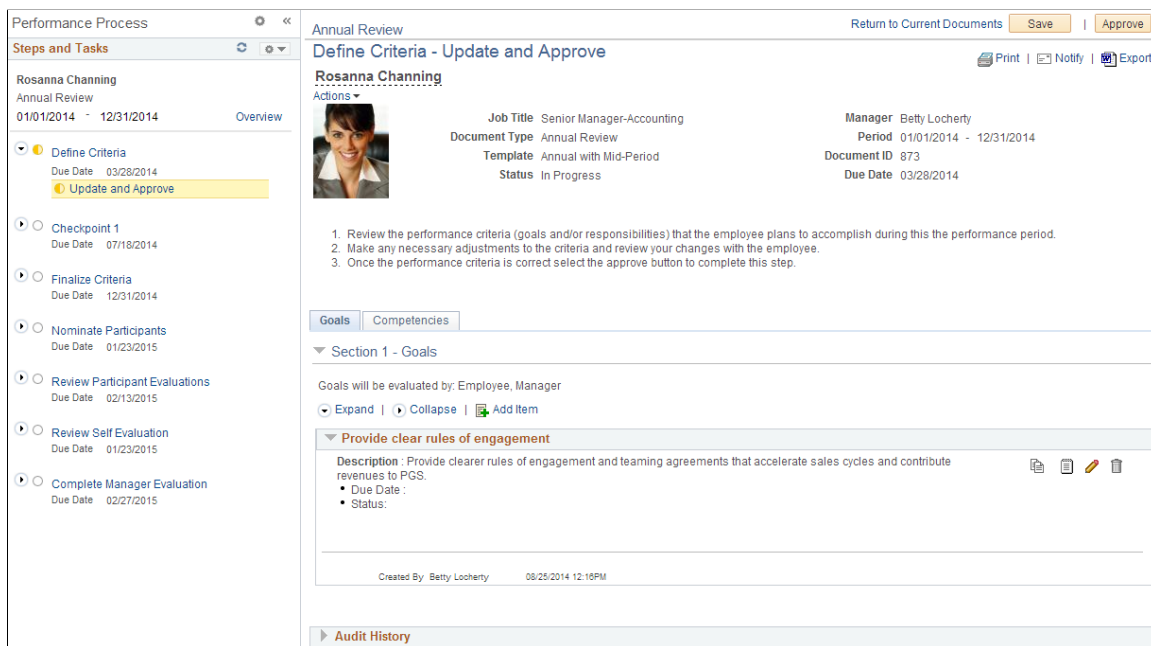
Important! Depending on the business processes that are enabled at the document template level, and the current status of the document, the landing page of the document you see can vary. For example, if the Define Criteria business process is not enabled and the Track Progress business process is enabled with two scheduled checkpoints, you'll see the Checkpoint 1 page as the landing page when you click the document you just created for the first time.

This screenshot shows an example of a landing page for the Define Criteria business process.

Actions	Click to display the list of related actions that are available to the employee. Related actions provide users quick access to major self service transactions from one page instead of through traditional menu navigations.
	"Understanding Related Actions and Self Service Transactions" (PeopleSoft HCM 9.2: eProfile Manager Desktop)
Recent Search Results	Click the Recent Search Results icon to access the next document in WorkCenter without returning to the search page.
	This icon appears on the page navigation across the top of the PeopleSoft Classic User Interface.

Steps and Tasks

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

Expanding a step displays all relevant actions the user can perform in the form of links. For example, clicking the View link of a completed step takes the user to a new browser window to view the information of the completed step in the read-only mode. Similarly, clicking the Reopen link of the Finalize Criteria step refreshes the component page on the right to display the Finalize Criteria document, on which the user can reopen it and change the status of the step from *Completed* back to *In Progress*, allowing the user to make additional updates.

Overview	Click to open a modal page and view the complete list of steps included in this process and details on what participating users are expected to do in each step.
<step link>	Click to expand or collapse a step, which can also be done by clicking the Expand Sub Steps and Collapse Sub Steps icons on the left of the step.
<status icon>	Displays the status of the corresponding step. Click the icon to view the current status of the step as an alternate text.
Complete	Indicates that the corresponding step is completed.
In Progress	Indicates that the corresponding step is in progress.
Started	Indicates that the corresponding step is not yet started.

Canceled	Indicates that the corresponding step is canceled.
<action link within step>	Click to:

- Perform the action on the component page that is displayed on the right.

- (For completed steps) Access the read-only component page in a new browser window.

Transaction Area

For more information on the:

- Define Criteria step, see <u>Understanding Evaluation Criteria Modification</u>.

- Checkpoint and Finalize Criteria steps, see <u>Understanding Mid-Period Checkpoints</u>.

- Nominate Participants step, see <u>Understanding the Nomination and Tracking Processes</u>.

- Self Evaluation (for employee), Manager Evaluation, and Participant Evaluations steps, see <u>Understanding Evaluation Data Entry</u>.

Related Links
<u>Understanding Document Templates</u>
<u>Working with Delegations</u>

Overview Page

Use the Overview page (EP_APPR_HELP) to view the list of steps that are included in the process and their descriptions.

Navigation

Click the Overview link on the Steps and Tasks pagelet of the page.

Image: Overview page

This example illustrates the fields and controls on the Overview page.
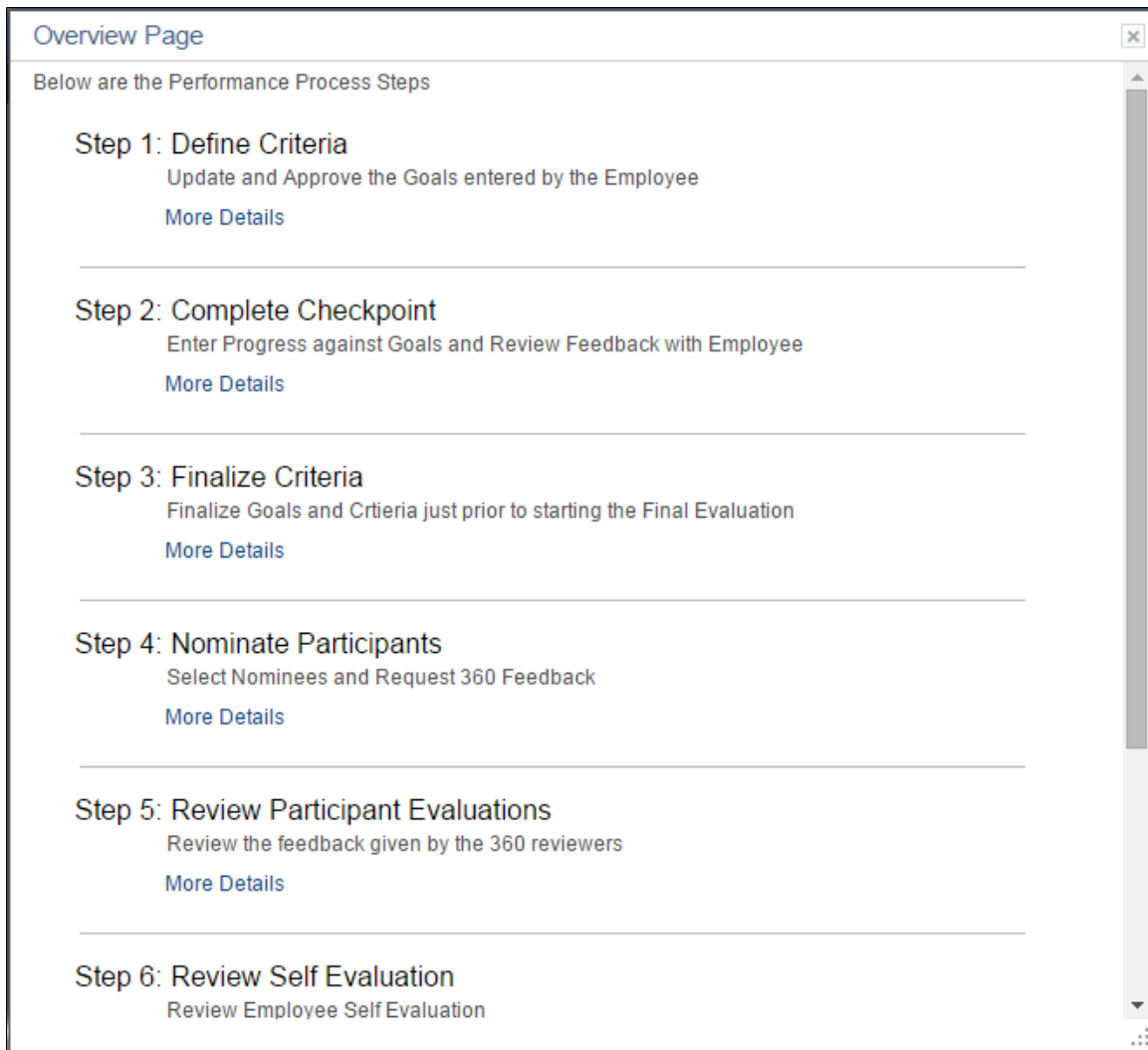
This modal page lists all the steps that are included in the document process. Click the More Details link to view the description of what participating users are expected to do in each step.

Chapter 9

Using the PeopleSoft Fluid User Interface to Work with Documents

Using the PeopleSoft Fluid User Interface to Manage Performance Tasks as Administrators

This topic discusses a list of pages that ePerformance administrators can access from a single place in the PeopleSoft Fluid User Interface to manage templates, documents, profiles, and business objectives.

For general information about fluid pages in PeopleSoft HCM, see "Understanding PeopleSoft Fluid User Interface Home Pages" (PeopleSoft HCM 9.2: Application Fundamentals).

Workforce Administrator and Talent Administrator Homepages - Image Highlights

PeopleSoft Fluid User Interface Experience in HCM

Pages Used to Manage Performance Tasks as Administrators Using the PeopleSoft Fluid User Interface

Page/Tile Name	Definition Name	Usage
Performance Administration Tile	HC_PERF_ADMIN_FL (cref for the tile)	Access administrator-specific pages to manage documents, profiles, and business objectives.
Create Documents Create Documents Page	RUNCTL_EPMGRDOC	Create documents.
Delete Document Delete Documents Page	EP_APPR_SELECT	Delete documents.
Reopen Document Reopen Document Page	EP_APPR_SELECT	Reopen documents.
Transfer Document Transfer Document Page	EP_APPR_SELECT	Transfer documents.

Page/Tile Name	Definition Name	Usage
Cancel Document Cancel Document Page	EP_APPR_SELECT	Cancel documents.
Template Definition Understanding Document Template Setup	EP_TMPL_DEFN1	Define document templates.
Auto Transfer Document Status Auto Transfer Document Status Page	EP_XFER_LOG_FL	View automatic transfer statuses of in-progress documents that were owned by terminated managers.
Non-person Profiles "Non-person Profile Page" (PeopleSoft HCM 9.2: Human Resources Manage Profiles)	JPM_PROFILE1	Create and update non-person profiles.
Person Profiles "Person Profile Page" (PeopleSoft HCM 9.2: Human Resources Manage Profiles)	JPM_PROFILE_PERS	Create and update person profiles.
Search and Compare Profiles "Understanding Search and Compare Profiles" (PeopleSoft HCM 9.2: Human Resources Manage Profiles)	JPM_SRCH_TRANSFER	Select the profile that you want to use as the source of criteria for the search.
Employee Profile Matching "Matching Employee Profiles" (PeopleSoft HCM 9.2: Human Resources Manage Profiles)	CM_PROFILE_SUMM	Match employee profiles.
Manage Business Objectives Manage Business Objectives - Select Objective Plan Page	EPO_PLAN_SELECT	Select an objective plan for update.
Create Objectives Summary Data Create Objectives Summary Data Page	EPO_ALIGN_EXT	Extract data by objective plan that the system will use to generate the Employees Aligned to Business Objectives metric.

Performance Administration Tile

Use the Performance Administration tile (HC_PERF_ADMIN_FL) to access groups of pages to manage templates, documents, profiles, and business objectives.

Navigation

Click the title of the default home page and select *Talent Administrator* from the list that appears. The Performance Administration tile is displayed on the Talent Administrator page.

As an administrator, you can add the tile, through personalization, to a system-delivered home page or a home page that you create.

Image: (Tablet) Performance Administration tile

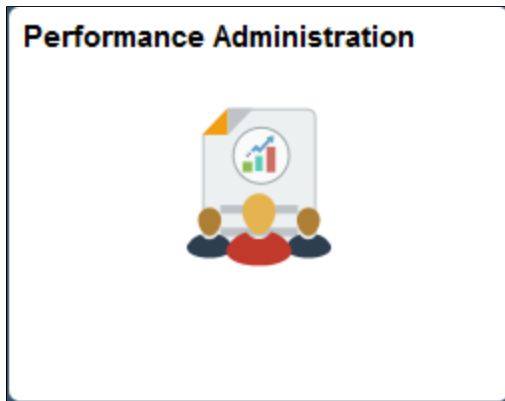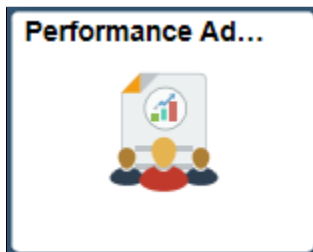This example illustrates the Performance Administration tile (tablet).

**Image: (Smartphone) Performance Administration tile**

This example illustrates the Performance Administration tile (smartphone).

Click the Performance Administration tile to access a collection of administrative transactions for ePerformance from one location.

Image: Performance Administration application start page

This example illustrates the pages that are displayed on the Performance Administration application start page.
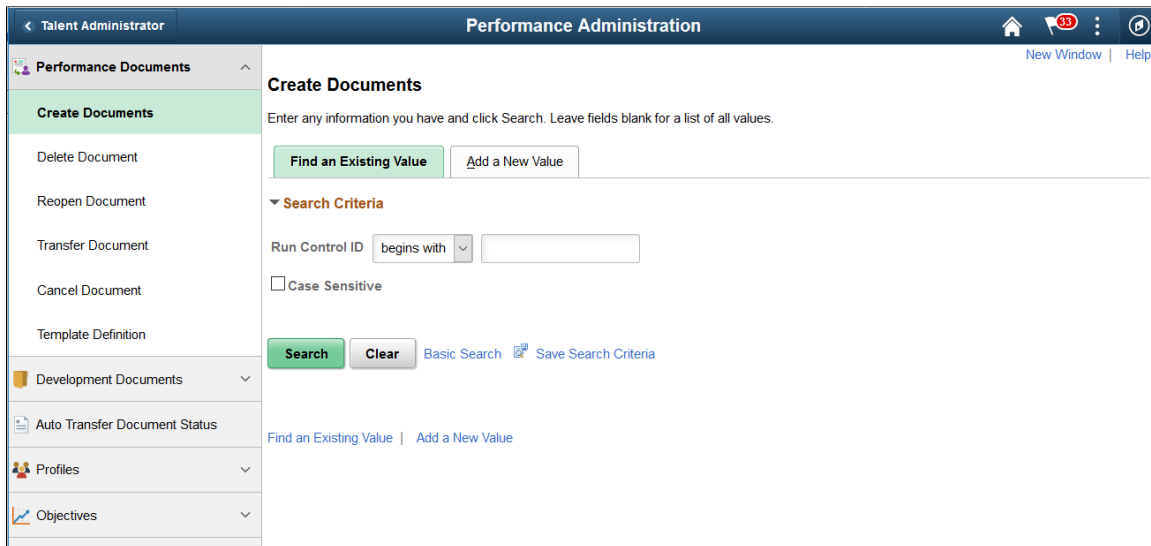
This application start page is a navigation collection that lists the components and pages collected under these categories:

- Performance Documents

- Development Documents

- Auto Transfer Document Status

- Profiles

- Objectives

Using the PeopleSoft Fluid User Interface to Work with Documents as Managers

This topic discusses a list of pages that managers can access from a single place in the PeopleSoft Fluid User Interface to work with documents.

For general information about fluid pages in PeopleSoft HCM, see "Understanding PeopleSoft Fluid User Interface Home Pages" (PeopleSoft HCM 9.2: Application Fundamentals).

PeopleSoft Fluid User Interface Experience in HCM

Image Highlights, PeopleSoft HCM Update Image 29: ePerformance Fluid Administrative Component for Managers

Pages Used to Work with Documents as Managers Using the PeopleSoft Fluid User Interface

Page/Tile Name	Definition Name	Usage
Team Performance Tile	HC_EP_MSS_SELECT _FLU_GBL (cref for the tile) EP_MSS_TILE_FLU (page for dynamic data)	View the total count of current documents that are owned by and delegated to the logged-in manager.
Current Documents Page (Team Performance)	EP_MSS_CURR_FL	Access the current documents that are owned by the logged-in manager.
Select Employee(s) Page	HR_PSEL_FLU	Select employees for whom documents are to be created.
Create Documents Page (Team Performance)	EP_CREATE_MSS_FLU	Enter criteria to be used to create documents.
Delegated Documents Page (Team Performance)	EP_MSS_DELGATE_FL	Access the documents that are delegated to the logged-in manager.
Historical Documents Page (Team Performance)	EP_MSS_HIST_FL	Access completed or canceled documents that are owned by the logged-in manager.
Transfer Documents Page (Team Performance)	EP_MSSADM_SELCT_ FL	Transfer documents to other managers.
Select a Manager Page	HR_PSEL_FLU	Select a manager for the document transfer.
Transfer Documents - Confirmation Page (Team Performance)	EP_MSSADM_CONF_ FL	Review and confirm the document transfer.
Reopen Documents Page (Team Performance)	EP_MSSADM_SELCT_ FL	Change the status of documents that are currently in the evaluation phase back to *Evaluation in Progress*.
Reopen Documents - Confirmation Page (Team Performance)	EP_MSSADM_CONF_ FL	Review and confirm the status change of the selected documents back to *Evaluation in Progress*.
Cancel Documents Page (Team Performance)	EP_MSSADM_SELCT_ FL	Cancel documents.
Cancel Documents - Confirmation Page (Team Performance)	EP_MSSADM_CONF_ FL	Review and confirm the cancelation of selected documents.
Delete Documents Page (Team Performance)	EP_MSSADM_SELCT_ FL	Delete canceled documents.
Delete Documents - Confirmation Page (Team Performance)	EP_MSSADM_CONF_ FL	Review and confirm the deletion of selected documents.
Enter Preliminary Ratings Page (Team Performance)	EP_MSSADM_CONF_ FL	Enter preliminary performance ratings for documents that are currently in progress.

Page/Tile Name	Definition Name	Usage
View-Only Documents - Select Employee Page (Team Performance)	HR_PSEL_FLU	Select employees and review their documents.
View-Only Documents - Document List Page (Team Performance)	EP_MSS_VIEWONLY_FL	View the list of documents for the selected employee.
Create Documents by Group - Select Group Page (Team Performance)	HR_PSEL_GROUP_FL	Select a group of employees for whom documents are created.
Create Documents by Group - Select Employees Page (Team Performance)	HR_PSEL_GROUP_FL	Select employees from the selected group for whom documents are created.
Create Documents by Group - Document Creation Details Page (Team Performance)	EP_CREATE_MSS_FLU	Select the document template and dates that are used to create documents.
Create Documents by Group - Results Page (Team Performance)	EP_CREATE_M_RS_FLU	View the document creation results.
Team Performance Status Tile	HC_EP_DOCSTS_PGLT_FLU (cref for the tile) EP_PG_DOCSTS_FLU (page for dynamic data)	View the performance status of the documents that are owned by the logged-in manager.
Team Performance Status Page	EP_PG_DOCSTS_FLU	View the performance status of the documents in details, and modify chart displays if necessary.
Change Settings Page	EP_PG_CHNG_SET_SCF	Edit the default settings used for launching the Performance Status page.

Team Performance Tile

Use the Team Performance tile (EP_MSS_TILE_FLU) to view the total count of current documents that are owned by and delegated to the logged-in manager.

Navigation

Select the Manager Self Service home page. The Team Performance tile is available on the Manager Self Service landing page.

As a manager, you can add the tile, through personalization, to a system-delivered home page or a home page that you create.

Image: (Tablet) Team Performance tile

This example illustrates the Team Performance tile for the tablet.

Image: (Smartphone) Team Performance tile

This example illustrates the Team Performance tile for the smartphone.

If no documents are available, no information is displayed on the Team Performance tile.

Click the tile to access the Team Performance page and navigate to these manager self-service transactions easily without using traditional menu navigations:

- Current Documents

- Delegated Documents

- Historical Documents

- Administrative Tasks

  - Transfer Documents

  - Reopen Documents

  - Cancel Documents

  - Delete Documents

  - Enter Preliminary Ratings

- View-Only Documents

- Create Documents by Group

Current Documents Page (Team Performance)

Use the Current Documents page (Team Performance) (EP_MSS_CURR_FL) to access the current documents that are owned by the logged-in manager.

Navigation

Click the Team Performance tile on the Manager Self Service page or a home page where the tile is added. The Current Documents page appears as default.
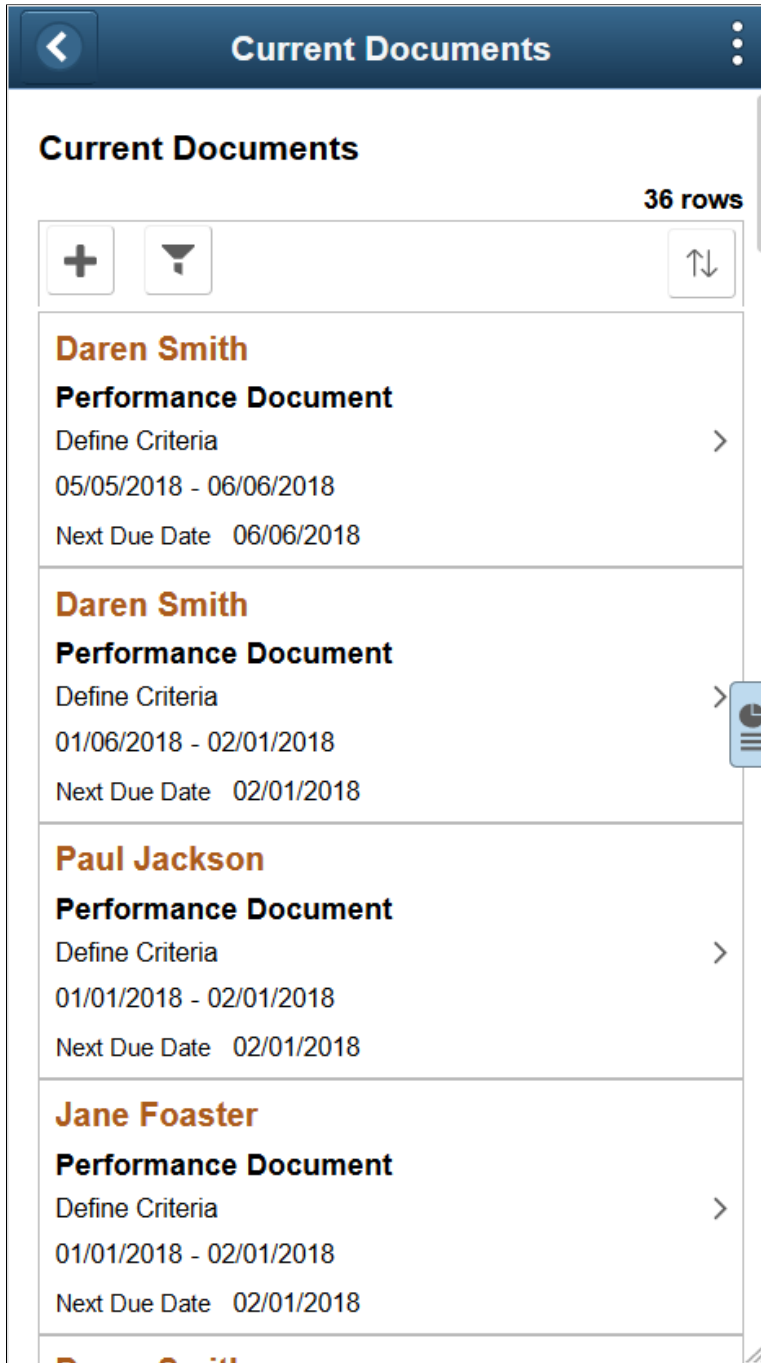
Image: (Tablet) Current Documents page (Team Performance)

This example illustrates the fields and controls on the Current Documents page (Team Performance) for the tablet.

Image: (Smartphone) Current Documents page (Team Performance)

This example illustrates the fields and controls on the Current Documents page (Team Performance) for the smartphone.

(Smartphone) To return to the navigation menu, click the back button on the banner.

The grid on this page lists all current documents (document status is not *Completed* or *Canceled*) that are owned by the logged-in manager, which include both performance and development documents. On the top right corner of the grid, row count is displayed. Information shown in this grid contains most or all of this information:

- Employee name and job title

- Document type

- Document status

- Evaluation period

- Next due date

Click a row to open the corresponding document for edits in the ePerformance WorkCenter. From the WorkCenter, you can click the Team Performance button on the page banner to return to the Team Performance page.

Create Documents or [+]	Click the button to access the Create Document page to create new documents as a manager.
[filter icon]	Click the icon to enter parameters used to filter the list of documents to be displayed. Documents can be filtered by employee name, document type, document status, and evaluation period.
[sort icon]	Click the icon to select a field that the system uses to sort the documents. All column headings that appear on the grid are available for sorting.

Supplementary Panel for the Team Performance Page

If you use PeopleTools 8.57 or later, several Team Performance pages include a supplementary panel that provides access to related information and simplified analytics.

For more information about simplified analytics, see product documentation for *PeopleTools: Pivot Grid*, "Working with Simplified Analytics."

▶ Simplified Analytics - Image Highlights

▶ PeopleSoft Simplified Analytics

Navigation

Click the Supplementary Panel tab on the Current Documents, Delegated Documents or Historical Documents page.

Image: (Tablet) Supplementary panel for Team Performance

This example illustrates the supplementary panel for Team Performance for the tablet.
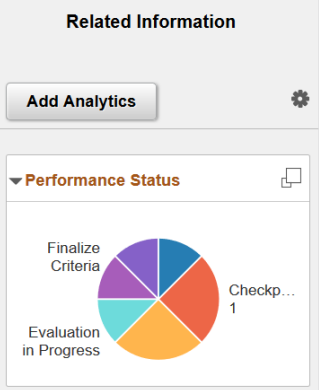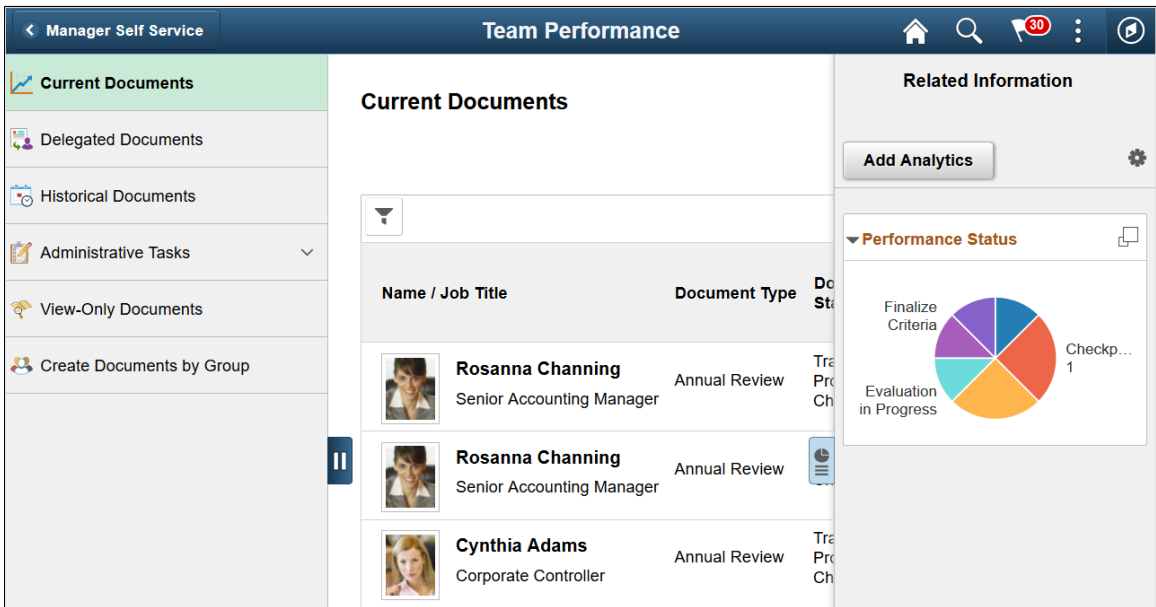
Image: (Smartphone) Supplementary panel for Team Performance

This example illustrates the supplementary panel for Team Performance for the smartphone.
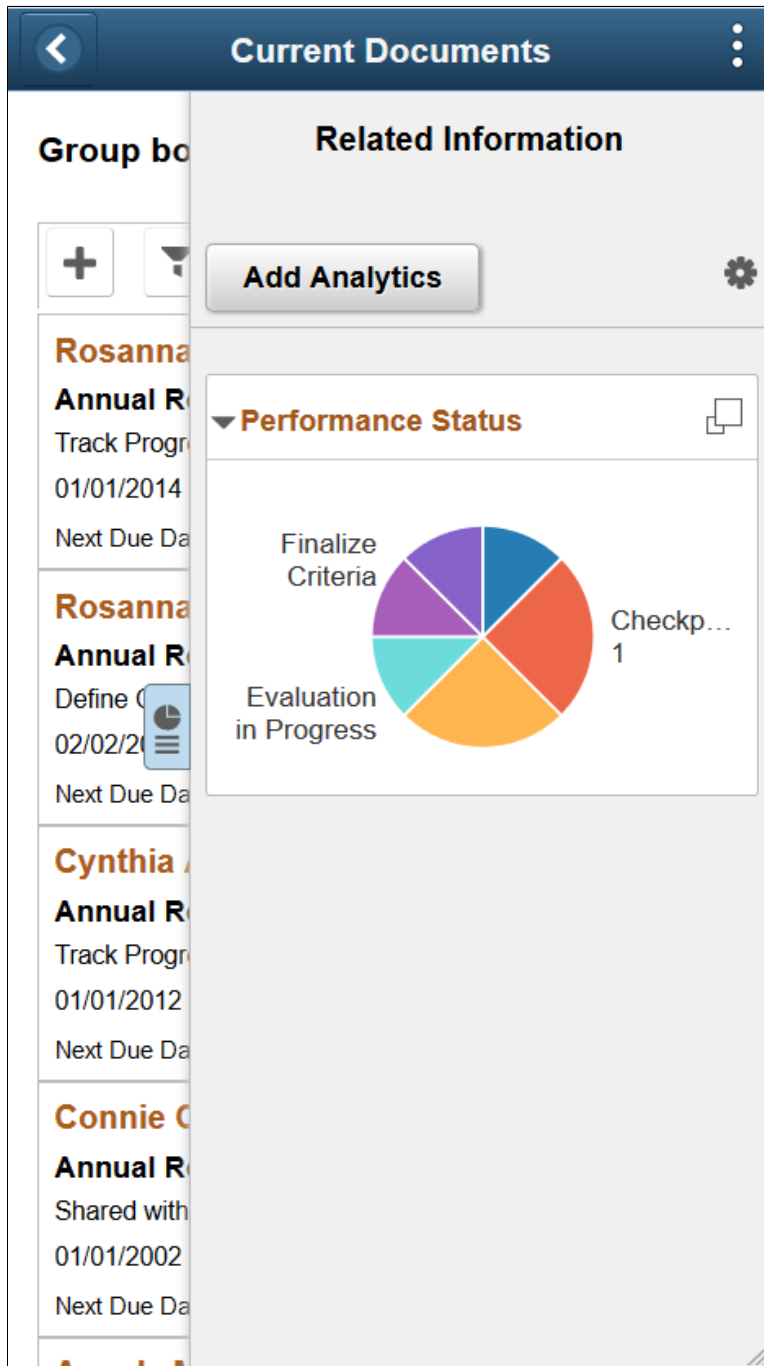
	Click this tab to open the Related Information panel.
(Supplementary Panel tab)	

Related Information	Displays the Performance Status pivot grid chart by default. This chart is the Simplified Analytics version of the Team Performance Status Page.

For information on how to use the Related Information panel (also known as the Unified Related Content Analytics pane), see *PeopleTools: Pivot Grid*, "Working with Simplified Analytics," Accessing Simplified Analytics.

Add Analytics

Click the button to create a new simplified analytics chart using the Create Analytics Wizard.

The delivered role *PivotGridSuperUser* gives users the ability to create and publish reports.

For information on how to create simplified analytics, see *PeopleTools: Pivot Grid*, "Working with Simplified Analytics," Creating Simplified Analytics.

[Personalize RC (Related Content) icon]

This icon appears at the top of the Related Information panel. Click to open the Personalize page. This page lists the available related content so you can choose whether the Related Information panel shows or hides each item.

[Simplified Analytics links]

Click to open the corresponding analytic in modal window.

(Display Performance Status in Modal Window icon)

This icon appears at the top of each individual item in the Related Information panel. Click to expand the item to open a modal dialog with a larger interactive version of the chart.
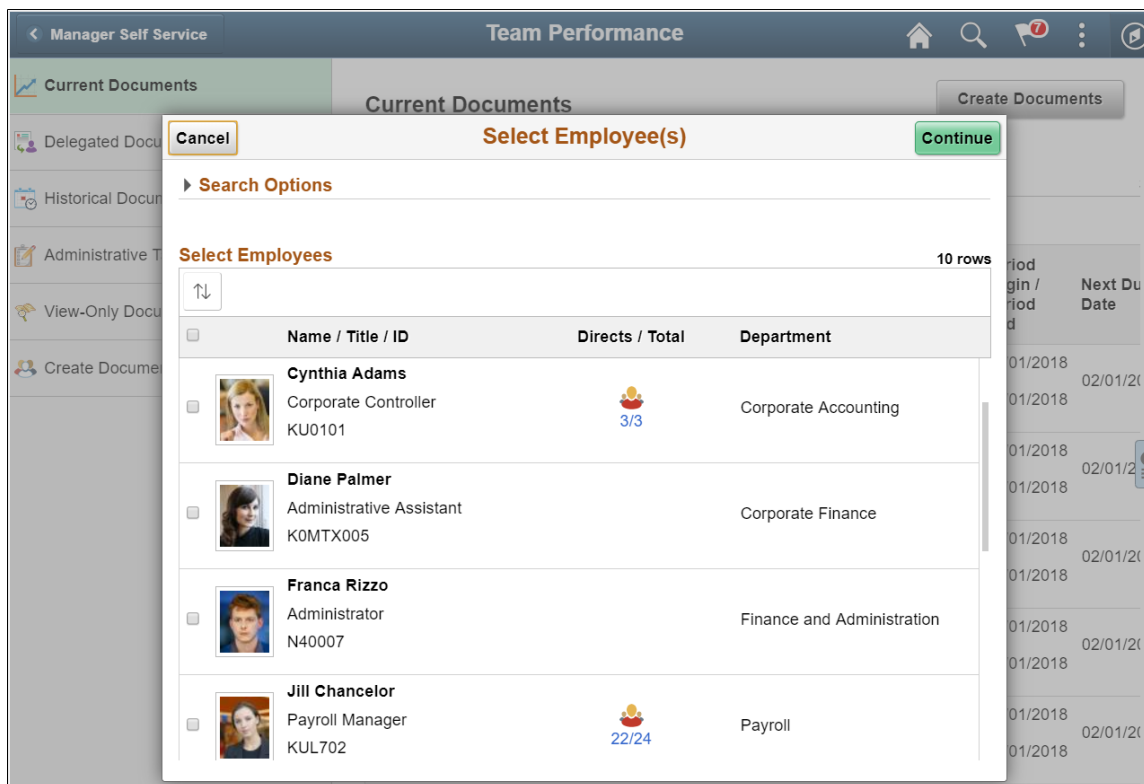
Select Employee(s) Page

Use the Select Employee(s) page (HR_PSEL_FLU) to select employees for whom documents are to be created.

Navigation

Click the Create Documents button or Add icon on the Current Documents page.

Image: Select Employee(s) page

This example illustrates the fields and controls on the Select Employee(s) page.

The ability for managers to create documents for employees is configured in the document type definition. For managers to create documents for any given document type, the option for the manager role to initiate the document creation process must be enabled on the Document Types Page.

The Select Employee(s) page displays all direct and indirect reports of the logged-in manager based on that manager's job. Select from the grid one or more employees (or search for direct or indirect reports in the Search Options section) and click the Continue button.

Note: Indirect report information appears if the Allow Indirect Reports option is enabled on the "Direct Reports Transaction Configuration Page" (PeopleSoft HCM 9.2: Application Fundamentals) for the PeopleSoft Fluid User Interface - Manager Self-Service transaction.

Create Documents Page (Team Performance)

Use the Create Documents page (Team Performance) (EP_CREATE_MSS_FLU) to enter criteria to be used to create documents.

Navigation

Click the Continue button on the Select Employee(s) page.

Image: Create Documents page (Team Performance)

This example illustrates the fields and controls on the Create Documents page (Team Performance).

Managers use this page to specify the criteria used to create new documents. If default values (document type and evaluation period) are specified on the Assign Document Defaults Page for the Manager Self Service page, the system prepopulates them on this page. It also populates the Document Type drop-down field with document types that allow managers to initiate the document creation process.

Create	Click the button to start the document creation process.
	After documents are created successfully, a confirmation message with the created document count is displayed, and a new row for each document is added to the grid in the Current Documents page. Click the row to access the newly created document for the corresponding employee.
	If documents fail to create successfully, the system lists the information in a modal page as reference.

Selected Employees

This grid lists the direct and indirect reports who were selected in the previous step.

Delegated Documents Page (Team Performance)

Use the Delegated Documents page (EP_MSS_DELGATE_FL) to access the documents that are delegated to the logged-in manager.

Navigation

Click the Delegated Documents tab on the left panel of the Team Performance page.

Image: Delegated Documents page (Team Performance)

This example illustrates the fields and controls on the Delegated Documents page (Team Performance).

(Smartphone) To return to the navigation menu, click the back button on the banner.

If the logged-in manager has accepted one or more requests to be the delegated manager on someone's behalf and delegated documents are available, they are accessible on the Delegated Documents page.

The same grid layout is used for displaying current documents and delegated documents. On the top right corner of the grid, row count is displayed.

Documents for or **Delegated Documents For**	Select a manager for whom the documents are shown on the grid. By default, all delegated documents are displayed.
	This field appears if the logged-in manager is delegated by more than one manager. If the logged-in manager is delegated by one manager, that manager's name appears instead.

Click a row to open the corresponding document for review in the ePerformance WorkCenter. From the WorkCenter, you can click the Team Performance button on the page banner to return to the Team Performance page.

Historical Documents Page (Team Performance)

Use the Historical Documents page (Team Performance) (EP_MSS_HIST_FL) to access completed or canceled documents that are owned by the logged-in manager.

Navigation

Click the Historical Documents tab on the left panel of the Team Performance page.

Image: Historical Documents page (Team Performance)

This example illustrates the fields and controls on the Historical Documents page (Team Performance).
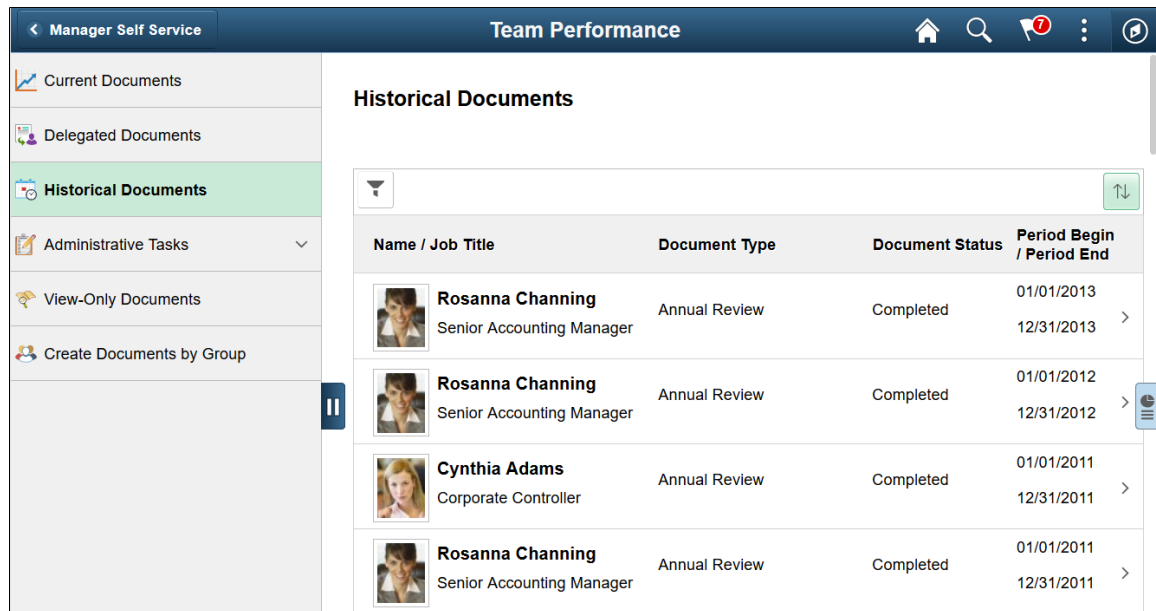
(Smartphone) To return to the navigation menu, click the back button on the banner.

The grid on this page lists all historical documents (document status is either *Completed* or *Canceled*) for the logged-in manager, which include both performance and development documents. Information shown in this grid contains:

- Employee name and job title

- Document type

- Document status

- Evaluation period

Click a row to open the corresponding document for review in the ePerformance WorkCenter. From the WorkCenter, you can click the Team Performance button on the page banner to return to the Team Performance page.

## Transfer Documents Page (Team Performance)

Use the Transfer Documents page (EP_MSSADM_SELCT_FL) to transfer documents to other managers.

Navigation

Click Administrative Tasks and then the Transfer Documents tab on the left panel of the Team Performance page.

Image: Transfer Documents page (Team Performance)

This example illustrates the fields and controls on the Transfer Documents page (Team Performance).

The grid on this page lists all current documents that are owned by the logged-in manager. To transfer documents to another manager, select one or more documents and click the Next button.

Select a Manager Page

Use the Select a Manager page (HR_PSEL_FLU) to select a manager for the document transfer.

Navigation

Click the Next button on the Transfer Documents page.

Image: Select a Manager page

This example illustrates the fields and controls on the Select a Manager page.

To select a manager to whom the documents are transferred, enter the full or partial name, alternate character name, or email address of the manager, and click the Search button. Click to select the desired manager from the search result.

Transfer Documents - Confirmation Page (Team Performance)

Use the Transfer Documents - Confirmation page (EP_MSSADM_CONF_FL) to review and confirm the document transfer.

Navigation

Click a manager row for the transfer on the Select a Manager page.

Image: Transfer Documents - Confirmation page (Team Performance)

This example illustrates the fields and controls on the Transfer Documents - Confirmation page (Team Performance).

The grid on this page lists the selected documents and the receiving manager for the transfer. Click the Select Manager button to choose a different manager if necessary. Click the Save button to complete the document transfer.

Reopen Documents Page (Team Performance)

Use the Reopen Documents page (EP_MSSADM_SELCT_FL) to change the status of documents that are currently in the evaluation phase back to *Evaluation in Progress*.

Navigation

Click Administrative Tasks and then the Reopen Documents tab on the left panel of the Team Performance page.

Image: Reopen Documents page (Team Performance)

This example illustrates the fields and controls on the Reopen Documents page (Team Performance).
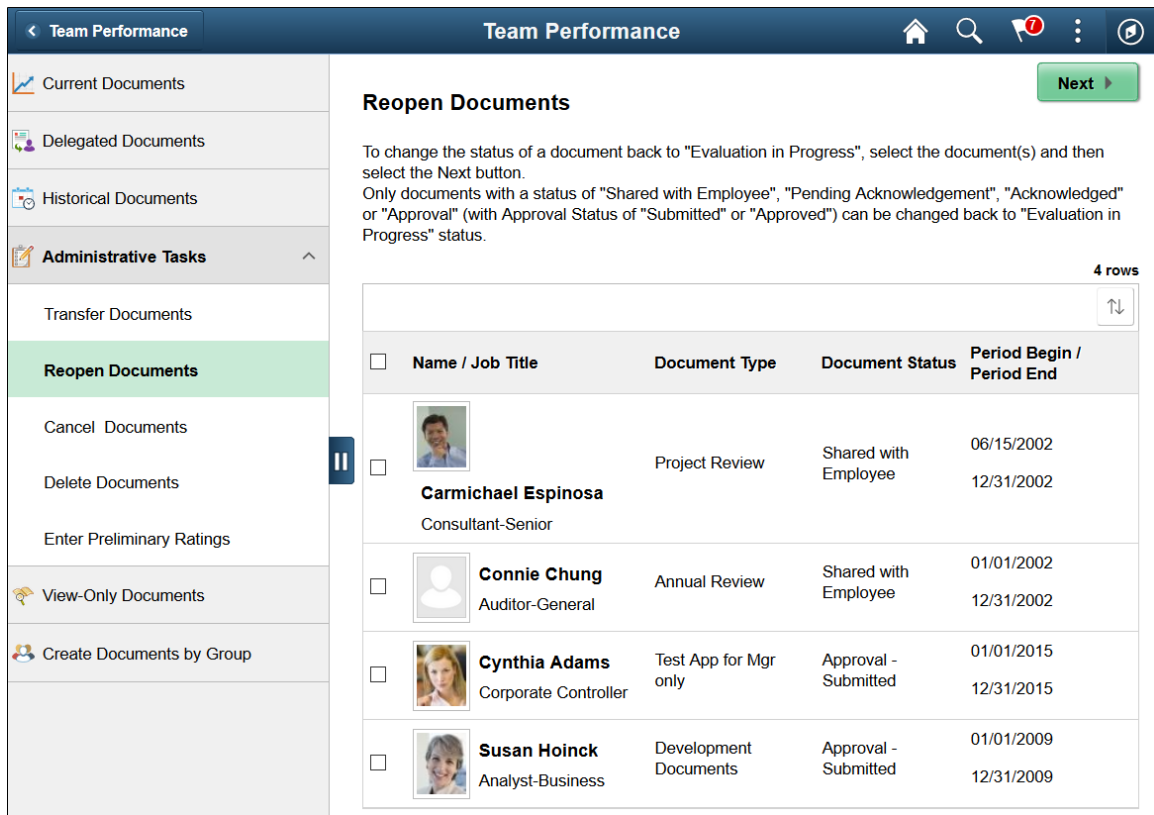
The grid on this page lists the documents (owned by the logged-in manager) that are in any these statuses:

• *Shared with Employee*

• *Pending Acknowledgement*

• *Acknowledged*

• *Approval - Submitted*

• *Approval - Approved*

To change the status of documents back to *Evaluation in Progress* for further updates, select one or more documents and click the Next button.

Reopen Documents - Confirmation Page (Team Performance)

Use the Reopen Documents page (EP_MSSADM_CONF_FL) to review and confirm the status change of the selected documents back to *Evaluation in Progress*.

Navigation

Click the Next button on the Reopen Documents page.

Image: Reopen Documents - Confirmation page (Team Performance)

This example illustrates the fields and controls on the Reopen Documents - Confirmation page (Team Performance).

The grid on this page lists the selected documents to be reopened. Click the Save button to complete the transaction.

Cancel Documents Page (Team Performance)

Use the Cancel Documents page (EP_MSSADM_SELCT_FL) to cancel documents.

Navigation

Click Administrative Tasks and then the Cancel Documents tab on the left panel of the Team Performance page.

Image: Cancel Documents page (Team Performance)

This example illustrates the fields and controls on the Cancel Documents page (Team Performance).
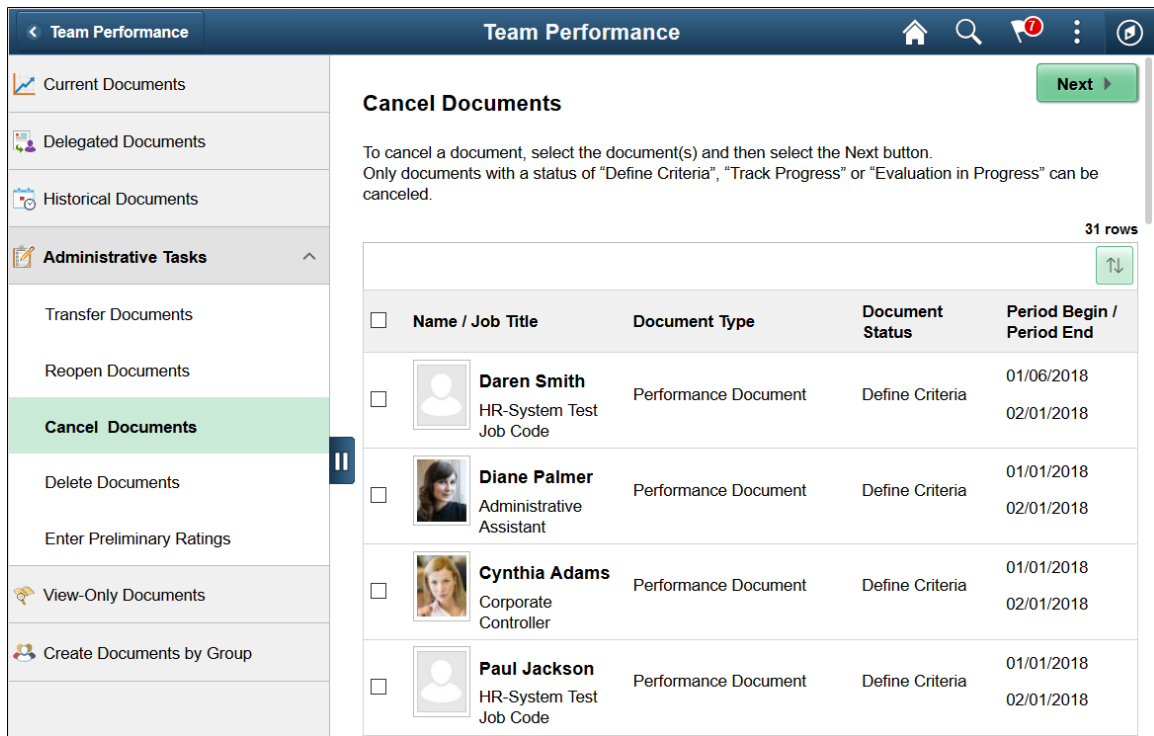
The grid on this page lists the documents (owned by the logged-in manager) that are in any these statuses:

- *Define Criteria*

- *Track Progress*

- *Evaluation in Progress*

Select one or more documents you wish to cancel, and click the Next button.

Cancel Documents - Confirmation Page (Team Performance)

Use the Cancel Documents - Confirmation page (EP_MSSADM_CONF_FL) to review and confirm the cancelation of selected documents.

Navigation

Click the Next button on the Cancel Documents page.

Image: Cancel Documents - Confirmation page (Team Performance)

This example illustrates the fields and controls on the Cancel Documents - Confirmation page (Team Performance).

The grid on this page lists the selected documents to be canceled. Click the Save button to complete the transaction.

Delete Documents Page (Team Performance)

Use the Delete Documents page (EP_MSSADM_SELCT_FL) to delete canceled documents.

Navigation

Click Administrative Tasks and then the Delete Documents tab on the left panel of the Team Performance page.

Image: Delete Documents page (Team Performance)

This example illustrates the fields and controls on the Delete Documents page (Team Performance).
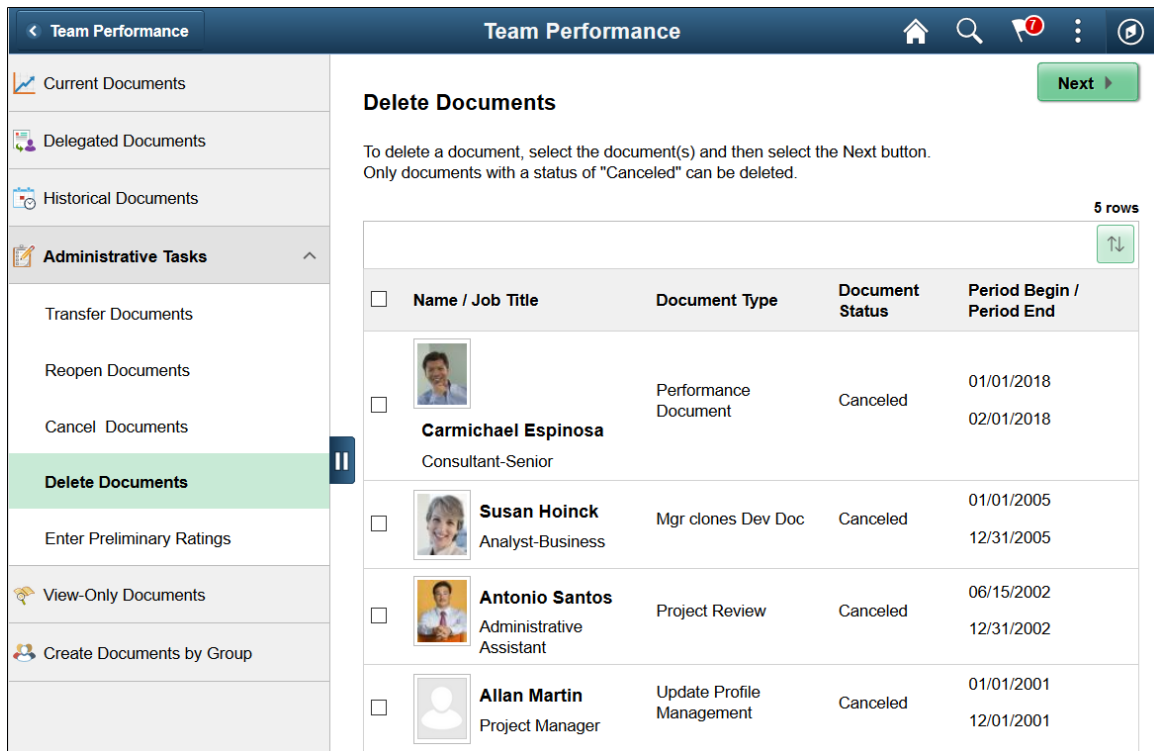
The grid on this page lists the documents (owned by the logged-in manager) that are in the *Canceled* status:

Select one or more documents you wish to delete, and click the Next button.

Delete Documents - Confirmation Page (Team Performance)

Use the Delete Documents - Confirmation page (EP_MSSADM_CONF_FL) to review and confirm the deletion of selected documents.

Navigation

Click the Next button on the Delete Documents page.

Image: Delete Documents - Confirmation page (Team Performance)

This example illustrates the fields and controls on the Delete Documents - Confirmation page (Team Performance).

The grid on this page lists the selected documents to be deleted. Click the Save button to complete the transaction.

Enter Preliminary Ratings Page (Team Performance)

Use the Enter Preliminary Ratings page (EP_MSSADM_CONF_FL) to enter preliminary performance ratings for documents that are currently in progress.

Navigation

Click the Enter Preliminary Rating tab on the left panel of the Team Performance page.

Image: Enter Preliminary Ratings page (Team Performance)

This example illustrates the fields and controls on the Enter Preliminary Ratings page (Team Performance).
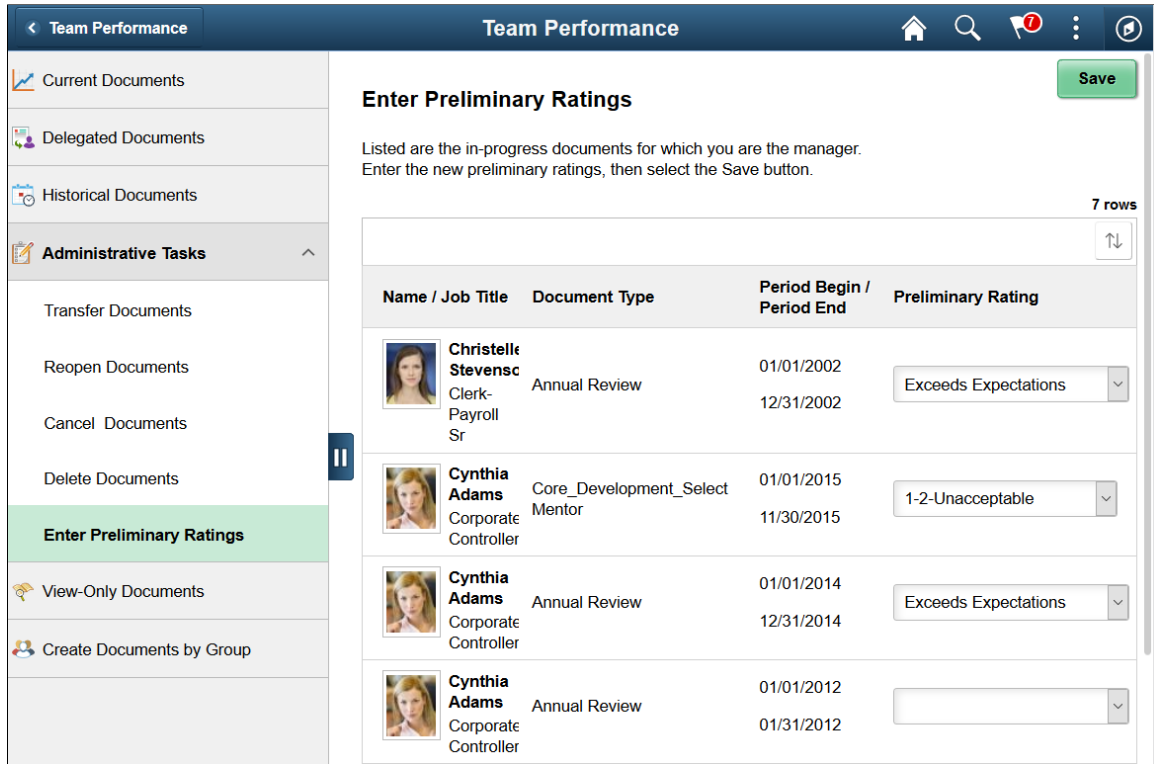
You can enter the preliminary performance ratings for documents (owned by the logged-in manager) that are currently in progress. The rating values of each document come from the rating model that is associated with the Overall Summary section of the document.

View-Only Documents - Select Employee Page (Team Performance)

Use the View-Only Documents - Select Employee page (HR_PSEL_FLU) to select employees and review their documents.

Navigation

Click the View-Only Documents tab on the left panel of the Team Performance page.

Image: View-Only Documents - Select Employee page (Team Performance)

This example illustrates the fields and controls on the View-Only Documents - Select Employee page (Team Performance).

Use this page search for an employee in your reporting organization for whom the documents are displayed. You can either select the individual from the Select Employee section, or search by entering the full or partial name, title or email address of the individual in the Search Options section.

View-Only Documents - Document List Page (Team Performance)

Use the View-Only Documents - Document List page (EP_MSS_VIEWONLY_FL) to view the list of documents for the selected employee.

Navigation

Click an employee row on the View-Only Documents - Select Employee page.

Image: View-Only Documents - Document List page (Team Performance)

This example illustrates the fields and controls on the View-Only Documents - Document List page (Team Performance).
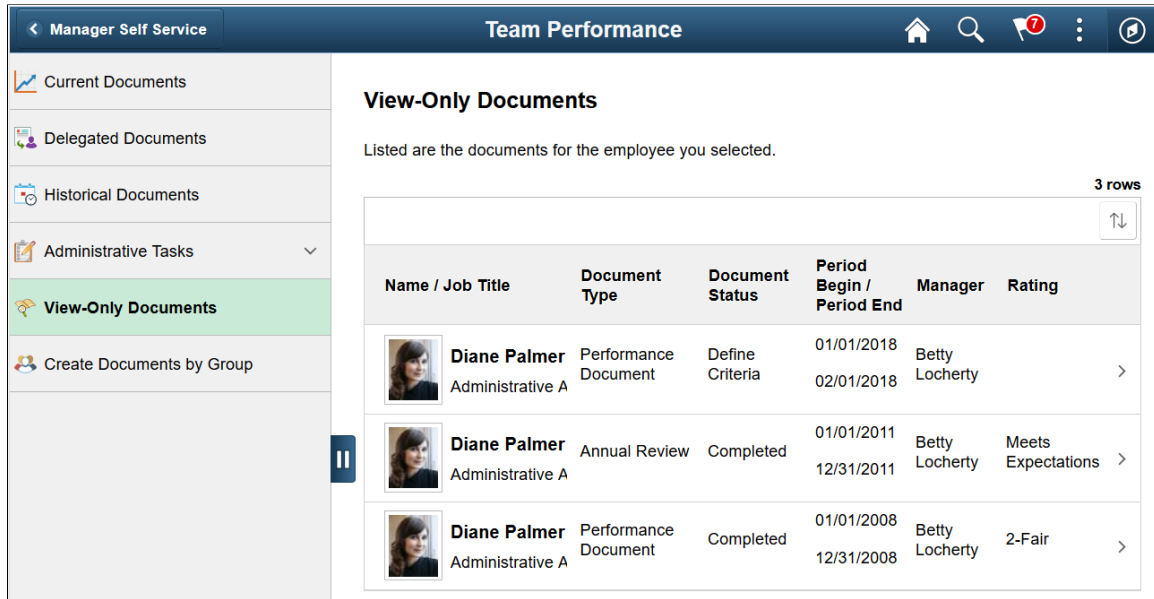
The grid on this page lists all the documents created for the selected employee, with the exception of the deleted ones. Click a document row to view the it in detail.

Create Documents by Group - Select Group Page (Team Performance)

Use the Create Documents by Group - Select Group page (HR_PSEL_GROUP_FL) to select a group of employees for whom documents are created.

Navigation

Click the Create Documents by Group tab on the left panel of the Team Performance page.

Image: Create Documents by Group - Select Group page (Team Performance)

This example illustrates the fields and controls on the Create Documents by Group - Select Group page (Team Performance).

Click a group row for which documents are to be created.

Create Documents by Group - Select Employees Page (Team Performance)

Use the Create Documents by Group - Select Employees page (HR_PSEL_GROUP_FL) to select employees from the selected group for whom documents are created.

Navigation

Click a group row on the Create Documents by Group - Select Group page.

Image: Create Documents by Group - Select Employees page (Team Performance)

This example illustrates the fields and controls on the Create Documents by Group - Select Employees page (Team Performance).
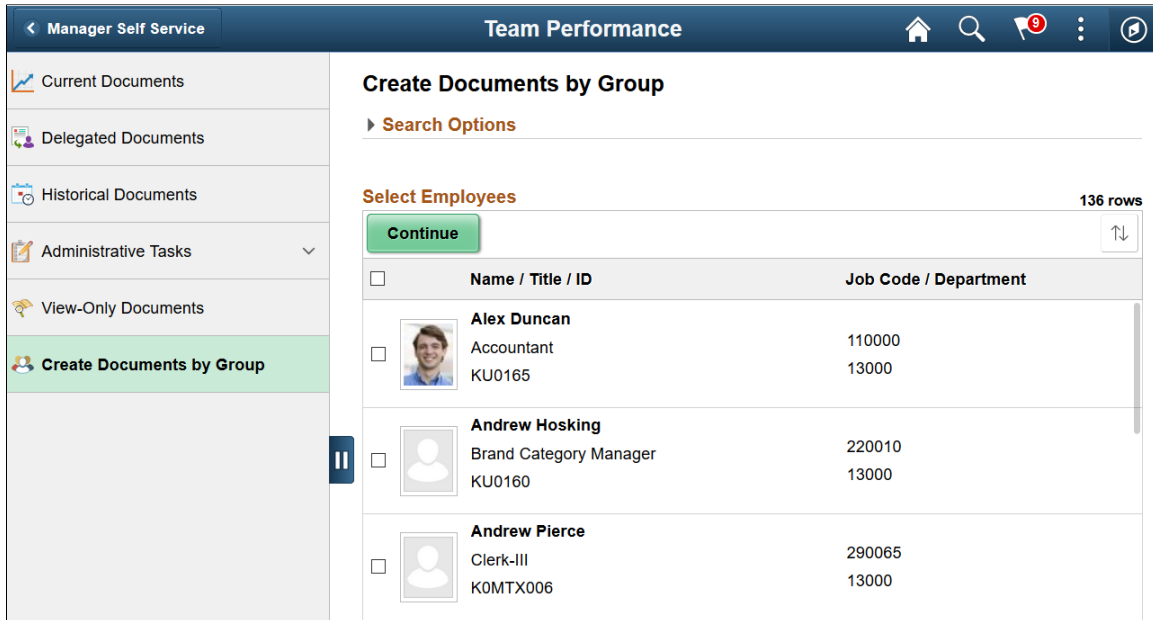
Select one ore more employees from the group for whom documents are created, and click the Continue button to move to the next step.

Create Documents by Group - Document Creation Details Page (Team Performance)

Use the Create Documents by Group - Document Creation Details page (EP_CREATE_MSS_FLU) to select the document template and dates that are used to create documents.

Navigation

Click the Continue button on the Create Documents by Group - Select Employees page.

Image: Create Documents by Group - Document Creation Details page (Team Performance)

This example illustrates the fields and controls on the Create Documents by Group - Document Creation Details page (Team Performance).

Specify the evaluation period and document type of the documents to be created for the selected employees. Depending on the selected document type, select additional information as needed, such as the template, the language used, and whether to create documents by cloning from prior ones. Click the Create button to generate the documents.

Create Documents by Group - Results Page (Team Performance)
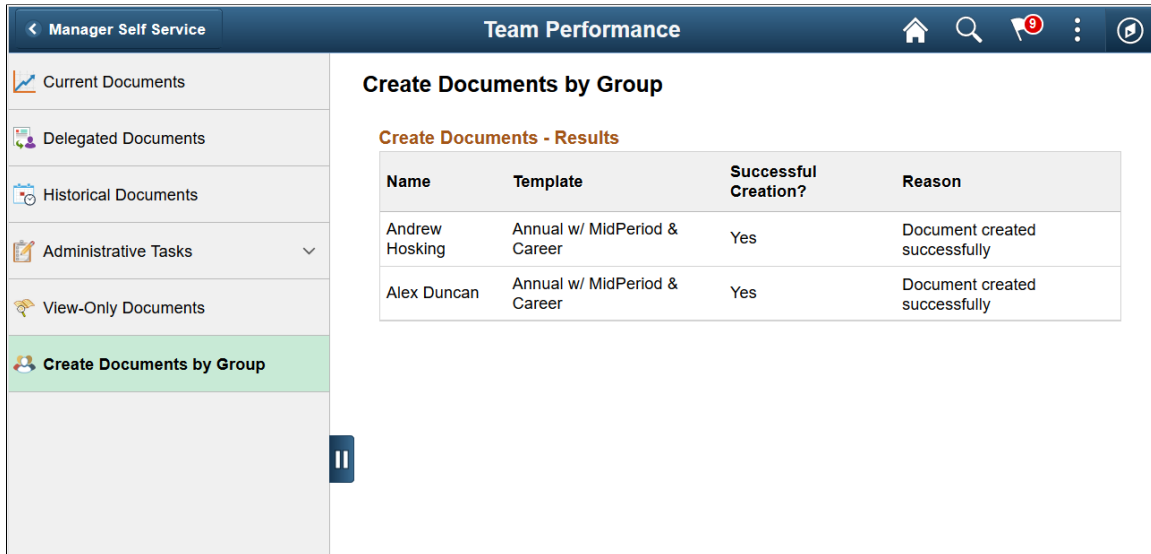
Use the Create Documents by Group - Results page (EP_CREATE_M_RS_FLU) to view the document creation results.

Navigation

Click the Create button on the Create Documents by Group - Document Creation Details page.

Image: Create Documents by Group - Results page (Team Performance)

This example illustrates the fields and controls on the Create Documents by Group - Results page (Team Performance).

Use this page to view the document creation results.

Team Performance Status Tile

Use the Team Performance Status tile (EP_PG_DOCSTS_FLU) to view the performance status of all documents in which the logged-in user (or anyone reporting up to the logged-in user) is listed as the manager.

Navigation

- (For the first time) Select *Personalize Homepage* from the Actions List. On the Personalize Homepage for *Manager Self Service* or any preferred home page, add the Team Performance Status tile.

- Select the home page where the Team Performance Status tile is added (for example, the Manager Self Service landing page).

Image: Team Performance Status tile

This example illustrates the fields and controls on the Team Performance Status tile.
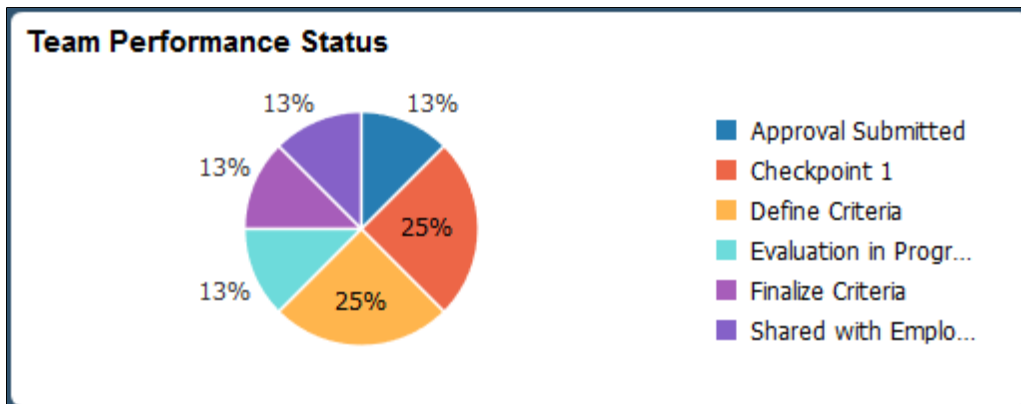
The tile displays the status of all documents in the manager's organization. Click the tile to access the Team Performance Status Page.

By default, it shows the information of the logged-in manager. However, the manager can change settings on the Team Performance Status page and selects a different manager (direct or indirect), in which case the information for that manager's organization is displayed. For example, if Betty Locherty logs in the first time, she sees her organization (including all documents owned by her direct and indirect reports). Later, if Betty Locherty changes the manager to Rosanna Channing, the chart refreshes and shows all documents in Rosanna's organization when Betty views the tile again.

Team Performance Status Page

Use the Team Performance Status page (EP_PG_DOCSTS_FLU) to view the performance status of documents in details, and modify chart displays if necessary.

Navigation

Click the Team Performance Status tile on the Manager Self Service page or a home page where the tile is added.

Image: (Tablet) Team Performance Status page

This example illustrates the fields and controls on the Team Performance Status page for the tablet.
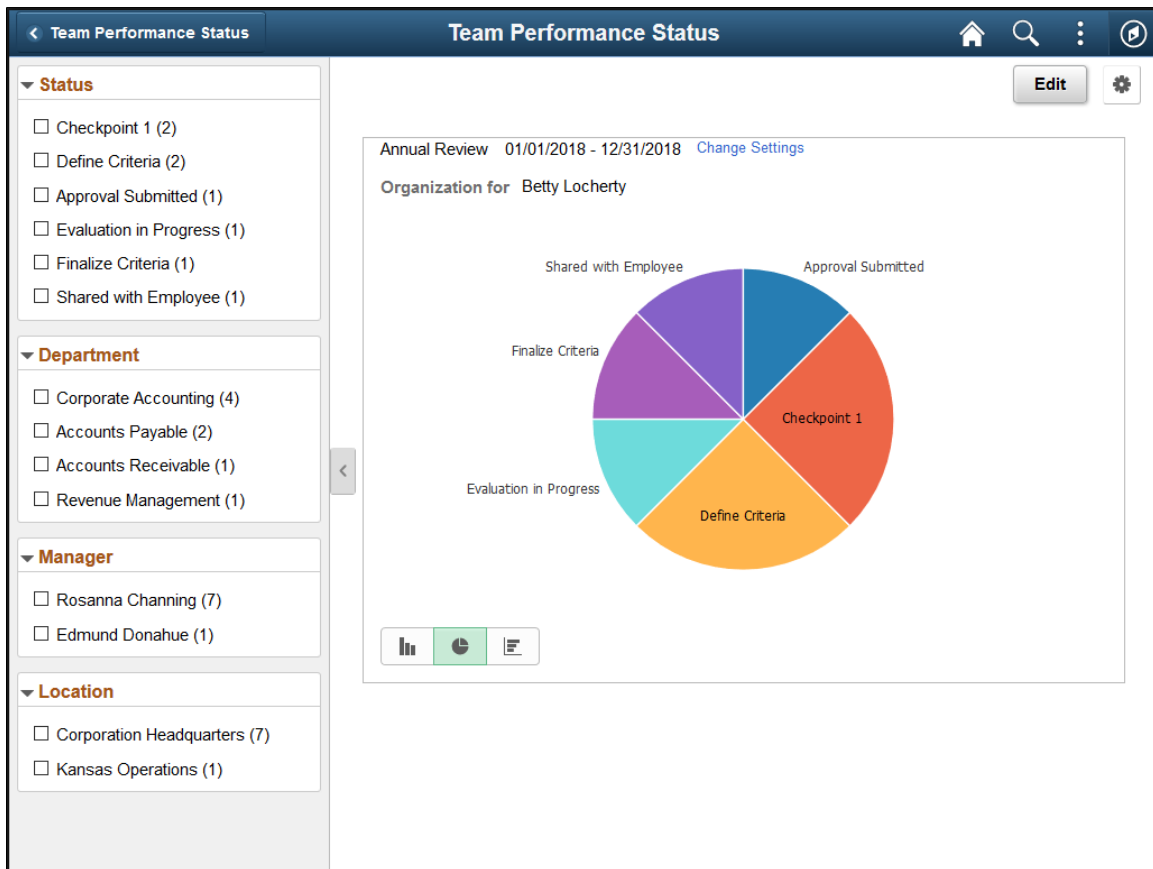
Image: (Smartphone) Team Performance Status page

This example illustrates the fields and controls on the Team Performance Status page for the smartphone.
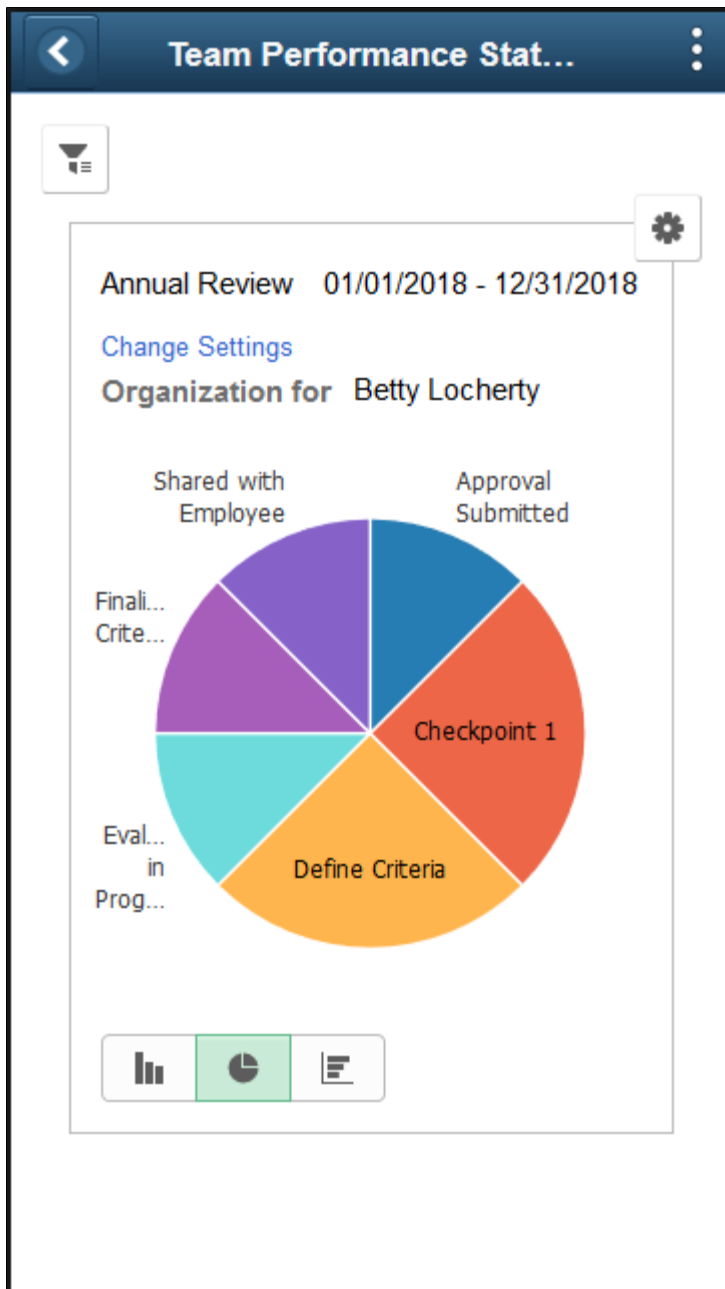
▶ ePerformance Team Performance Status Chart

This page mimics the "My Team's Performance Status Pagelet" (PeopleSoft HCM 9.2: eProfile Manager Desktop) and displays the performance status of all documents in which the logged-in user (or anyone reporting up to the logged-in user) is listed as the manager. In addition to the chart, document information is also presented in a grid view.

Organization for	Displays the name of the manager for which the document status chart is built.

The chart includes all documents that have the logged-in user (or anyone reporting up to him or her) as the manager initially. However, you have the option to select a different manager and view the documents that are specific to his or her organization.

Click the icon to select filter values (by status, by manager, by location, and by department) for the chart. This option is applicable to the smartphone view only.

Click the icon to perform one of these actions:

- View chart data as a whole in pivot grid, and update column and row values as needed.

- Select the available filters to be used in the chart.

  By default, the *Status*, *Manager*, *Location* and *Department* filters are enabled.

- Export data to spreadsheets.

- Edit chart options.

  See the *Viewing a Pivot Grid Model Using the Pivot Grid Viewer* topic in *PeopleTools: Pivot Grid* for more information on using the chart options.

Change Settings   Click the link to select or update parameters (document type, evaluation period, and manager) that are used to build the chart on a modal page.

Filter Criteria

From the filter criteria area, managers can:

- View the document count by filtering parameter.

- Filter document information by status, by manager (which can be direct and indirect reports within the same organization), by location, and by department.

Chart

From the chart, managers can:

- View the distribution of manager's documents by status.

- Click pie segments to view document details of corresponding statuses in a modal window.

- Open documents for edits or viewing from the modal window.
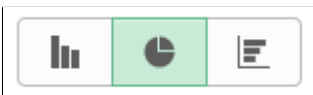
Click to display data in the chart type represented by the icon. Available chart types include vertical bar, pie (default value) and horizontal bar.

Change Settings Page

Use the Change Settings page (EP_PG_CHNG_SET_SCF) to edit the default settings used for launching the Team Performance Status page.

Navigation

Click the Change Settings link on the Team Performance Status page.

Image: Change Settings page

This example illustrates the fields and controls on the Change Settings page.

Cancel	**Change Settings**	Save

*Document Type: Annual Review

*Period Begin: 01/01/2018

*Period End: 12/31/2018

Betty Locherty > Rosanna Channing

Select a Different Manager   8 rows

Name / Job Title	Direct Managers	Department
⦿ Edmund Donahue Manager-Accounting		Accounts Payable
○ John Patterson Manager-Revenue		Revenue Management

Use this page to change the document settings (document type, evaluation period, and manager) that are used populate the chart.

\<name link\> and \<organization hierarchy\>	Click to refresh the Select a Different Manager section to display the organization of the logged-in manager (self). This is useful when you have previously selected a manager for the chart and now you wish to reposition and select a different manager within the organization. As you expand the organization of a direct manager, the page refreshes and shows the current level of the organizational hierarchy you are on in a path.

Select a Different Manager

To choose a manager whose name is not available because he or she is a lower level manager reporting to another manager on the list, click the Direct Managers Count icon to expand the organizational hierarchy of that other manager, and select the person of your choice.

Using the PeopleSoft Fluid User Interface to Work with Documents as Employees

This topic discusses a list of pages that employees can access from a single place in the PeopleSoft Fluid User Interface to work with documents.

For general information about fluid pages in PeopleSoft HCM, see "Understanding PeopleSoft Fluid User Interface Home Pages" (PeopleSoft HCM 9.2: Application Fundamentals).

▶ PeopleSoft Fluid User Interface Experience in HCM

Pages Used to Work with Documents as Employees Using the PeopleSoft Fluid User Interface

Page/Tile Name	Definition Name	Usage
Performance Tile	HC_EP_EE_SELECT_FLU (cref for the tile) EP_EE_TILE_FLU (page for dynamic data)	View the total count of evaluation requests or current documents for the logged-in employee.
Performance Page	EP_EE_SELECT_FLU	Access common ePerformance employee self-service transactions.
My Current Documents Page	EP_EE_SELECT_FLU	Access the employee's own current documents.
Create Document Page (Performance)	EP_CREATE_FLU_SCF	Add new ePerformance documents.
My Historical Documents Page	EP_EE_SELECT_FLU	Access completed or canceled documents that are owned by the employee.
Evaluations of Others Page	EP_EE_SELECT_FLU	Accept or decline evaluation requests, or work on accepted evaluations.
Historical Evaluations of Others Page	EP_EE_SELECT_FLU	Access evaluation documents for others that are completed by the employee.

Performance Tile

Use the Performance tile (EP_EE_TILE_FLU) to view the total count of evaluation requests or current documents for the logged-in employee.

Navigation

Select *Employee Self Service.* The Performance tile is available on the Employee Self Service landing page.

As an employee, you can add the tile, through personalization, to a system-delivered home page or a home page that you create.

Image: (Tablet) Performance tile

This example illustrates the Performance tile for the tablet.
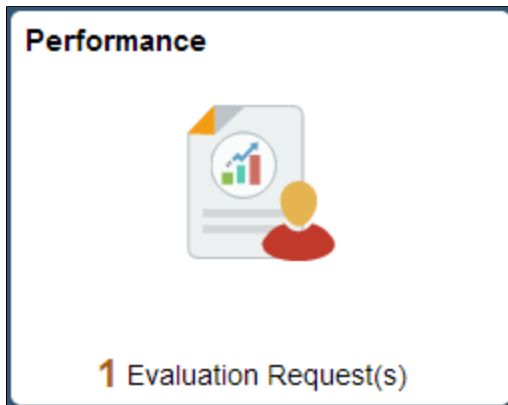
Image: (Smartphone) Performance tile

This example illustrates the Performance tile for the smartphone.
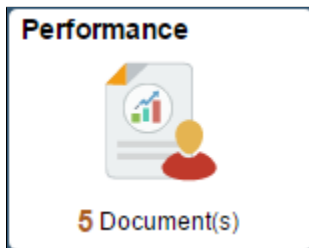
The Performance tile displays:

- The number of evaluation requests.

- (If no evaluation requests are present) The number of current documents.

  If only one document is available, the system displays the next due date of that document.

  If no current documents are present, no document count or text is displayed.

Click the Performance tile to access these employee self-service transactions easily without using traditional menu navigations:

- My Current Documents

- My Historical Documents

- Evaluations of Others

- Historical Evaluations of Others

My Current Documents Page

Use the My Current Documents page (EP_EE_SELECT_FLU) to access the employee's own current documents.

Navigation

Click the Performance tile on the Employee Self Service page or a home page where the tile is added. The My Current Documents page appears as default.

Image: (Tablet) My Current Documents page

This example illustrates the fields and controls on the My Current Documents page for the tablet.
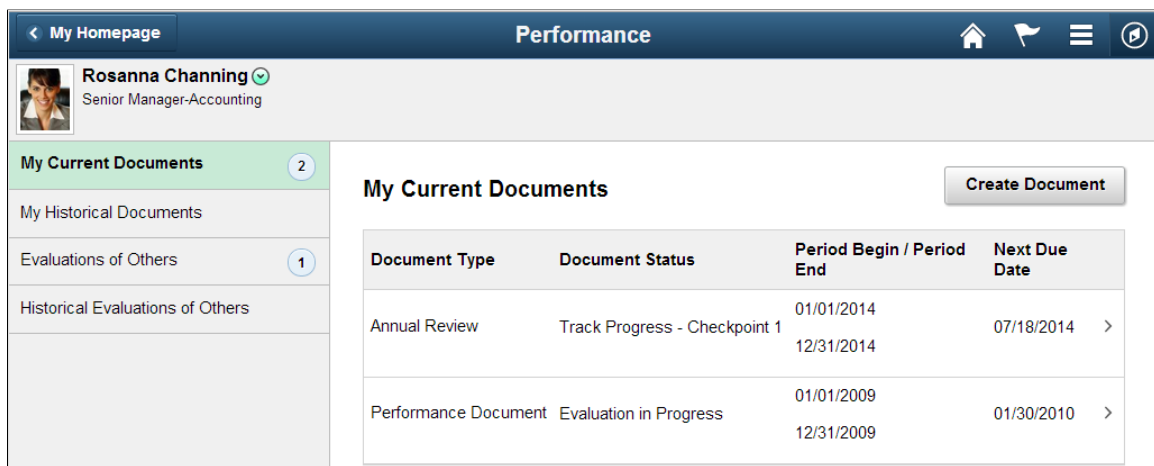
Image: (Smartphone) My Current Documents page

This example illustrates the fields and controls on the My Current Documents page for the smartphone.
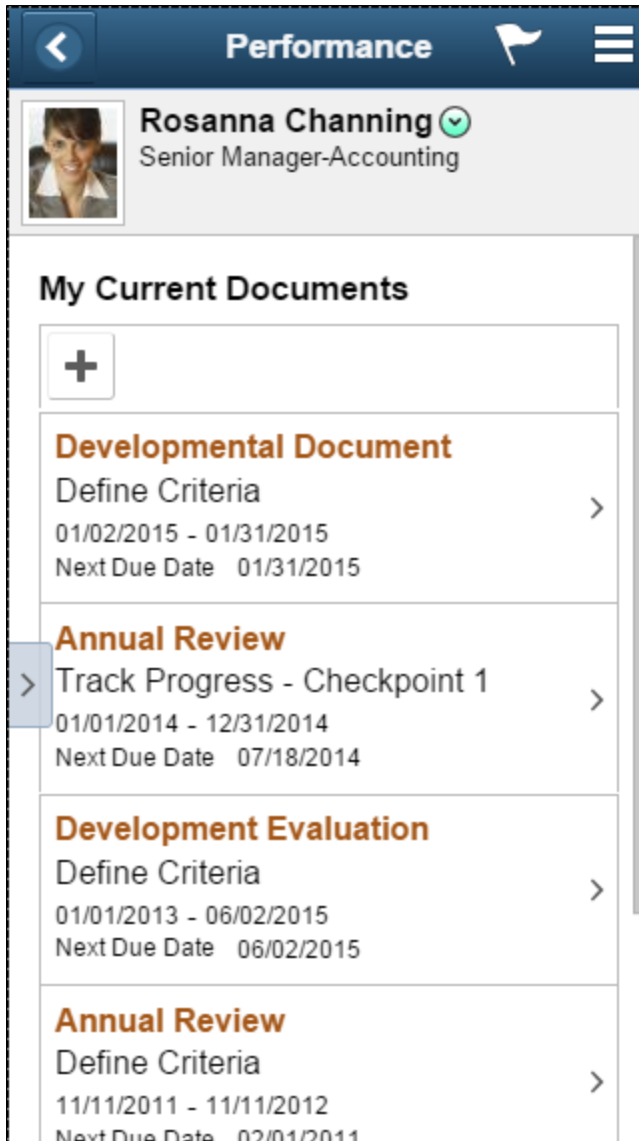
The grid on this page lists all current documents (document status is not *Completed* or *Canceled*) for the logged-on employee, which include both performance and development documents. Information shown in this grid contains:

- Document type

- Document status

- Evaluation period

- Next due date

Click a document row to open the corresponding document for edits in the ePerformance WorkCenter. From the WorkCenter, you can click the Performance button on the page banner to return to the Performance page.

Create Document   Click the button to access the Create Document page to create new documents as an employee.

Create Document Page (Performance)

Use the Create Document (Performance) page (EP_CREATE_FLU_SCF) to add new ePerformance documents.

Navigation

Click the Create Document button on the My Current Documents page.

Image: Create Document page (Performance)

This example illustrates the fields and controls on the Create Document page (Performance).

Employees use this page to specify the criteria used to create new documents.

If default values (document type and evaluation period) are specified on the Assign Document Defaults Page for the Employee Self Service page, the system prepopulates them on the Create Document page.

The ability for employees to create documents is configured in the document type definition. The system populates the Document Type drop-down field with document types that allow employees to initiate the document creation process.

Note: To prevent employees from creating documents in the PeopleSoft Fluid User Interface, make sure to disable employee's ability to initiate document creation process on the Document Types Page. Since the Create Document page is a secondary page in the PeopleSoft Fluid User Interface, it cannot be hidden to employees through permission lists.

If the document that you create already exists, the system displays a message about it and no document is created.

After the document is created successfully, a confirmation message with the created document is displayed, and a new row for it is added to the grid on the My Current Documents page. The count for my current documents is updated on the left panel as well.

See Create <Performance or Development> Documents Page

My Historical Documents Page

Use the My Historical Documents page (EP_EE_SELECT_FLU) to access completed or canceled documents that are owned by the employee.

Navigation

Click the My Historical Documents tab on the left panel of the Performance page.

Image: My Historical Documents page

This example illustrates the fields and controls on the My Historical Documents page.

The grid on this page lists all historical documents (document status is either *Completed* or *Canceled*) for the logged-on employee, which include both performance and development documents. Information shown in this grid contains:

•   Document type

•   Document status

•   Evaluation period

Click a document row to open the corresponding document for review in the ePerformance WorkCenter. From the WorkCenter, you can click the Performance button on the page banner to return to the Performance page.

Evaluations of Others Page

Use the Evaluations of Others page (EP_EE_SELECT_FLU) to accept or decline evaluation requests, or work on accepted evaluations.

Navigation

Click the Evaluations of Others tab on the left panel of the Performance page.

Image: Evaluations of Others page

This example illustrates the fields and controls on the Evaluations of Others page.

Pending Evaluation Requests

The grid in this section lists the evaluation requests from others that are pending employee's acceptance.

Accept	Click the button to accept the selected evaluation requests.
	The system removes accepted requests from the Pending Evaluation Requests section and adds them to the Current Evaluations section.
Decline	Click the button to decline the selected evaluation requests.
	On the modal page that appears, the system displays the number of requests you have selected to decline. Optionally, you can enter a comment for declining the requests.
	The system removes declined requests from the Pending Evaluation Requests section.

Submitters of peer nominations receive notifications when their nominations are accepted or declined, if corresponding notifications are enabled on the ePerformance Page.

Current Evaluations

The grid in this section lists the evaluation requests for other employees that the employee has accepted.

The "No data exists" text appears if there are no accepted evaluations for the employee.

Click a row to open and edit the corresponding evaluation for another employee on the <role> Evaluation page. From the WorkCenter, you can click the Performance button on the page banner to return to the Performance page.

Historical Evaluations of Others Page

Use the Historical Evaluations of Others page (EP_EE_SELECT_FLU) to access evaluation documents for others that are completed by the employee.

Navigation

Click the Historical Evaluations of Others tab on the left panel of the Performance page.

Image: Historical Evaluations of Others page

This example illustrates the fields and controls on the Historical Evaluations of Others page.

The grid on this page lists all historical evaluations that the logged-on employee completed for other employees. It includes both performance and development documents. Information shown in this grid contains:

- Employee name

- Document type

- Document status

- Evaluation period

Click a row to view the corresponding evaluation that you completed for another employee on the <role> Evaluation page. From the WorkCenter, you can click the Performance button on the page banner to return to the Performance page.

Chapter 10

Modifying Evaluation Criteria

Understanding Evaluation Criteria Modification

The page that is generated from the document template for this step contains the evaluation criteria. The Define Criteria step enables a manager, an employee, or both, to add criteria, tailor the existing criteria for the employee prior to generating evaluations, or both. Only one user role can approve this step and move the document to the next status. Manager is typically the approver but it is configurable at the document template level.

Image: Define criteria process showing the steps for modifying evaluation criteria

This diagram shows the process for modifying evaluation criteria during the Establish Criteria step:
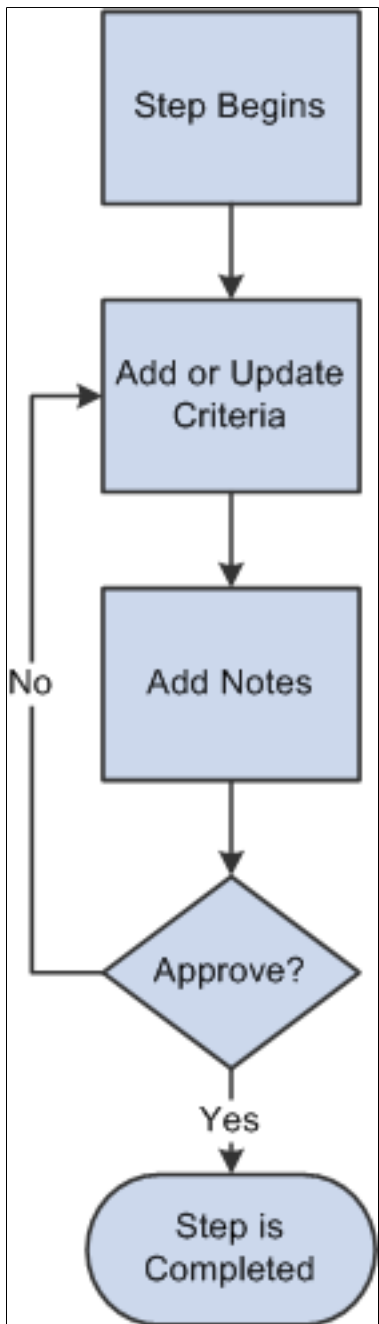
Depending on the role's capabilities as defined on the document template, evaluators can make these modifications to the criteria document:

tests

- Add items:

  - Add predefined (coded) items and sub-items from the content catalog.

  - Add free form items and sub-items.

- • Copy items from the manager's document.

- • Copy items from business objectives.

- Delete criteria.

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

- Update criteria.

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

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

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

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

Documents that are currently in progress at the Define Criteria step are assigned the document status of *Define Criteria*. Document status information is displayed on document search pages, and can be used as a filter for managers and administrators to refine document search results under the Manager Self Service and Workforce Development menus respectively. When a document with the *Define Criteria* document status is opened, *In Progress* is shown as the status in its header.

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

Due Date Setup

ePerformance provides two ways to determine various due dates for use in documents. At the template level, the administrator can select:

- Performance Calendar, where actual due dates are specified in the Performance Calendar component.

  For more information on performance calendar, see Defining Performance Calendars.

- Template Setup, where due dates are set to be a number of days before or after the evaluation period end date

Outlook Tasks

For more information, see Understanding Desktop Integration with ePerformance.

Notifications

The administrator can set the system to send out email notifications when these events occur in the Define Criteria step:

- All criteria are defined and completed, or approved.

- The step is reopened.

- Items are added or updated.

See Defining System Settings.

Learning Section

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

- Learning type equals *Activity, Program,* or *Supplemental.*

- Status equals *Planned, Enrolled, In Progress,* or *Completed.*

- Status date falls within the evaluation begin and end dates.

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

Related Links
Understanding Document Templates
Entering Performance Notes

Understanding Document Audits

PeopleSoft delivers three document audits:

1. Document Level audits – This audit records the date, time, and name of the person who performed an action on the document; for example transfer, cancel, complete, acknowledge and so on. Audits at the document level are always turned on; you do not need to select the PS Audit Enabled check box on the ePerformance page. Audit information is displayed in the Audit History group box near the bottom of the page when you are establishing criteria or entering evaluation information on an ePerformance document.

2. Item Level audits – This audit records the date, time, and name of the person who created or modified an item on an ePerformance document. Audits at the item level are always turned on; you do not need to select the PS Audit Enabled check box on the ePerformance page. Audit information is displayed at the item level near the bottom of the section when you are establishing criteria or entering evaluation information on an ePerformance document.

3. Detailed Item History audits: – This audit is controlled by a database trigger and is delivered turned off. To enable this audit select the PS Audit Enabled check box on the ePerformance page . In addition to selecting this check box, you must also use Application Designer to turn on the audits that you want to use. Select the Audit fields in the Record Field Properties dialog box for the EP_APPR_B_ITEM object.

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

For more information about creating record definitions, see the product documentation for *PeopleTools: Application Designer Developer's Guide*.

Document Level Audit History Fields

Here is a list of audit information (user who performed the action and the associated date and time) that is visible in the Audit History group box of documents throughout the evaluation cycle, starting from when criteria are defined to the completion of the evaluation:

- Acknowledged By

- Acknowledged Date and Time

- Approved By

- Approved Date and Time

- Canceled By

- Canceled Date and Time

- Checkpoint # Completed By

- Checkpoint # Completed Date and Time

- Checkpoint # Re-opened by

- Checkpoint # Re-opened Date and Time

- Checkpoint # Skipped by

- Checkpoint # Skipped Date and Time

- Completed By

- Completed Date and Time

- Created By

- Created Date and Time

- Criteria Finalized By

- Criteria Finalized Date and Time

- Finalize Criteria Reopened By

- Finalize Criteria Date and Time

- Last Modified By

- Last Modified Date and Time

- Manager Signed By

- Manager Signed Date and Time

- Reopened By

- Reopened Date and Time

- Transferred By

- Transferred From

- Transferred To

- Transferred Date and Time

Note: The system only displays the fields and the associated data when the field is populated. The system does not display information in the Audit History group box for fields that don't have a user ID or date and time stamp. For example, if the document isn't canceled, the system won't display the Canceled By field in the Audit History group box.

Related Links
ePerformance Page

Prerequisites

Before an authorized user can modify evaluation criteria, complete the following tasks:

1. Activate the Define Criteria business process.

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

2. Define the rules for the define criteria process.

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

3. Activate the ability to add, update, delete, copy objectives and copy manager items to the Define Criteria page for each specific role.

   Select the appropriate check boxes in the Define Criteria Step – Role Rulessection on the Template Definition - Structure page.

Modifying Evaluation Criteria

This topic discusses how to update document evaluation criteria.

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

Pages Used to Modify Evaluation Criteria

Page Name	Definition Name	Usage
Current <Performance or Development> Documents Page or <Performance or Development> Documents Page	EP_APPR_SELECT	Select the document for which you want to modify evaluation criteria.
Define Criteria Page	EP_APPR_BASE1	Add or modify performance or development criteria.
Add <section item> Page	EP_APPR_EDIT3	Add a section item (either free-form or predefined) to the evaluation criteria specified on the document template. **Note:** There are other ways to add items: copy items from business objectives, copy items from manager documents, copy items from other documents of yours (as employees), and copy items from documents of which you are the manager.
Add a Pre-Defined <section item> Page	EP_APPR_EDIT4	Search for a predefined item to add to the evaluation criteria specified on the document template.

Page Name	Definition Name	Usage
Add Your Own <section item> or Edit <section item> Page	EP_APPR_EDIT5	Add a free-form item to or modify an existing item in the evaluation criteria specified on the document template or modify an existing one.
Copy from Business Objectives Page	EP_APPR_EDIT9	Copy goals from established business objectives into a performance or development document.
Copy from Manager Document Page	EP_APPR_EDIT9	Copy goals, responsibilities, competencies and other items from the manager's document into a performance or development document.
Select a Document Page	EP_APPR_SEL_ADDITM	Select a document from which items can be copied to the current document.
Copy <section item> from My Documents or Copy <section item> from My Team's Documents Page	EP_APPR_EDIT9	Copy one or more items from the previously selected document to the current document.
Add a <section item> Behavior Page (EP_APPR_EDIT6)	EP_APPR_EDIT6	Select to add a free-form or a predefined sub-item to the evaluation document.
Add a <section item> Behavior Page (EP_APPR_EDIT7) (For finding predefined items)	EP_APPR_EDIT7	Search and add items that are predefined in the system.
Add a <section item> Behavior or Edit <section item> Behavior Page (For inserting free-form items)	EP_APPR_EDIT8	Add a free-form behavior to or modify an existing one in the evaluation criteria specified on the document template.
Delete Confirmation Page	EO_DEL_CONFIRM	Confirm that you intend to delete an item or behavior.
Performance Notes Page	HR_NP_NOTE_SRCH	Search for performance notes.
Performance Notes - Add/Update Notes Page	HR_NP_NOTE	Add a new performance note to the section.

Define Criteria Page

Use the Define Criteria page (EP_APPR_BASE1) to add or modify performance or development criteria.

Navigation

Click a document that is in the *Define Criteria* status on the (classic) Current Performance Documents, (classic) Current Development Documents, (fluid) Current Documents, or (fluid) My Current Documents page.

Image: Define Criteria page (1 of 2)

This example illustrates the fields and controls on the Define Criteria page (1 of 2).
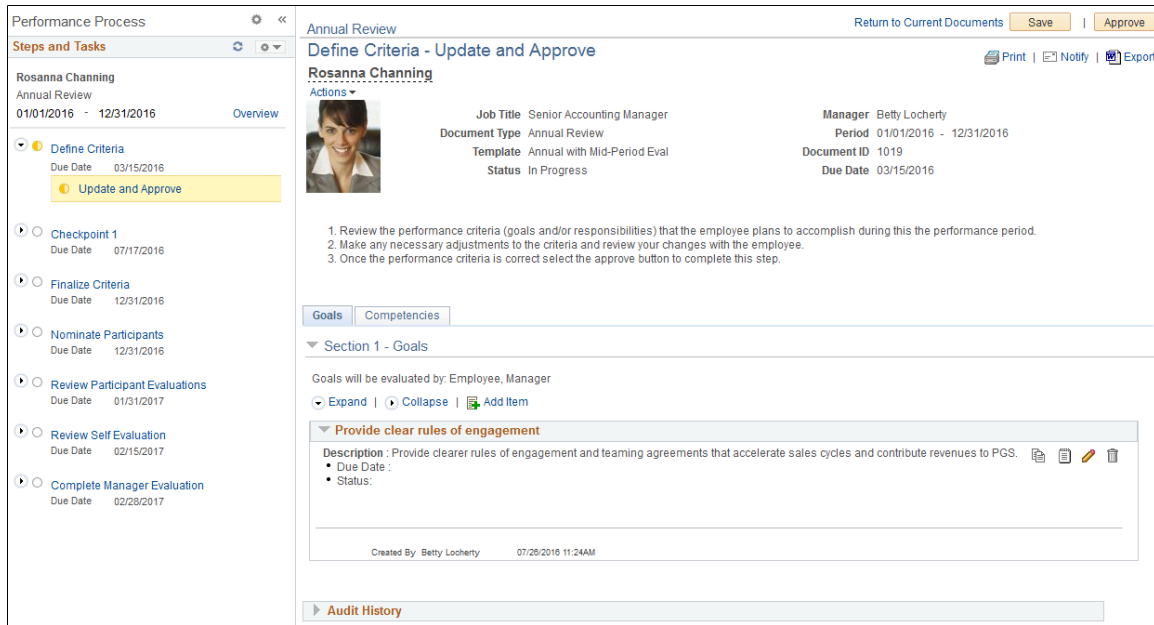
Image: Define Criteria page (2 of 2)

This example illustrates the fields and controls on the Define Criteria page (2 of 2).

Note: The appearance and behavior of Define Criteria page is controlled by its associated template. The page shown in this screenshot is an example of what a document for this business process step may look like. Unless otherwise stated, field descriptions here apply to both performance and development document types.

The document shown in these screenshots is displayed in the tabbed format. The display format of documents is configurable in the document template.

Return to <previously accessed component or page>	Click this link to return to the previous component or page (for example, Org Chart Viewer, View Performance Documents, Current Documents, or Development Document History) prior to accessing the document that you're currently on.
Save	Click this button to save the document.
Approve	Click this button to approve and complete the Define Criteria step. This button is only enabled if you are signed in with the role that can approve this step.

After the Define Criteria step has been approved, the corresponding information is available for review (read-only) by clicking the View link on the Steps and Tasks pagelet. If necessary, the step can be reopened by clicking the Reopen link on the pagelet. |
| **Reopen** | Click this button to reopen a criteria document that you previously completed.

This button displays after you have clicked the link to reopen the already approved Define Criteria step.

Note: A criteria document cannot be reopened after the next step has been started and saved, or a pending nomination is accepted. |
| **Print** | Click the View Printable Evaluation icon to display a printable version of the Establish Criteria document.

The system generates a BI Publisher report that matches the document. The report can include the learning section, eSignature section, employee data, other participants and audit history. Use the browser's Print command to print a hard copy of the document.

Note that the eSignature section only exists in the BI Publisher report, it doesn't appear on the document.

The report definition used for this function is *EP_EVAL*. |
| **Notify** | Click the Notify icon to open the Send Notification page and compose a message about the document to be sent to interested parties. |
| **Export** | Click the Export icon to view and download the document in rich text format (RTF).

The system generates a BI Publisher report for the document, which can be saved to a local system and edited offline. For example, a manager can save the performance document for each direct report and work on the documents without connection to the HCM system. When all the changes are made |

to the local documents, the manager can copy and paste the updates to corresponding documents in the system.

The report definition used for this function is *EP_DOC*.

TAB Format

Click the TAB Format link to display the document in the tabbed format.

This field appears if the display type of the associated document template is set to toggle between tabs and long formats.

Long Format

Click the to Long Format link display the document as one long page.

This field appears if the display type of the associated document template is set to toggle between tabs and long formats.

<Section #> - <section name>

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

Field descriptions for the Learning and Career Plan Summary sections are provided as examples. Refer to the <u><Manager or Self-> Evaluation Page</u> for additional field descriptions that are not mentioned in this topic.

Expand   Click to expand all items that belong to this section.

Collapse   Click to collapse all items that belong to this section.

Business Objectives   Click this link, if available, to view the business objectives associated with this document.

Add Goal, Add Competency, or **Add Responsibility**

Click this link to access the Add <a section item> page, for example, Add Goal, Add Competency. This page displays one of several formats, depending on how you set up the document template for the section item. You can:

- Add predefined (coded) items from the content catalog.

- Add free form items.

- Copy items from business objectives.

- Copy items from the manager's document.

- Copy items from another document of mine (as employee), or another document from my team (as manager).

This link is available if the Enable Items check box is selected in the section definition for the section (for example, Goal, Competency) and the Add Items check box is selected for the role in the Define Criteria Step - Role Rules grid on the document template.

See Also Add <section item> Page.

Important! The system determines who can perform actions on certain sections based upon the role of the user. You assign roles to a section on the Template Definition - Structure page under the Define Criteria Step - Role Rules grid.

Section # - Learning

Use this section to review, add, or delete learning for the employee. This section is available from both the Current and Historical Documents pages.

Learning Name	Click this link to display the <learning name> Description page in the Enterprise Learning Management (ELM) database.
Find Learning Gaps	Click this link to open the Learning Objectives page (if user is an employee), the Team Member Objectives page (if user is a manager), or the Enroll Learners - Find Requester page (if user is an administrator). In addition, clicking this link transmits the competencies (learning objectives), target ratings, and actual ratings from the performance review to the ELM database when any of these conditions is met:

- The actual rating on document is less than the target rating on the document.

- The target or actual rating is blank.

This information is used to perform a gap analysis for the learner in the Enterprise Learning Management side. Any gaps found are added to the appropriate objectives in Enterprise Learning Management, and to the current learning objectives of the manager or employee. The Learning Objectives page that is displayed includes the newly-added objectives. Employees and managers can search for and add learning corresponding to the objectives by clicking the Find Learning Gaps link. Administrators can search for learning by clicking the same link.

Note: The proficiency (rating) for the catalog item is compared with the proficiency needed to meet the objective. This comparison is not taken into account, however, when the system displays the learning. The system displays all learning with all proficiency ratings for an objective. If the user is an administrator, they are taken to the Enroll Learners - Find Requestor page.

For more information about various Learning Objectives pages, see the product documentation for *PeopleSoft HCM: Enterprise Learning Management*

Refresh	Click for the system to retrieve real-time data for the Learning section and display any newly enrolled or planned learning that includes dates that are within the appropriate date range.

Section # - Career Plan Summary

Use this section to review the career planning information for the employee, and access the employee's most current career plan through Manager Self Service if necessary. This section is available from the current and view-only performance as well as development documents through the Manager Self Service and Workforce Development menus.

Risk of Leaving	Displays the risk of this employee leaving his or her current position, as specified on the Manage Career Plans page.
Impact of Loss	Display the impact to the organization if this employee leaves his or her current position, as specified on the Manage Career Plans page.
Career Potential	Displays the career potential of this employee, as specified on the Manage Career Plans - Ranking/Potential page.
Official Career Path	Displays the list of career moves made by this employee, as specified in the Official Career Path section on the Manage Career Plans - Career Path page.
Manager Agreed Career Path	Display the list of manager-supported career moves made by this employee, as specified in the Manager Agreed Path section on the Manage Career Plans - Career Path page.
Personal Path	Displays the personal career path that was created by this employee on the Career Path page through Employee Self Service. This section appears only if the Personal Path section is not marked as private by the employee on the Career Path page.
Update Employee Career Plan	Click to navigate to the Manage Career Plans component in Manager Self Service to perform necessary activities on this employee's most current career plan. This link appears, if the logged on user is currently the manager of the employee and has access to the employee's career plans. Any changes that are made in the Manage Career Plans component for the employee are reflected in this section upon return.
	See "Managing Career Planning Self-Service" (PeopleSoft HCM 9.2: Human Resources Plan Careers and Successions).

<Item #> - <item name>

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

Copy to Other Documents	Click the Copy to Other Documents icon to access the Copy to Other Documents page and select one or more employee documents to which the corresponding item can be copied.
Performance Notes	Click the Performance Notes icon to display the Performance Notes page. It is available if the Notes check box is selected on the Template Definition - Structure page under the Section tab.
	You can access this note later when you enter comments or rate the item on the evaluation using the Writing Tools feature.
	Note: In Notepad, when you delete an item that is associated with a note, the note is not actually deleted from Notepad. However, since the item doesn't exist on the document, the note is no longer associated with that item.
	See "Configuring and Working with the HR Notepad" (PeopleSoft HCM 9.2: Application Fundamentals).
Edit Details	Click the Edit Details icon to display the Edit <section item> page and make updates to the item. It is available if the update field is selected on the Item tab of the Template Definition - Structure page.
Delete <item name>	Click the Delete <section item> icon to remove the item for the page. It is available if the if the Define Criteria step is enabled and the item is not defined as Mandatory on the document template.
Aligns To Objectives	Displays the title of the objective to which the item is aligned, if applicable.
Objective Details	Click the Objective Details icon to access the Objective Details page that lists the details associated with the objective (description and measurement).
Alignment Chain	Click the Alignment Chain icon to access the Objective Alignment Chain page where you can view how this objective is aligned with the objectives higher up in the organization.
Modification History	Click this link to access the Modification History page (EP_ITEM_MOD_HISTRY), which displays before and after values by field name.
	Note: The system does not display this link unless you select the PS Audit Enabled check box on the ePerformance page. In addition to selecting this check box you must also use Application Designer to turn on the audits that you want to use.

Audit History

See Understanding Document Audits.

Related Links

Creating Document Templates
Template Definition - Content Page
Working with Writing Tools

Add <section item> Page

Use the Add <section item> page (EP_APPR_EDIT3) to add the corresponding section item (free-form) to the evaluation criteria specified on the document template.

Navigation

Select the Add Item, Add a Goal, Add Competency or Add Responsibility link that appears on the document

Image: Add <section item> page

This example illustrates the fields and controls on the Add <section item> page.

Performance Document
Add Goal

You have chosen to add a new goal.

You can either enter a new goal on your own or choose a goal already defined in the system. When you are finished, select the Next button to continue.

- ◉ Add pre-defined goal
- ○ Add your own goal
- ○ Copy goal from Business Objectives
- ○ Copy goal from My Document
- ○ Copy Goal from My Team's Documents

Next

Return

Note: The screenshots and field descriptions shown here are for adding a new goal to a document. The pages for adding competencies, responsibilities as well as behaviors are similar.

Add a Pre-Defined <section item> Page

Use the Add a Pre-Defined <section item> page (EP_APPR_EDIT4) to search and add items that are predefined in the system.

Navigation

Select to add predefined item on the Add <section item> page and click the Next button.

Image: Add a Pre-Defined <section item> page

This example illustrates the fields and controls on the Add a Pre-Defined <section item> page.

Search Criteria

<section item>	Enter the word or words that you want the system to use to search for the section item (for example, competency).
Content Group Type	(For the system-delivered Competency section) Select the content group type that you want the system to use for your search. This field is only available if content group types have been defined for the content type (competency).
Content Group	(For the system-delivered Competency section) Select the content group that you want the system to use for your search. This field is only available if content groups have been defined for the content type (competency).
Search	Click to display the results in the Search Results group box.

See "Understanding the Content Catalog" (PeopleSoft HCM 9.2: Human Resources Manage Profiles).

Search Results

Based on the criteria that you entered or selected in the Search Criteria group box, the system displays the competencies after you click Search. Select the competencies that you want to add to the document and then click Save Selected Competencies.

Add Your Own <section item> or Edit <section item> Page

Use the Add Your Own <section item> page or the Edit <section item> page (EP_APPR_EDIT5) to add a free-form item or to modify an existing item to the evaluation criteria specified on the document template.

Navigation

• Select to add your own item (free-form) on the Add <section item> page and click the Next button.

• Click the Edit Details icon of the item that you want to update on the document.

Image: Add Your Own <section item> page

This example illustrates the fields and controls on the Add Your Own <section item> page.

Use the Add Your Own <section item> page to write you own goals that are not yet available in the system using the rich text editor.

Note: If you copy and paste item content into the rich text-enabled Description field, please be advised that the sequencing of any numbered or bulleted lists that are two or more levels deep in the content may not be copied over properly. It is a known issue reported for the third-party editor that PeopleTools uses. Until a fix becomes available, avoid having two or more levels of numbered or bulleted lists in your copied content. Or, always review the sequencing of lists (and make edits manually if necessary) in the description before adding the content to the document.

Align Goals & Objectives to Business Objective

Business Objectives	Click to view the objectives for your organization that are defined for the corresponding objective plan.
Find Different Objectives	Click to search for objectives of other departments in the organization.
Aligns To Objectives	Select an objective from the referenced objective plan to which the new goal aligns.

Image: Edit <section item> page

This example illustrates the fields and controls on the Edit <section item> page.

See the Edit <section item> Page topic for field descriptions that are applicable to the Edit <section item> page.

Copy from Business Objectives Page

Use the Copy From Business Objectives page (EP_APPR_EDIT9) to copy goals from established business objectives into a performance or development document.

Navigation

On the Add a <section item> page, select the Copy goal from Business Objectives radio button and then click the Next button.

Image: Copy from Business Objectives page

This example illustrates the fields and controls on the Copy from Business Objectives page.

Note: The Copy from Business Objectives option is available for selection if the Copy Objective Items role rule option is enabled for the corresponding document section, business process step and user role combination at the document template level.

Select the objectives that you want to copy and then click Copy. The system returns you to the page from which you started.

Copy from Manager Document Page

Use the Copy From Manager Document page (EP_APPR_EDIT9) to copy goals, responsibilities, competencies and other items from the manager's document into a performance or development document.

Navigation

On the Add <section item> page, select to copy item from manager document (as employee) or copy item from my document (as manager), and click the Next button.

Image: Copy from Manager Document page

This example illustrates the fields and controls on the Copy from Manager Document page.

Note: The Copy <item> from My Document or Copy from Manager Document option is available for selection if the Copy Manager's Items role rule option is enabled for the corresponding document section, business process step and user role combination at the document template level.

Select the items that you want to copy from manager's documents that match all the criteria listed in the Manager Document section, and then click Copy. The system returns you to the page from which you started. The system displays an informational message if no items matching the criteria listed in the Manager Document section can be found and copied to this document.

Select a Document Page

Use the Select a Document page (EP_APPR_SEL_ADDITM) to select a document from which items of an employee's document can be copied to the current document.

Navigation

On the Add <section item> page, select to copy item from my documents (as employee) or my team's documents (as manager) and click the Next button.

Image: Select a Document page

This example illustrates the fields and controls on the Select a Document page.

The system returns a list of documents that have the same document usage (performance or development) *and* contain the same section and section content type as the original document, *regardless of document status*. Canceled documents are included in the list as well.

The system defaults the period begin date in the Filter Criteria section to be the begin date of the current document minus three years, filtering documents that were created for the past three years as search results.

Based on the role of the user accessing this page, the document list is different:

• If you are the manager and copy items from your team's documents, you see the documents in which you are listed as the manager, sorted by period begin date in descending order.

• If you are the employee and copy items from your documents, you see the documents that are or were created for you.

From the list, select a document from which you want to copy items to the current document.

Note: In the case of delegation, if you have been authorized to act on behalf of another manager and selected to process transactions for him or her, you will be able work on the ePerformance documents for him or her, and copy items from other documents that he or she is listed as the manager.

Copy <section item> from My Documents or Copy <section item> from My Team's Documents Page

Use the Copy <section item> from My Documents or Copy <section item> from My Team's Documents page to copy one or more items from the previously selected document to the current document.

Navigation

Select a document from the list that appears on the Select a Document page.

Image: Copy <section item> from My Documents page

This example illustrates the fields and controls on the Copy <section item> from My Documents page.

Image: Copy <section item> from My Team's Documents page

This example illustrates the fields and controls on the Copy <section item> from My Team's Documents page.

Note: The Copy from My Documents (for employee) or Copy <item> from My Team's Documents (for manager) option is available for selection if the Copy from Another Document role rule option is enabled for the corresponding document section, business process step and user role combination at the document template level.

The system returns a list of items that have the same content type and section as the document section on which you are currently working. Select one or more items to copy to the current document section. These can be items that were not yet completed in the last evaluation period; they can also be items that recur in every evaluation period.

Items that have already been copied to the current document do not appear in this list.

Note: Private items cannot be copied to working documents using this functionality.

\<select\> (check box) and **Copy**	Click to select the corresponding item to copy to the document on which you are current working.
	Click the Copy button to add the selected items to the working document.
\<item name\>	Click the item name link to display the item description in a modal window.

Rules for Copying Fields of Selected Items To Target Documents

If the period begin date and period end date of the selected *copy from* document are the same as the *copy to* document (the document you are working on), the system copies and displays all fields of the selected items on the target document. If the time periods do not match, the system copies and displays *all but* these fields on the target document:

- Status

- % Complete

- Start Date

- End Date

- Due Date

- Reminder Date

Add a \<section item\> Behavior Page (EP_APPR_EDIT6)

Use the Add a \<section item\> Behavior page (EP_APPR_EDIT6) to add a free-form or a predefined subitem to the evaluation document.

Navigation

Click the Add Behavior link in a section item on the evaluation document.

Image: Add a <section item> Behavior page

This example illustrates the fields and controls on the Add a <section item> Behavior page.

Use this page to add free-form or pre-defined subitems (behaviors) to the corresponding section items.

Add a <section item> Behavior Page (EP_APPR_EDIT7)

Use the Add a <section item> Behavior page (EP_APPR_EDIT7) to search and add subitems that are predefined in the system.

Navigation

Select to add a predefined subitem on the Add <section item> Behavior page and click the Next button.

Image: Add a <section item> Behavior page (EP_APPR_EDIT7)

This example illustrates the fields and controls on the Add a <section item> Behavior page (EP_APPR_EDIT7).

The behavior of this page is the same as the Add a Pre-Defined <section item> page.

Add a <section item> Behavior or Edit <section item> Behavior Page

Use the Add a <section item> Behavior page or Edit <section item> Behavior page (EP_APPR_EDIT8) to add a free-form subitem or modify an existing free-form or a predefined subitem in the evaluation document.

Navigation

- Select to add your own subitem (free-form) on the Add <section item> Behavior page and click the Next button.

- Click the Edit Details icon of the subitem that you want to update on the document.

Image: Add a <section item> Behavior page (EP_APPR_EDIT8)

This example illustrates the fields and controls on the Add a <section item> Behavior page (EP_APPR_EDIT8).

Image: Edit <section item> Behavior page

This example illustrates the fields and controls on the Edit <section item> Behavior page.

Use these pages to add free-form subitems to the evaluation document, or modify existing ones. Click the Update button to save the changes.

Chapter 11

Tracking Mid-Period Progress on Evaluations

Understanding Mid-Period Checkpoints

To provide managers and employees the ability to track employees' progress more closely during the performance period and provide feedback and guidance along the way, ePerformance implements the Track Progress functionality that, when enabled at the document template level, allows the administrator to define checkpoints throughout the performance period where the manager and employee can enter comments regarding the evaluation. While a checkpoint is in progress, the manager and employee can share comments with each other and stop sharing if deemed necessary. Information exchanged in completed checkpoints will be stored in the system for future reference, such as when the employee works on the self evaluation or when the manager prepares the evaluation for the employee. When the last step, *Finalize Criteria*, is completed, comments that are available in the document are copied to the employee and manager evaluations, making it easy for them to reference the checkpoint information while rating the performance and finalize their evaluations.

The behavior of the Track Progress step is configured at the document template level. From there, the administrator specifies:

- Roles of users who can update checkpoints.

- Number of checkpoints to include in this step.

- Roles of users who can complete the Finalize Criteria step.

- If comments entered by the manager and employee need to be added to the manager and employee evaluations respectively.

> ▶ [New ePerformance Features in HCM 9.2](#)

Track Progress Process Overview

In the Track Progress process, two steps are available: *Checkpoint* and *Finalize Criteria*.

This diagram illustrates the steps involved in the Track Progress process flow:

Image: Track Progress Process Flow

Steps involved in the Track Progress process flow
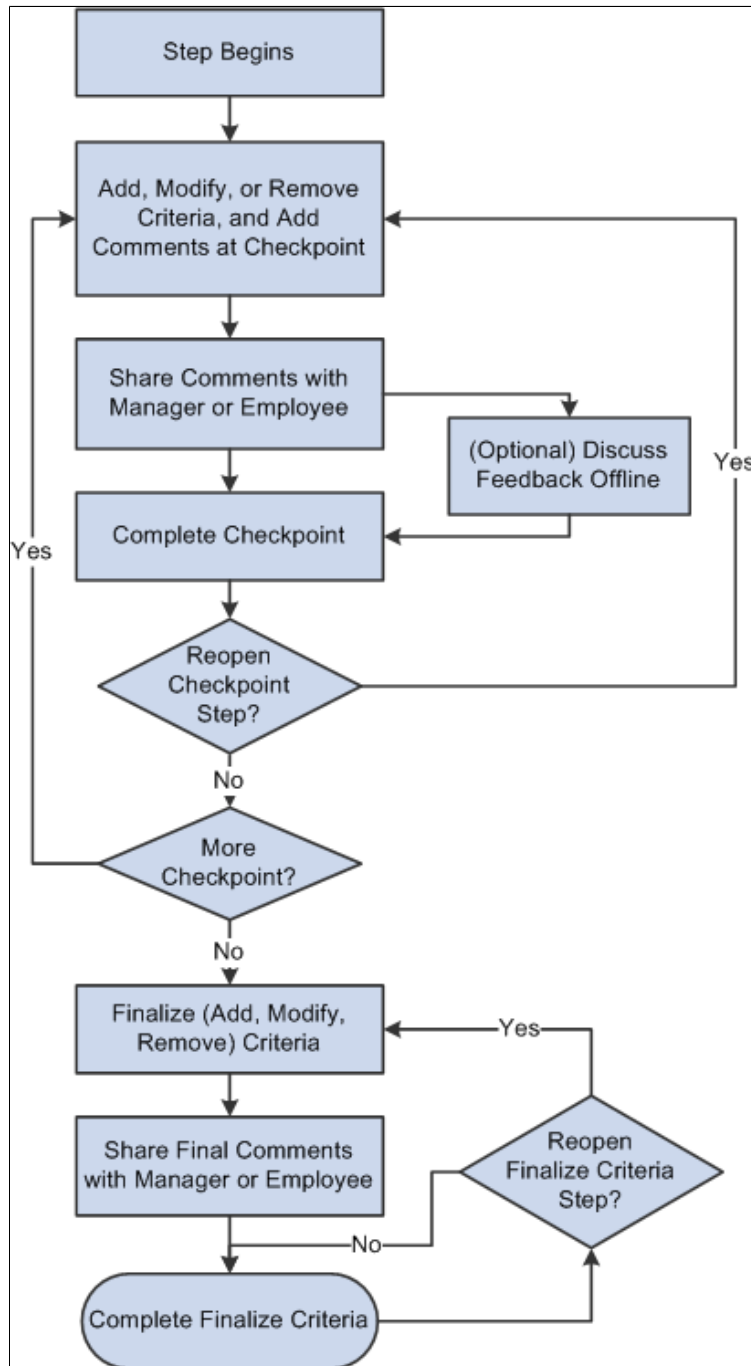
During the Checkpoint step, the employee updates the criteria in the document, adds comments about their performance (for example, progress update on goals) to date and shares the information with the manager. Upon receiving a notification (if configured) from the employee about the shared content, the manager reviews employee's feedback, adds comments, and shares information with the employee. During the review phase, each party can make additional updates and stop sharing content if necessary. The manager may conduct a review (phone, meeting) with the employee to discuss performance based on company policy. When this is done, the manager marks the checkpoint as complete. Based on the number of progress checkpoints that is specified in the document template, the manager and employee reiterate the checkpoint review cycle; the manager can choose to skip checkpoints if deemed unnecessary.

To take advantage of the mid-period review capability, you may insert one checkpoint at the mid-point of the one-year performance period, or insert a checkpoint for each quarter in the performance period. The system supports up to 11 checkpoints during a performance period. Once all the checkpoints have been completed or skipped, the system moves to the Finalize Criteria step.

During the Finalize Criteria step, the manager and employee finalize the criteria to be used in the evaluation process before the actual evaluation begins. This step ensures that the shared document is up to date before the individual evaluations are created. Once the evaluations are created, any item changes (add, update or delete) will not be pushed to the other evaluation documents. This step must be completed before the employee and manager can start their evaluation steps (*Complete Self Evaluation* for the employee and *Complete Manager Evaluation* for the manager), or participants to provide feedback to the employee. Under special circumstances, the Finalize Criteria step can be reopened for the manger and employee to make additional updates.

Documents that are currently in progress at the Track Progress business process are assigned the document status of *Track Progress - Checkpoint* or *Track Progress - Finalize Criteria*. Document status information is displayed on document search pages, and can be used as a filter for managers and administrators to refine document search results under the Manager Self Service and Workforce Development menus respectively. When a document with the *Track Progress* document status is opened, *In Progress* is shown as the status in its header.

Reopening Checkpoint and Finalize Criteria Steps

Completed Checkpoint and Finalize Criteria steps can be reopened for updates if necessary. Each of these steps can be reopened if:

- No nominations have been accepted.

- No evaluation documents for manager, employee, or peer have been started. A document is considered started when the user of that document saves it manually.

- The last modified dates and times of the current step and the previous step (the step you wish to reopen) are identical. The previous step cannot be reopened if information of the current step has been updated.

Folders of previously completed steps are collapsed on documents by default. When you expand the folder of a completed Checkpoint or Finalize Criteria step, the Reopen link appears if the system confirms that the step can be reopened. Click the link to display the corresponding page in the transaction area of the WorkCenter, and click the Reopen button on the page to open it up for edits.

Both managers and administrators can reopen Checkpoint and Finalize Criteria steps. Employees can reopen the Finalize Criteria step, but not checkpoints.

Due Date Setup using Performance Calendar

With the introduction of the Track Progress step, an administrator can add one or more checkpoints at the template level to monitor employee progress and that brings more due dates to the evaluation process. To simplify the setup of due dates for administrators, ePerformance provides the Performance Calendar component in which the administrator specifies an actual date within a calendar period for each step due date that needs to be defined.

At the document template level, the administrator can decide which method to use to determine due dates for documents generated from the template—*Performance Calendar* or *Template Setup* (in which due dates are set to be a number of days before or after the evaluation period end date.

See Defining Performance Calendars.

Outlook Tasks

For more information, see Understanding Desktop Integration with ePerformance.

Notifications

The administrator can set the system to send out email notifications when these events occur in the Track Progress process:

- Comments are shared.

- A checkpoint is completed or skipped.

- The Finalize Criteria step is reopened.

- The Finalize Criteria step is completed.

See Defining System Settings.

Prerequisites

Before the Track Progress step can begin, make sure that:

- The Track Progress step is enabled and configured in the document template.

- On the document that is generated, the Define Criteria step is already completed (if the Define Criteria step is enabled in the document template).

Tracking Mid-Period Progress

This topic discusses how to track mid-period progress in documents.

Pages Used to Track Mid-Period Progress

Page Name	Definition Name	Usage
Checkpoint <#> Page	Page EP_APPR_BASE1	Track the checkpoint progress of a performance or development document.
Finalize Criteria Page	EP_APPR_BASE1	Finalize the evaluation criteria of a performance or development document.

Checkpoint <#> Page

Use the Checkpoint <#> page (EP_APPR_BASE1) to track the checkpoint progress of a performance or development document.

Navigation

Click to open a document that is in the *Track Progress - Checkpoint <#>* status on the (classic) Current Performance Documents, (classic) Current Development Documents, (fluid) Current Documents, or (fluid) My Current Documents page.

Image: Checkpoint <#> page

This example illustrates the fields and controls on the Checkpoint <#> page.

If there are more than one checkpoint, they are named *Checkpoint 1*, *Checkpoint 2*, and so on.

Skip Checkpoint	Click to skip this checkpoint and move to the next available step in the review process.
Share with Employee or **Share with Manager**	Click to share your comments with the employee if you are in the manager role, or share your comments with the manager if you are in the employee role. The label of this button changes based on your user role.
	The system sends an email to the other party about the comments that you would like him or her to review. When this button is clicked and the sharing is confirmed, the system moves the review process to the next step, *Review with Employee* or *Review Manager Comments* (or *Review with Manager* is some cases), depending on the role of the user who are currently viewing the page. The page title shows the updated action if the concatenate page title option is enabled.
Stop Sharing	Click to stop sharing comments with the other party.
	This button appears when the manager currently shares comments with the employee, or the employee currently shares comments with the manager.

Complete Checkpoint	Click to complete this checkpoint.
	Typically, after the manager has met with the employee to go through the review progress, the Checkpoint step can be marked as completed.

Enter section and item comments as permitted by the system to track employee progress. The options to enter comments for sections and items, as well as adding, updating, deleting, and copying items in the Checkpoint step are controlled by the template that is associated with the document.

Edit Comments	Click to open a modal page (EP_EDIT_COMMENTS) to enter plain or rich text comments for the corresponding section or item.
	This link appears if the Enable Rich Text in Modal only option is enabled on the ePerformance Page (EP_INSTALLATION) at the installation level.

Reopening the Checkpoint Step

A completed Checkpoint step can be reopened if necessary. To do so, click the Reopen link that appears under the Checkpoint step on the Steps and Tasks pagelet and confirm the action. Then, click the Reopen button on the document and confirm the action again.

Finalize Criteria Page

Use the Finalize Criteria page (EP_APPR_BASE1) to finalize the evaluation criteria of a performance or development document.

Navigation

Click to open a document that is in the *Track Progress - Finalize Criteria* status on the (classic) Current Performance Documents, (classic) Current Development Documents, (fluid) Current Documents, or (fluid) My Current Documents page.

Image: Finalize Criteria page

This example illustrates the fields and controls on the Finalize Criteria page.
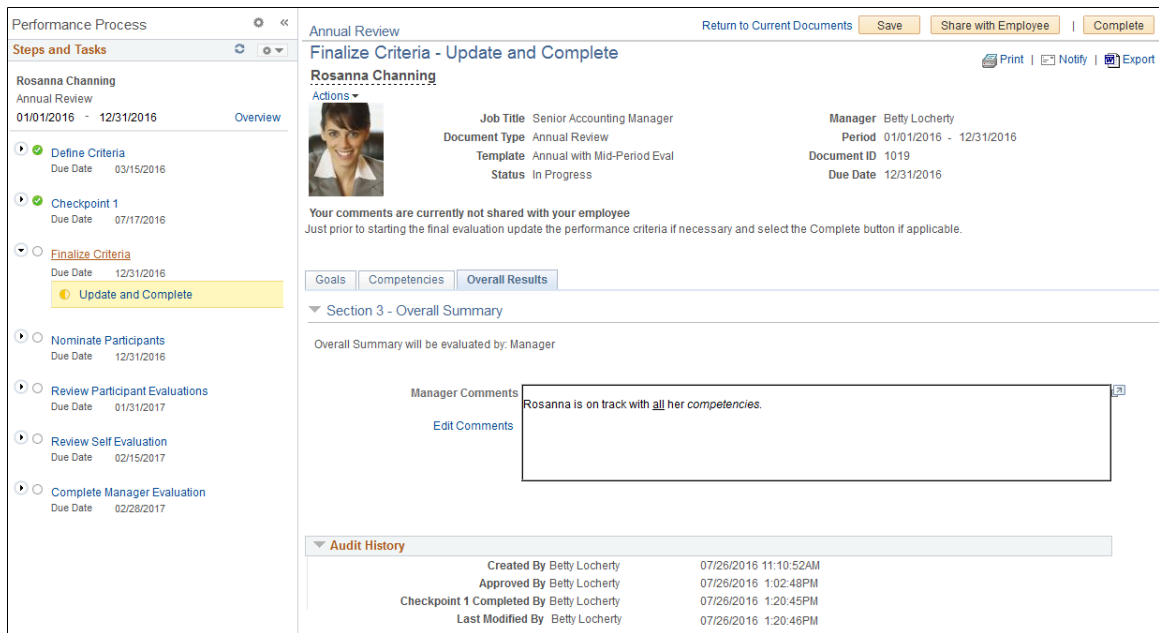
The purpose of this step is to finalize the criteria to be used for the actual evaluation process, and complete the Track Progress business process as a whole. Make changes to the evaluation criteria as needed, the same way you do in the Define Criteria step.

Save	Click to save changes made in the Finalize Criteria step.
Share with Employee or **Share with Manager**	Click to share the criteria document with the employee (if current user is a manager) or the manager (if current user is an employee).
Complete	Click to complete this step after all the criteria are updated and finalized, and move on to the next step in the review process.

Reopening the Finalize Criteria Step

A completed Finalize Criteria step can be reopened if necessary. To do so, click the Reopen link that appears under the Finalize Criteria step on the Steps and Tasks pagelet and confirm the action. Then, click the Reopen button on the document and confirm the action again.

Related Links

Define Criteria Page

Add <section item> Page

Chapter 12

Nominating and Tracking Multi-Source Participants

Understanding the Nomination and Tracking Processes

This section provides an overview of the nomination and tracking process and lists prerequisites.

Nomination and Tracking Process Overview

This topic discusses these subjects:

- Multi-participant process.

- Nominations.

- Multi-participant evaluations.

- Notifications.

Multi-Participant Process

The multi-participant process enables individuals other than the manager and employee to provide direct feedback into an employee's performance or development document. Additional roles might include peers, mentors, customers, and other managers.

You select the roles and specify the capabilities of each role on the document template. The options that you select on the document template also control how the manager and employee interact with the process.

Image: Illustration of the multi-participant process, which enables individuals other than the manager and employee to provide direct feedback into an employee's performance or development document.

This diagram illustrates the steps of the multi-participant process:
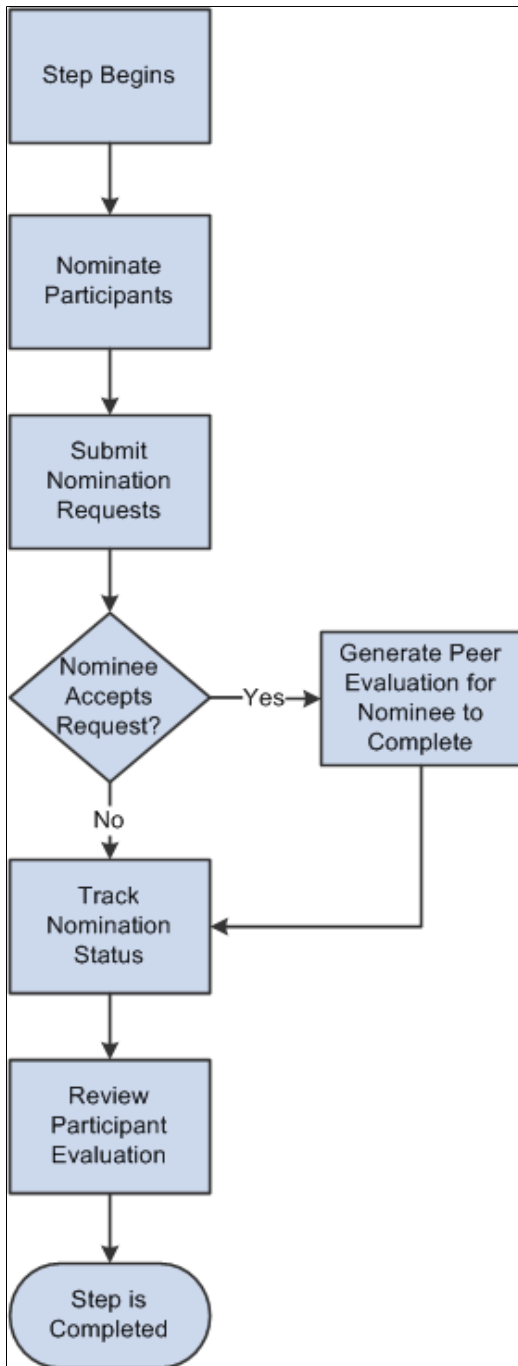
The multi-participant process can begin any time after the Define Criteria step has started.

The actions that managers and employees can perform relative to multiple participants are defined on the Template Definition - Process page in the Nominate Participants and Review Participant Evaluations page regions. These actions include:

• Nominate participants.

Although both the manager and employee can nominate participants if the Updated By check box is selected for their role, only the role that is selected in the Submitted By field can approve and submit the nominations.

Before nominations can be submitted, the Define Criteria step (if the Define Criteria business process is enabled) and the Finalize Criteria step (if the Track Progress business process is enabled) must already be completed.

*   Track the status of nominations and cancel nominations.

    A tracker might cancel a nomination if it is pending for too long. The tracker has the ability to resubmit canceled nominations.

*   Review participant evaluations.

    This step consists of two functions: tracking participant evaluations and accessing the content of participant evaluations. The ability to perform these two functions is set separately on the Template Definition - Process Page of the document template.

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

    Note: A user that can open evaluations can also change the due date of the evaluation or send it back for rework. Both of these actions trigger notifications to the participant.

Optional features of the nomination process that are controlled on the document template include the ability to:

*   Establish a minimum and maximum number of participants.

*   Designate that nominee information is anonymous in the tracking nominations feature.

*   Designate that feedback from a participant role is anonymous for either the manager and/or employee.

Nominations

Nominations are not submitted to nominees until the minimum number of participants are nominated and the Define Criteria step (if the Define Criteria business process is enabled) and Finalize Criteria step (if the Track Progress business process is enabled) are complete. After a nomination is submitted, it has the status of *Pending*.

Nominees can view their evaluation requests and accept or decline nominations. When a nominee accepts a nomination, the nomination status changes to *Accepted,* and the system generates an evaluation for the nominee.

Multi-Participant Evaluations

A nominee who accepts a nomination becomes a *participant.* An evaluation, with the specific content and capabilities that are defined for the role on the document template, is created for each participant at the time they accept the nomination.

Notifications

The administrator can set the system to send out email notifications when nominations are submitted, accepted, declined, or canceled in the Nominate Participants step.

See Defining System Settings.

Related Links

Managing Evaluation Requests
Monitoring and Viewing Participant Evaluations
Understanding Evaluation Data Entry

Prerequisites

Before nominating people other than the manager and employee to participate in a performance or development review, you must:

1. Define any multi-participant roles that will be used in the process.

2. Define a document template that is set up for multiple participants.

3. Generate documents from the template.

4. Begin or complete the Define Criteria step (if enabled) or the Finalize Criteria step (if enabled).

Related Links

Creating Document Templates

Managing Nominations

This topic discusses how to nominate participants in documents.

Pages Used to Nominate Participants

Page Name	Definition Name	Usage
Nominate Participants - Add Nominees Page	EP_APPR_NOM_BUILD	Nominate participants for multi-source evaluations.
Nominate Participants - Track Nominations Page	EP_APPR_NOM_TRACK	Track the status of nominations that you submitted.
"Person Search Page" (PeopleSoft HCM 9.2: Application Fundamentals)	HR_PSS_SEARCH	Search for prospective participants to add to the nomination list.

Nominate Participants - Add Nominees Page

Use the Nominate Participants page (EP_APPR_NOM_BUILD) to nominate participants for multi-source evaluations.

Navigation

Click to open a document on the (classic) Current Performance Documents, (classic) Current Development Documents, (fluid) Current Documents, or (fluid) My Current Documents page. Click the Add Nominees link on the Steps and Tasks pagelet.

Image: Nominate Participants - Add Nominees page

This example illustrates the fields and controls on the Nominate Participants - Add Nominees page.

On this page, you can view the number of participants that are required for each role, view a list of the nominees you selected, and submit evaluation requests to nominees.

Save	Click this button to save the participant list.
Submit Nominations	Click this button to save the participant list and submit the nominations to the nominees. This button only appears if the role you signed in with is enabled to submit nominations on the document template and all the previous steps are complete. Submitted nominations appear on the nominee's Pending Evaluation Requests page.
	See Pending Evaluation Requests Page.

Nominations

This section lists the nominees who are added by the user but not yet submitted.

🗑 **Delete**	Click the Delete icon to delete a participant from the nomination list. This action is available only when the nomination list is not yet submitted.
Add <role>	Click this link to access the Person Search page (HR_PSS_ SEARCH) and search for persons to nominate in the role that is listed. One Add <role> link appears for each participant role that is defined on the document template.

Make sure to save the list when you finish adding participants.

Participant Role Summary

A summary of the nomination status for each participant role appears preceding the participant list for the role. This summary lists the remaining required and maximum nominations that you must submit and have accepted before the Nominate Participants step is complete.

For example, a document template specifies these nomination requirements:

Role	Minimum Required	Maximum Available
Other	0	3
Peer	1	3

If one nomination for the *Other* role and 3 nominations for the *Peer* role are submitted, and one peer nomination is accepted and one is declined the role summary would appear like this:

Role	Minimum Required	Maximum Available
Other	0	2
Peer	0	1

Nominate Participants - Track Nominations Page

Use the Track Nominations - Track Nominations page (EP_APPR_NOM_TRACK) to track the status of nominations that you submitted.

Navigation

Click the Track Nominations link on the Steps and Tasks pagelet of a performance or development document.

Image: Nominate Participants - Track Nominations page

This example illustrates the fields and controls on the Nominate Participants - Track Nominations page.
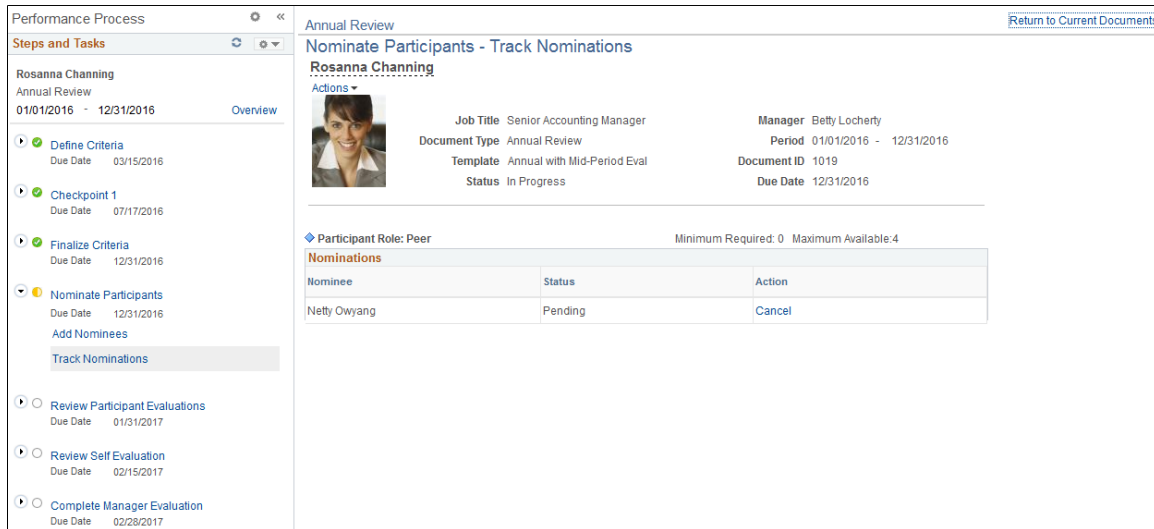
Nominations

Use this scroll area to view the nomination status of each individual nominee, by role. If the Anonymity check box is selected for a role, the nominee is identified by role and a number, otherwise the nominee's name appears in the list. If the nominee accepts the request, the status is shown as *Accepted*.

Cancel	Click this link to cancel a nomination request. The nomination status is then changed to *canceled*.
Resubmit	Click this link to resubmit a nomination request. This link appears for nominations that you previously canceled.
Decline	Click this link to view the nominee's comments on why they declined. This link appears if the nominee declined the evaluation request.

Managing Evaluation Requests

This topic discusses how to manage evaluation requests.

Pages Used to Manage Evaluation Requests

Page Name	*Definition Name*	*Usage*
Pending Evaluation Requests Page	EP_NOM_PENDING_OTH	Respond to requests to provide performance or developmental evaluations for others.
Decline Evaluation Request Nomination Page	EP_DECLINE_CONFIRM	Enter reasons for declining a nomination.

Page Name	Definition Name	Usage
My Current Evaluations for Others Page	EP_APPR_OTH_SELECT	View a list of the evaluations that you are performing for employees who are not in a reporting relationship to you.

Pending Evaluation Requests Page

Use the Pending Evaluation Requests page (EP_NOM_PENDING_OTH) to respond to requests to provide performance or developmental evaluations for others.

Navigation

Self-Service >Performance Management >Other's Performance Documents >Pending Evaluation Requests >Pending Evaluation Requests

Self-Service >Performance Management >Other's Development Documents >Pending Evaluation Requests >Pending Evaluation Requests

Image: Pending Evaluation Requests page

This example illustrates the fields and controls on the Pending Evaluation Requests page.
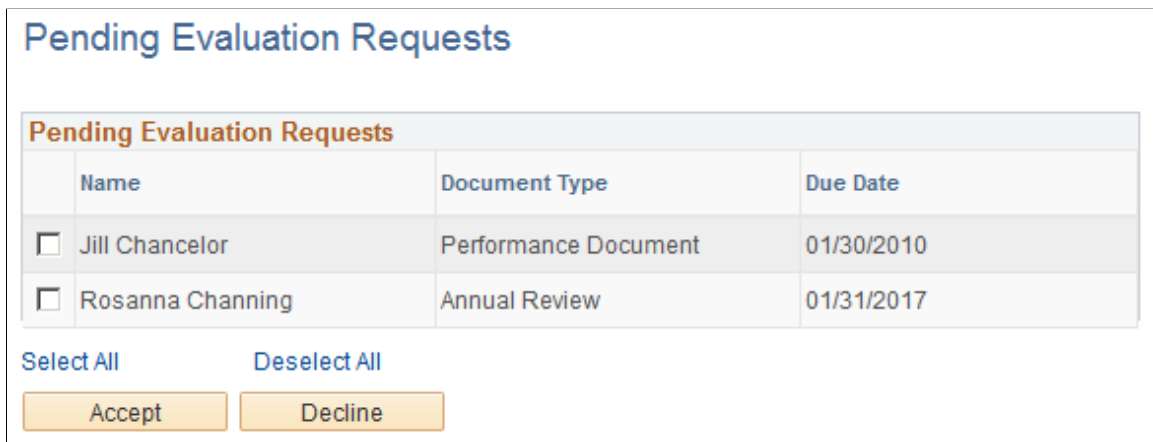
Accept	Click this button to accept the evaluation requests that you select.
	This action changes the nomination status to *Accepted,* creates the evaluation document, adds it to the Other's Performance Documents - Current Documents list, and transfers the user to this navigation. A notification is also sent to the nominator.
Decline	Click this button to decline the evaluation requests that you select.
	This action displays the Decline Evaluation Request Confirmation page. Use this page to enter a reason for declining the nomination. The system changes the nomination status to *Declined* and sends a notification to the nominator.

My Current Evaluations for Others Page

Use the My Current Evaluations for Others page (EP_APPR_OTH_SELECT) to view a list of the evaluations that you are performing for employees who are not in a reporting relationship to you.

Navigation

Select one or more evaluations and click the Accept button on the Pending Evaluation Requests page.

*   Self-Service >Performance Management >Other's Performance Documents >Current Evaluations >My Current Evaluations for Others

*   Self-Service >Performance Management >Other's Development Documents >Current Evaluations >My Current Evaluations for Others

Image: My Current Evaluations for Others page

This example illustrates the fields and controls on the My Current Evaluations for Others page.

If you access this page after accepting one or more evaluations, the message that appears below the page title is *You have successfully accepted the selected evaluations*.

Click an Employee link to access the evaluation for that employee.

Monitoring and Viewing Participant Evaluations

This topic discusses how to monitor participant evaluation status and view the content of participant evaluations.

Page Used to Monitor and View Participant Evaluations

Page Name	Definition Name	Usage
Participant Evaluation Page	EP_APPR_PARTIC_V2	Track the status of multi-participant evaluations and view the content of participant evaluations.

Participant Evaluation Page
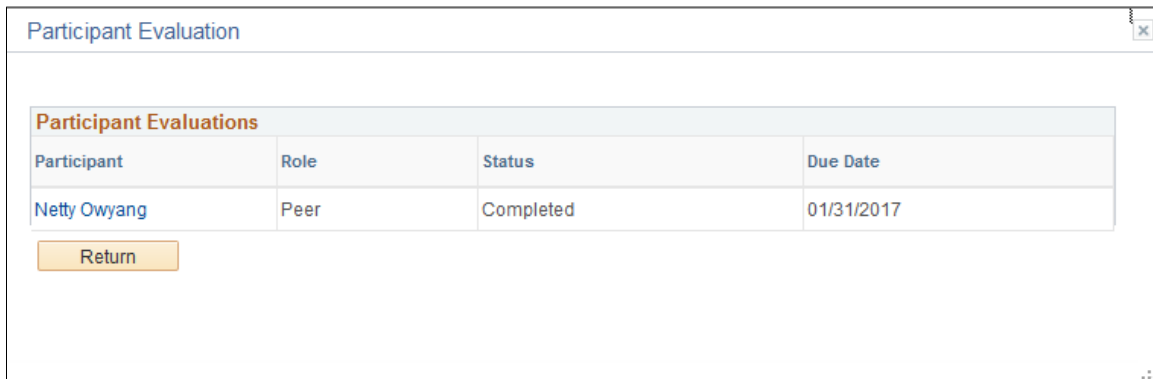
Use the Participant Evaluation page (EP_APPR_PARTIC_V2) to track the status of multi-participant evaluations and view the content of participant evaluations.

Navigation

Click to open a document that is in the *Evaluation in Progress* status on the (classic) Current Performance Documents, (classic) Current Development Documents, (fluid) Current Documents, or (fluid) My Current Documents page. Click the View link in the Review Participant Evaluations step from the Steps and Tasks pagelet.

Image: Participant Evaluation page

This example illustrates the fields and controls on the Participant Evaluation page.

This page is only visible to roles that are enabled to review participant feedback on the document template.

Note: If the Anonymity for Manager check box is selected on the document template, the participants are listed by role: Peer1, Peer2, and so forth. If the Anonymity for Manager check box is deselected, the participant names are visible.

Participant   Click to view the evaluation entered by the participant.

Chapter 13

Entering Comments and Ratings on Evaluations

Understanding Evaluation Data Entry

This topic discusses these topics:

- Performance and development process.

- Preliminary ratings.

- Performance notes.

- Ratings and comments.

- Advisor tools.

- Finalization activities.

- Due date setup.

- Outlook tasks.

- Notifications.

Performance and Development Process

ePerformance is designed to support the complete performance and development process from planning to evaluation. An enterprise can implement the complete process or just portions of it. This topic focuses on the part of the process where participants evaluate the employee's performance or development needs against the evaluation criteria.

Image: This graphic shows the evaluation data entry process for employee self-evaluations, manager evaluations, and multi-participant evaluations

This diagram shows the flow of the evaluation data entry process, which helps assure that you implement all options from planning to evaluation.
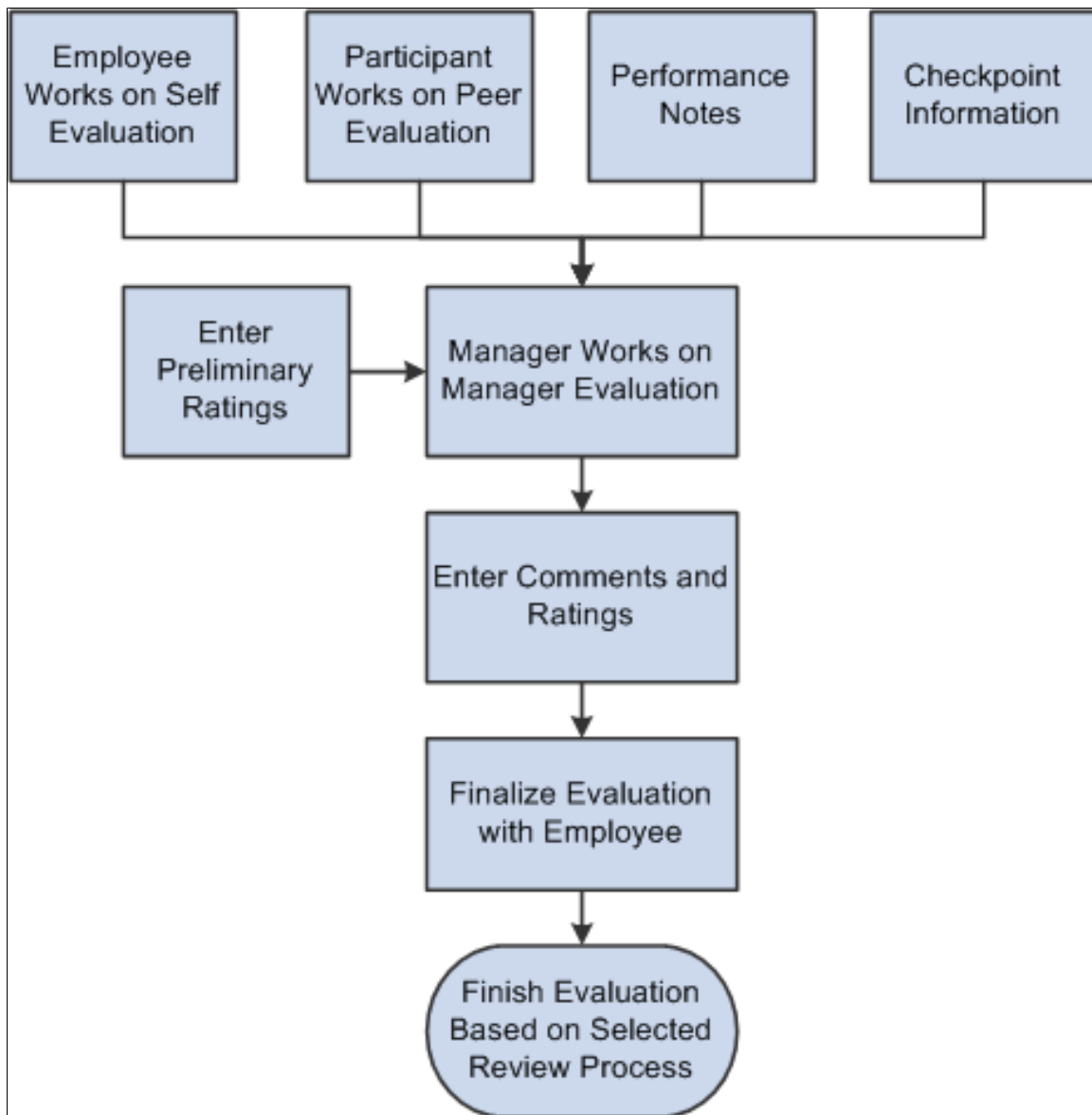
When the evaluation in progress, these tasks are performed by participants concurrently:

• The employee completes the self evaluation.

• (Optional) Participants who agreed to join the evaluation process provide their feedback about the employee.

• The manager reviews employee's self evaluation and feedback from other participants (if available) while composing the manager's evaluation of the employee.

After the employee completes the self evaluation by adding and updating comments and selecting ratings for his or her performance against predefined criteria, the system submits the evaluation to the manager. At this time, both the employee and manager can nominate people in the organization to participate in the

evaluation. Once the manager or employee (as configured in template) submits the request, nominees get an entry on the Pending Evaluation Requests page in the Self Service menu and they need to accept the request in order to participate.

Before adding comments and ratings for the employee, the manager gathers information about the employee's performance by reviewing evaluations from the employee and other participants, as well as information from checkpoints. The manager copies contents from various sources (participants, notes, tips, suggested results and so on) to the manager's evaluation, rates the employee on all sections, provides an overall summary and rating for the evaluation and share it with the employee.

Depending on the review process selected in the document template, additional action links are available to track the approval and review process under the manager evaluation step.

See Understanding Review and Approval Processes.

Preliminary Ratings

The capability to enter preliminary ratings for employees is available to managers only. These ratings are entered before the official rating data is entered in the manager's evaluation, and they are not entered on the evaluation—they are entered on the Enter Preliminary Ratings page. This enables the manager to enter preliminary ratings at any time after the document is created and is in any of these statuses: Define Criteria, Track Progress, and Evaluation in Progress.

Preliminary ratings are used to generate the Ratings Distribution Summary report, which enables managers and HR administrators to compare preliminary ratings with desired and actual rating distributions. Employees cannot see preliminary ratings.

To enable the entry of preliminary ratings, select the Preliminary Rating check box for the Overall Summary section on the document template.

See Recording Preliminary Ratings.

Performance Notes

Managers and employees can record notes about an employee's performance and accomplishments in two ways:

• During the Define Criteria step, the Checkpoint step, and the Finalize Criteria step.

  The Add Note link appears on a section or item during these processes if one or more of them are enabled on the document template. Notes that are added during these steps are directly linked to the section and item to which they apply.

• At any time, by navigating to the Performance Notes page.

  Employees can create records of events, activities, and accomplishments that they can later use to complete their performance evaluations. Similarly, managers can record details of an employee's performance for use when they complete the employee's evaluation. These notes are dated, and are available only to the author of a note. In other words, the manager cannot see notes that the employee enters and vice versa.

ePerformance supports the integration with Microsoft Outlook to insert email content as performance notes to the system. When enabled, managers and employees can add the content of email messages from their Outlook applications directly as performance notes in the system through the PeopleSoft Desktop Integration add-on. For more information, see Understanding Desktop Integration with ePerformance.

Note: There is not a separate page for development notes. The Performance Notes page is used to record any comment. These notes are available for inclusion in either performance or development documents. The Performance Notes page is located under the Performance Management menu item and do not fall under the Performance Documents or Development Documents submenus.

By adding the item ID to the ePerformance Notepad key structure, you can add and store notes at the item level on the Establish Criteria document and then be retrieved them at the item level when you are adding comments to an evaluation using the Writing Tools feature.

See Entering Performance Notes and Understanding Desktop Integration with ePerformance.

Ratings and Comments

The document template setup enables you to configure evaluations for each role (employee, manager, and multi-participant) to include only sections, items, and features that are appropriate for the role to evaluate. For example, on a project review, you might include the Goals, Initiatives, Competencies, and Overall Summary sections on the manager and employee evaluations and enable them to enter ratings and comments on all sections. However, you might include only the Competencies and Overall Summary sections on multi-participant evaluations.

To evaluate an employee's performance, participants can enter and update ratings and comments as permitted by the template at any time during the performance period. Evaluation information is visible in manager evaluations after participants are completed with the reviews, as configured in templates.

Note: A manager can include comments that other evaluators entered on a section or item only if the manager also has comments enabled for the same section and item.

See Updating Evaluations.

Advisor Tools

Depending on the capabilities granted to the participant's role on the document template, any evaluation participant might have access to the Development Tips or Results Writer tools. These tools provide suggestions for incorporating comments. Actual usage of these tools most often occurs when the manager role consolidates feedback and finalizes evaluations.

See Working with Writing Tools.

Finalization Activities

After evaluations are complete, the manager consolidates feedback and ratings into the manager evaluation. The manager conducts a review with the employee (if a review process is required) and submits the evaluation for approval (if an approval process is required).

See Conducting Reviews.

Due Date Setup

ePerformance provides two ways to determine various due dates for use in documents. At the template level, the administrator can select:

• Performance Calendar, where actual due dates are specified in the Performance Calendar component.

   For more information on performance calendar, see Defining Performance Calendars.

- Template Setup, where due dates are set to be a number of days before or after the evaluation period end date

Outlook Tasks

For more information, see <u>Understanding Desktop Integration with ePerformance</u>.

Notifications

The administrator can set the system to send out email notifications when these events occur while evaluations are in progress:

- Evaluations are completed (by managers, employees or other participants).

- Evaluations are sent for rework.

- Evaluation comments are shared.

- Acknowledgement requests are sent or granted.

- Evaluations are canceled.

Related Links

<u>Creating Document Templates</u>
<u>Understanding Evaluation Criteria Modification</u>

Recording Preliminary Ratings

This topic discusses how to enter preliminary ratings.

Page Used to Record Preliminary Ratings

Page Name	Definition Name	Usage
<u>Enter Preliminary Ratings Page</u>	EP_APPR_PRELIM	Select one or more employees for whom to enter preliminary ratings.

Enter Preliminary Ratings Page

Use the Enter Preliminary Ratings page (EP_APPR_PRELIM) to select one or more employees for whom to enter preliminary ratings.

Navigation

Manager Self Service >Performance Management >Performance Documents >Administrative Tasks >Enter Preliminary Ratings >Enter Preliminary Ratings

Image: Enter Preliminary Ratings page

This example illustrates the fields and controls on the Enter Preliminary Ratings page.
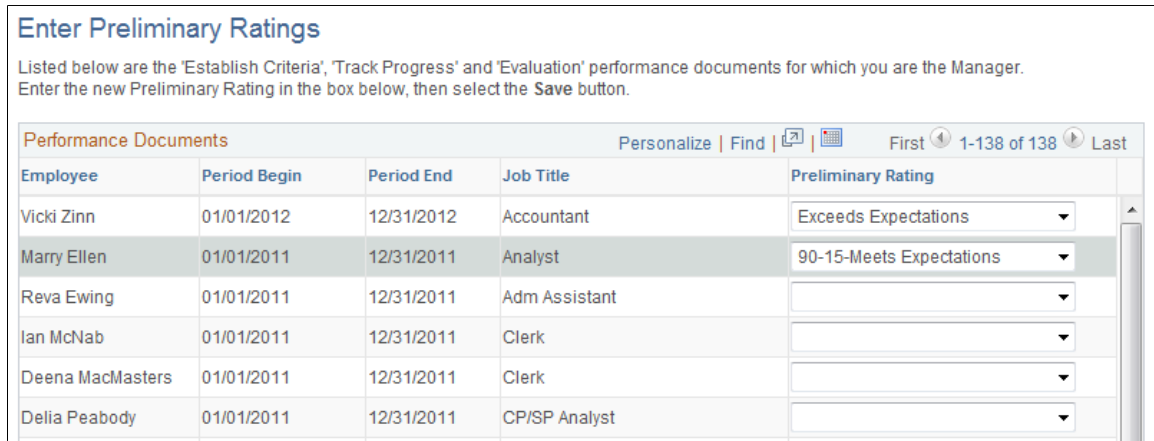
| Preliminary Rating | Enter a preliminary rating. The list of ratings from which you select is defined by the rating model that is associated with the Overall Summary section of the document. |

Related Links

"Defining Rating Models" (PeopleSoft HCM 9.2: Human Resources Manage Profiles)

Entering Performance Notes

This topic discusses how to enter performance notes in documents.

Pages Used to Enter Performance Notes

Page Name	Definition Name	Usage
Performance Notes Page or My Performance Notes Page	HR_NP_NOTE_SRCH	Search for and enter performance notes.
Performance Notes - Add/Update Notes Page	HR_NP_NOTE	Enter a new performance note. You can also view and modify an existing performance note on this page.
Performance Notes - Confirm Delete Page	HR_NP_MESSAGE	Confirm a delete of a performance note. In Notepad, when you delete an item that is associated with a note, the note is not actually deleted from Notepad. However, since the item doesn't exist on the document, the note is no longer associated with that item.
"Person Search Page" (PeopleSoft HCM 9.2: Application Fundamentals)	HR_PSS_SEARCH	Search for and select a recipient manager for a performance note transfer.

Related Links

"Configuring and Working with the HR Notepad" (PeopleSoft HCM 9.2: Application Fundamentals)

Performance Notes Page or My Performance Notes Page

Use the Performance Notes page or My Performance Notes page (HR_NP_NOTE_SRCH) to search for and enter performance notes.

Navigation

- Manager Self Service >Performance Management >Maintain Performance Notes >Performance Notes

- Self-Service >Performance Management >Performance Notes >My Performance Notes

Image: Performance Notes page

This example illustrates the fields and controls on the Performance Notes page.

Note: The two Performance Notes pages (manager and employee) work similarly, except that the My Performance Notes page enables employees to search for and enter notes on their own performance and the Performance Notes page enables managers to search for and enter notes on other employees.

Selection Criteria

To add or view performance notes for a specific employee, enter an ID and, optionally, a date range. If you do not specify dates, all notes for the employee regardless of date entered appear in the Existing Performance Notes for this Employee grid.

Note: The ID field appears only on the manager version of this page, since employees can only view their own notes.

Search	Click to view a list of performance notes that meet the search criteria.
Add New Note	Click to access the Performance Notes - Add/Update Notes page, where you can create a new note.

Existing Performance Notes for this Employee

This section lists all the performance notes that meet the search criteria.

Select	Click the check box associated with the note that you want to delete or transfer.
Subject	Click the link to access the Performance Notes - Add/Update Notes page and view or modify the details of the note.
Delete	Select one or more notes and then click this button to delete the note.
Transfer	Select one or more notes and then click this button to transfer the note to another manager. Use the Person Search - Simple page to search for the recipient or recipients of the note.

Performance Notes - Add/Update Notes Page

Use the Performance Notes - Add/Update Notes page (HR_NP_NOTE) to enter a new performance note. You can also view and modify an existing performance note on this page.

Navigation

Click the Add a New Note button on the Performance Notes or the My Performance Notes page.

Image: Performance Notes - Add/Update Notes page

This example illustrates the fields and controls on the Performance Notes - Add/Update Notes page.

Note: The note date for new notes is the current date. You cannot change the date. If you are updating an existing note, the system enters the current date and time when you click Save.

Subject   Enter the subject of the note.

Note Text   Enter the text of the note.

Inserting Performance Notes from Outlook

To insert a performance note to the PeopleSoft system from an email in Outlook:

1. Open the email in Outlook. Click the Dynamic Displays button in the PeopleSoft menu to open the PeopleSoft Enterprise pane on the right.

Image: Employee Adding Performance Note from Outlook

This example displays the interface that an employee uses to add performance note from an Outlook email message.
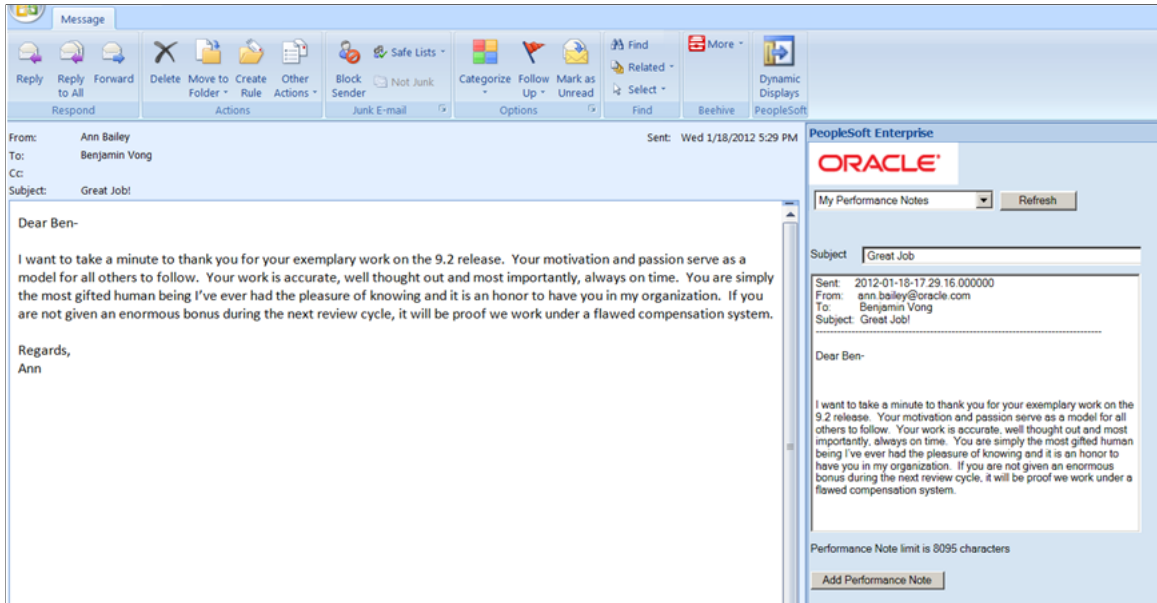
The email content is populated on the right. Click the Add Performance Note button to insert the email content as performance note.

2. (For manager) From the right pane, select whether you want to add performance note for your direct reports or other employees.

Image: Manager Adding Performance Note from Outlook

This example displays the interface that a manager uses to add performance note from an Outlook email message.
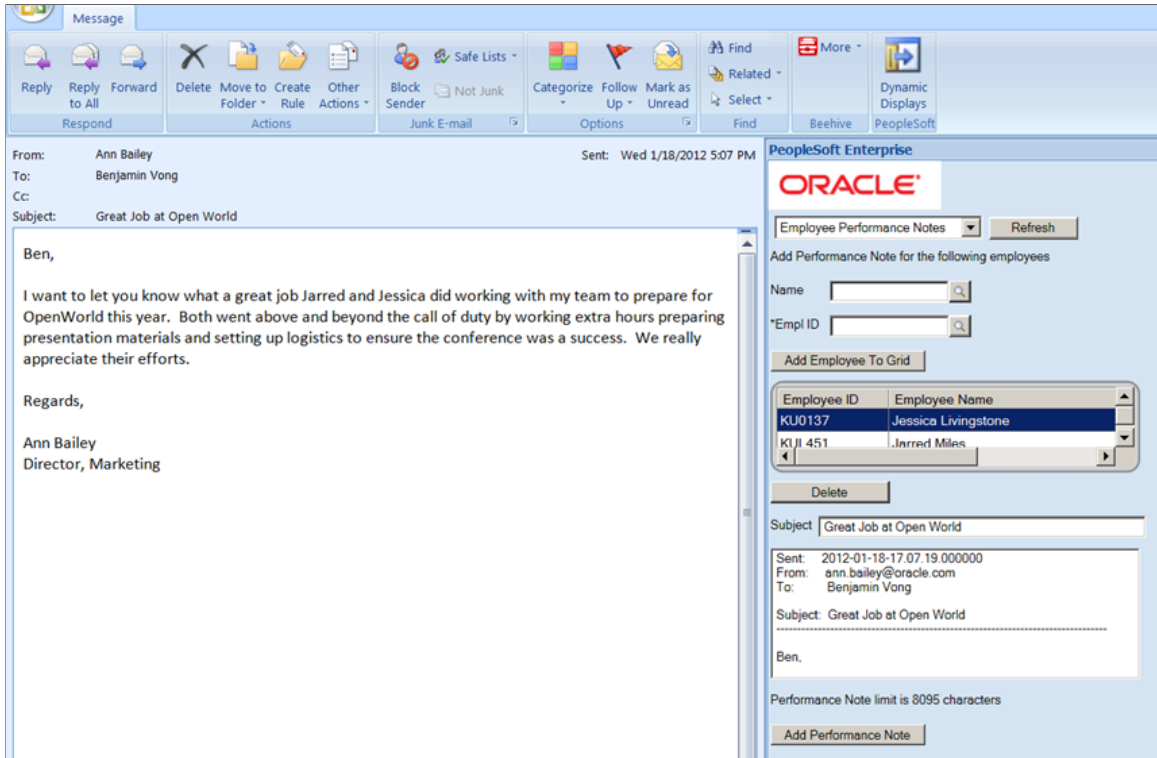
Then, search for one or more employees by name or employee ID for whom the note is inserted. To delete employee who was previously added, select the employee name in the grid and click the Delete button.

Click the Add Performance Note button to insert the email content as performance note for the selected employee(s).

Updating Evaluations

This topic lists prerequisites and discusses how to update evaluation details.

Note: In this section, a page or field title with a word in brackets indicates that the page takes its name from the context in which it appears.

Pages Used to Update Evaluations

Page Name	Definition Name	Usage
<Manager or Self-> Evaluation Page	EP_APPR_MAIN1	Enter and maintain evaluation data for an employee based on user role.

Page Name	Definition Name	Usage
Evaluation Page	EP_APPR_MAIN1	Provide evaluation feedback to another employee.
Add <section item> Page	EP_APPR_EDIT3	Add an item to the section (for example, goal, competency, and responsibility). If configured, you can add a predefined item, a free-form item, copy items from manager documents, another document of yours, and copy items from the Business Objectives page.
Add a Pre-Defined <section item> Page	EP_APPR_EDIT4	Add a predefined item to the section.
Add Your Own <section item> or Edit <section item> Page or Edit <section item> Page	EP_APPR_M_EDIT5	Update item details such as title, description, due date, level of difficulty, owner, supports, status, reminder date, percent complete, and flags indicating critical items.
Copy from Business Objectives Page	EP_APPR_EDIT9	Copy goals from established business objectives into a performance or development document.
Copy from Manager Document Page	EP_APPR_EDIT9	Copy goals, responsibilities, competencies and other items from the manager's document into a performance or development document.
Select a Document Page	EP_APPR_SEL_ADDITM	Select a document from which items can be copied to the current document.
Copy <section item> from My Documents or Copy <section item> from My Team's Documents Page	EP_APPR_EDIT9	Copy one or more items from the previously selected document to the current document.
Add a <section item> Behavior Page (EP_APPR_EDIT6)	EP_APPR_EDIT6	Select a behavior to add to the section item or enter a free-form behavior.
Add a <section item> Behavior or Edit <section item> Behavior Page	EP_APPR_M_EDIT8	Modify the behavior description for a section item.

Prerequisites

The evaluation phase of a document begins (during which the manager and employee provides feedback on respective evaluations) when the Define Criteria and Track Progress steps are completed (if they're enabled at the document template level). To enter evaluation data as a peer, you must have received and accepted a nomination to participate in the evaluation.

Related Links

Understanding Evaluation Criteria Modification
Understanding Mid-Period Checkpoints
Understanding the Nomination and Tracking Processes

Printing Manager Evaluation Documents with Participant Feedback

During the review process, managers often print out the evaluation documents prior to reviewing them with employees. If the document contains sections where the manager can view participant feedback, the system displays these print options for the manager to select when the manager clicks the Print icon on the evaluation document:

• Exclude participant feedback from the printed document (default value).

• Include participant feedback in document but hide participant's name.

  Participant names are masked in printed documents.

• Include participant feedback in document and display participant's name.

  This option is only available for selection if:

  • The Anonymity for Manager option is deselected in the Review Participant Evaluations section of the Template Definition - Process page for any user role.

  • The Display Names in Mgr Doc option is selected enabled on the Template Definition - Process page for any user role.

Participant feedback is not displayed to employees when they print out evaluation documents.

Exporting Manager Evaluation Documents with Participant Feedback

The Export option allows managers to download manager documents into Word or rich text format. Similar to the Print functionality, the system uses the anonymity and display options that are set up in the Review Participant Evaluations section of the Template Definition - Process page to determine how participant feedback should be included in the downloaded copy for the *Manager* role.

For managers, if they are not authorized to see participant names in the manager documents online (either the Anonymity for Manager option is enabled or the Display Names in Mgr Doc option is disabled), they will not see the names of participants in downloaded copies either. The setup for managers also applies to administrators.

Employees are not authorized to see participant feedback in downloaded copies.

<Manager or Self-> Evaluation Page

Use the Manager Evaluation page or Self-Evaluation page (EP_APPR_MAIN1) to enter and maintain evaluation data for an employee based on user role.

Navigation

Click to open a document that is in the *Evaluation in Progress* status on the (classic) Current Performance Documents, (classic) Current Development Documents, (fluid) Current Documents, or (fluid) My Current Documents page.

Image: Manager Evaluation page (1 of 4)

This example illustrates the fields and controls on the Manager Evaluation page (1 of 4).
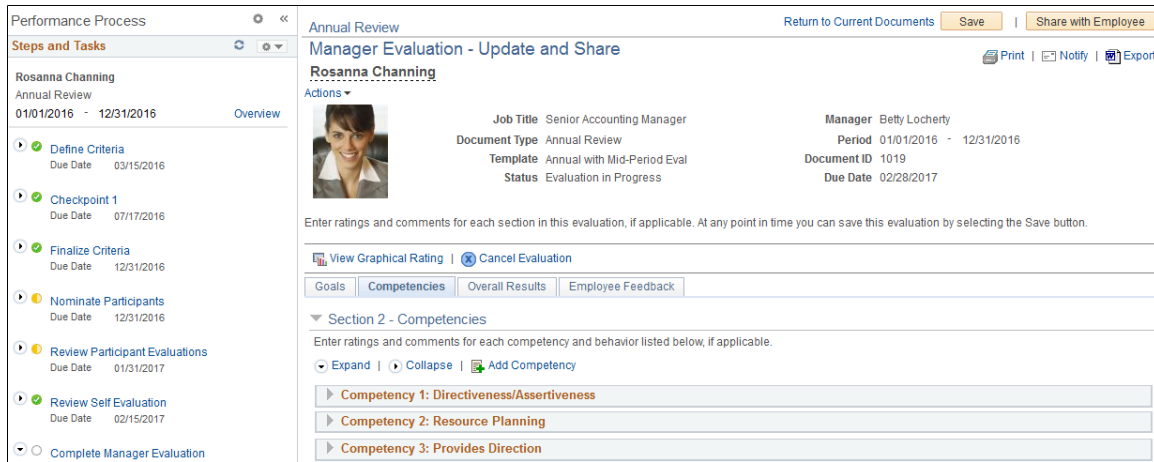
Image: Manager Evaluation page (2 of 4)

This example illustrates the fields and controls on the Manager Evaluation page (2 of 4).

Image: Manager Evaluation page (3 of 4)

This example illustrates the fields and controls on the Manager Evaluation page (3 of 4).
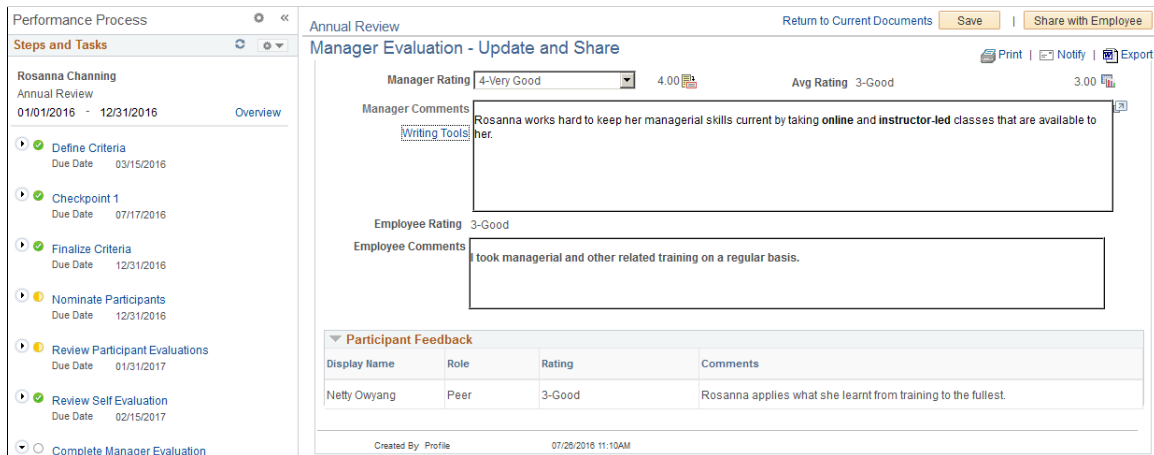
Image: Manager Evaluation page (4 of 4)

This example illustrates the fields and controls on the Manager Evaluation page (4 of 4).
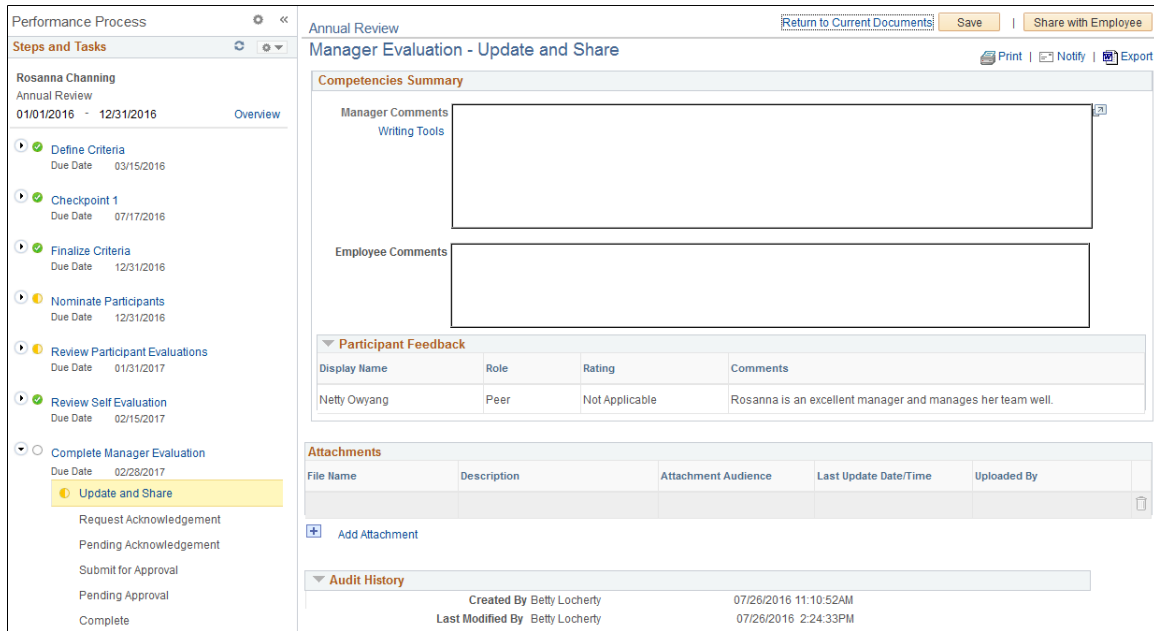
Image: Self-Evaluation page

This example illustrates the fields and controls on the Self-Evaluation page.
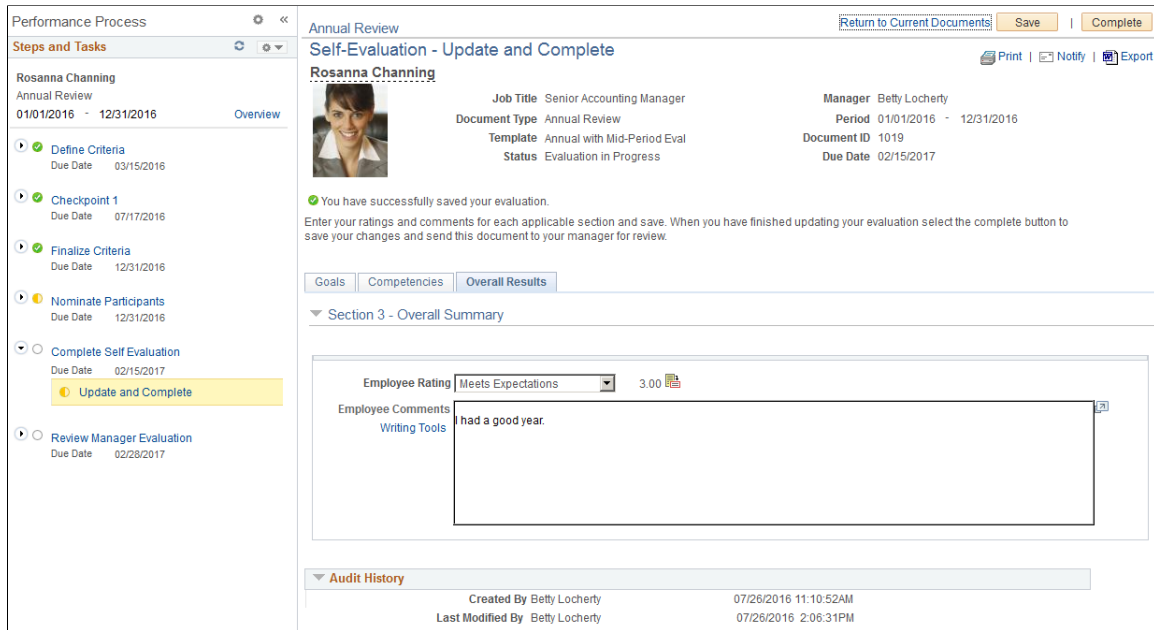
Consolidated Participant Feedback Display in Manager Evaluations

Note: The screenshots show the Manager Evaluation page and Self-Evaluation page as the example. The pages are displayed in the tabbed format.

For employee evaluations, the page is renamed Self-Evaluation page.

Evaluations are divided into sections, with each section containing a different type of content. Sections contain the items and subitems against which an employee's performance is evaluated and can include sections such as mission statement, goals and objectives, responsibilities, competencies, career summary, learning, employee comments, manager comments, signature lines, an overall summary, and organization-specific sections that you define.

Each *role* evaluation contains header information that identifies the role and the person who is evaluated. The header information also contains instructional text that changes depending on the role. The instructional text is system data that is supplied with PeopleSoft ePerformance, but you can modify this text by using the Text Catalog.

See "Understanding PeopleSoft HCM Common Components" (PeopleSoft HCM 9.2: Application Fundamentals).

Save	Click to save the evaluation and return to it later. The system calculates, according to template rules, all ratings that were entered prior to saving the review to the database.
	This button displays on an evaluation when the evaluation status is *Evaluation in Progress.*
Submit for Approval	Click to submit the evaluation to the designated approver according to the approval rules.
	This button is available (in manager evaluation) if the review process selected in the template of this document requires approval.
	Note: Prior to submitting an evaluation for approval, be sure to enter ratings for section items and summaries if such rating fields are available for edits.
	See Also Delivered Review and Approval Processes
Share with Employee	Click to submit the document for review by the employee, according to the review and approval rules.
	This button is available (in manager evaluation) if the review process selected in the template of this document requires employee review, and you have entered all required information.
	See Also Delivered Review and Approval Processes
Request Acknowledgement	Click to send a request to ask the employee for an acknowledgment that he or she has read and discussed the evaluation document with the manager.
	This button displays (in manager evaluation) if the review process selected in the template of this document requires employee review.
	See Also Delivered Review and Approval Processes

Override Acknowledgement   Click to cancel the acknowledgement request that was sent to the employee. Use this button if the employee is not available or refuse to provide acknowledgement to the evaluation and the manager needs to bypass this step. When clicked, the system moves the evaluation to the next step and changes the document status to *Acknowledged*.

This button displays (in manager evaluation) if the review process selected in the template of this document requires employee review, and an acknowledgement request has been sent.

See Also Delivered Review and Approval Processes

Acknowledge   Click to acknowledge that the employee has read and discussed the evaluation document with the manager.

This button displays (in employee self evaluation) if the review process selected in the template of this document requires employee review, and an acknowledgement request has been sent.

See Also Delivered Review and Approval Processes

Complete   Click to complete the evaluation.

Once an evaluation is completed, there is no further action that is specific to ePerformance for the manager or employee to take.

See Also Delivered Review and Approval Processes

Cancel   Click to cancel the changes you have made to the evaluation.

Print   Click the Print icon to view a printable version of the performance document. Clicking View Printable Evaluation generates a BI Publisher report that matches the document. The report can include the learning section, eSignature section, employee data, other participants and audit history. Use the browser's Print command to print a hard copy of the document. The eSignature section only exists in the BI Publisher report, it doesn't appear on the document.

Note: You must be the employee or an administrator to access the document.

See the Printing Manager Evaluation Documents with Participant Feedback topic for information on how the system handles the printing of manager evaluation with participant feedback.

Notify   Click the Notify icon to access the Send Notification page, where you can enter email addresses and a message to notify other interested parties.

Export	See the Exporting Manager Evaluation Documents with Participant Feedback topic for information on how the system handles the exportation of manager evaluation with participant feedback.

Employee Data

This section is available for employee evaluations and it displays employment information such as employee ID, department ID, years of service in the company, and years of service in the job for which the evaluations is created. The setup of this section is available in the Evaluations - Evaluation Document Header section of the Template Definition - General Page.

Rating History	Click to access the Rating History page (EP_HDR_RATING_ SEC) to view all of the past overall rating information for the employee for the same document type, if available.
View Graphical Rating	Click the View Graphical Rating icon to display:
	• The average rating report by role for each section, item and sub-item in the 360 Graphical View, if you click the icon in the header area.
	• The average rating report for a section item, if you click the icon within a section.
Cancel Evaluation	Click the Cancel Evaluation icon to move the current evaluation from a status of *Evaluation In Progress* to a status of *Canceled.*
	If the template was setup to update Profile Management and a manager cancels the evaluation, the system deletes all evaluations, employees and peers that might have already been sent to the Manage Profiles business process.
	If the employee cancels his or her evaluation, the system only deletes his or her evaluation from the Manage Profiles business process.
Reopen	Click to change the status to *Evaluation In Progress.*
	This button appears for managers and administrators when the evaluation has passed the *Evaluation in Progress* status but hasn't been completed.
	Also, a document cannot be reopened if it has been submitted for approval.
Check Language	Click to run the Language Checker tool. This button is available if the Language Checker button is selected on the Template Definition - General page.
	The Language Checker tool enables you to check a performance review for inappropriate language that is used in the manager's document. When inappropriate words are identified, the

Language Checker tool suggests alternative words or phases that are more acceptable from an organization's perspective.

Section # - <section name>

The fields and information that display in a section depends on the type of section, the special processing associated with the section, and the parameters selected on the Template Definition - Structure page. The system may also display data that was entered on the Template Definition - Content page, or data that was retrieved from the Job Profile Manager (JPM). In some cases you can edit this data.

Note: For a complete list of fields that can be configured to appear in this section, refer to the Defining Sections topic.

See the Define Criteria Page for additional field descriptions that are not mentioned in this topic.

Add <section item>	Click to add a new content item.
	The Add <section item> link displays if the Add check box is selected on the Section Roles grid, Item tab.
✏ Edit Details	Click the Edit Details icon to edit the detail information for the item. It is available on the evaluation if the Update check box is selected for the role in the Section Roles grid, Item tab for the section.
	See Edit <section item> Page.
🗑 Delete <item>	Click the Delete <item> icon to delete the content item. It is available if the Mandatory check box is not selected on the Template Definition - Content page.
	Note: This overrides the value in the Mandatory field on the job profile. If you specify that an item on the job profile is mandatory and do not select this check box, the item is not mandatory on the document.
Description	The Description label displays if the Description check box is selected on the Template Definition - Structure page. Content for the Description label displays if data is entered in the JPM_TEXT1325_1 field on the Content Items - Items Detail page (Set Up HCM >Product Related >Profile Management >Content Catalog >Content Items >Item Details).
Measurement	The Measurement label displays if the Measures check box is selected on the Template Definition - Structure page. Content for the Measurement label displays if data is entered in the JPM_TEXT1325_2 field on the Content Items - Items Detail page (Set Up HCM >Product Related >Profile Management >Content Catalog >Content Items >Item Details).

Measurement describes the criteria for measuring an employee's success at meeting this content item.

For example, if the goal is to reduce customer complaints by 5 percent, the measurement might be: "Based on the number of complaints received by Customer Support through December 31, as compared to complaints made in the previous year." You can change the information for free-form items, as needed.

Supports <item>

The Supports <item> label displays if the Supports check box is selected on the Template Definition - Structure page. Content for the Supports <item> label displays if a section is selected in the Link field on the Template Definition - Structure page and a content item is selected for the Supports field on the Template Definition - Content page.

This field is used to link goals to initiatives, or competencies to responsibilities, initiatives or goals.

Ownership

The Ownership label displays if the Ownership check box is selected on the Template Definition - Structure page. Content for the Ownership label displays if *Employee* or *Manager* is selected in the Owned By field on the Template Definition - Content page.

Reminder Date

The Reminder Date label displays if the Reminder Date check box is selected on the Template Definition - Structure page. Content for the Reminder Date label displays if a date is entered in the Reminder Date field on the Template Definition - Content page.

Due Date

The Due Date label displays if the Due Date check box is selected on the Template Definition - Structure page. Content for the Due Date label displays if a date is entered in the Reminder Date field on the Template Definition - Content page.

Target Rating

The Target Rating label displays if the Target Rating check box is selected on the Template Definition - Structure page. Content for the Target Rating label displays if a target rating is selected in the Target Rating field on the Template Definition - Content page.

Level of Difficulty

The system displays this field if the Level of Difficulty check box is selected on the Template Definition - Structure page. The Level of Difficulty field uses *Basic, Intermediate,* and *Advanced* as its values. When an item from the Content Catalog is added, this field displays the level of difficulty associated with that item and you cannot edit the values. If the item is manually added, you can select the level of difficulty unless the item is marked mandatory on the Template Definition - Content page.

Status	The Status label displays if the Status check box is selected on the Template Definition - Structure page.
Percent Complete	The Percent Complete label displays if the Percentage Completed check box is selected on the Template Definition - Structure page.
Critical	The Critical label displays if the Critical check box is selected on the Template Definition - Structure page. *Yes* or *No* displays as the content for the Critical label if it is defined on the Template Definition - Content page.
Stretch Goal	The Stretch Goal label displays if the Stretch Goal check box is selected on the Template Definition - Structure page.
Start Date and **End Date**	The Start Date and End Date labels display if the Start Date and End Date check boxes are selected on the Template Definition - Structure page.
Private	The Private label displays if the Private - hide from employees check box is selected on the Template Definition - Structure page.
Rating	This field displays if the Rate check box is selected for the section and the applicable Rate Section, Rate Item, or Rate Sub-Item check box is selected in the Final Evaluation Step – Role Rules grid, Rate/Weight tab. View or enter ratings. The action that is permitted depends on the level (subitem, item, section) where the field occurs if calculation is enabled in the document template, and the user actions that the template definition permits. For example, at the overall summary and section summary levels, the rating field is read-only unless the role has permission to override system-calculated ratings or calculate field was not enabled on the document template. **Note:** In the Rating Display field on the Template Definition - Structure page you can select *Radio Buttons* to display ratings as radio bullets or you can select *Drop-Down Box* to display ratings in a drop-down list.
Calculate Rating	Click the Calculate Rating icon to calculate ratings. This icon is available in the <content item> Summary group box and Overall Summary section.
Override	Click to override a system-calculated rating or remove an existing override. The button appears at the following levels on the performance review page, depending on the template definition: • At the item level within a section, to override the system-calculated average of individual subitem ratings.

- At the section summary level to override the system-calculated average of individual item ratings.

- At the overall performance review summary level, to override the system-calculated average of individual section ratings.

Note: An override that you enter remains in place until you remove it. To have the system recalculate the rating, remove the override.

Add Behavior	Click to add a new behavior.
	The Add Behavior link displays if Subitems are enabled on the Template Definition - Structure page.
Participant Ratings	Click to view review any participant's evaluation rating for the corresponding subitem, if the information is available.
Weight	The Weight field displays if the Weight check box is selected for the section and the applicable Weight Section or Weight Item check box is selected in the Final Evaluation Step – Role Rules grid, Rate/Weight tab.
	Enter the weight of an item relative to the other items in the same section or relative to other sections in the evaluation.

Note: The sum of the weights for all items in a section or all sections in a document, must equal 100 percent in the manager's document.

Manager Rating	Enter the rating for the item as the manager.
▣ **Rating Description**	Click the Rating Description icon to display a page that provides an explanation of the rating.
	From this page you can select the rating that best describes the employee's proficiency. The system displays either the description entered on the Rating Explanation page or the proficiency description entered on the Content Item page. If the system finds there is a rating explanation and a proficiency description, the proficiency description has precedence over the rating explanation.
Avg Rating (average rating)	The Avg Rating label displays if the View Average Rating check box is selected on the Template Definition - Process page.
▣ **View Graphical Rating**	Click the View Graphical Rating icon to display the Average Ratings report in a modal window. It is available if the View Average Rating check box is selected on the Template Definition - Process page.
Manager Comments	Enter comments about employee's performance relative to the corresponding section or item from a manager's perspective.

The Manager Comments field appears if the Comments check box is selected in the Final Evaluation Step – Role Rules grid, Section tab or Item tab. As you enter comments, access to spell checker is always available. Access to writing tools may also be available if they are set up at the template level.

This field is displayed as read-only, if the Enable Rich Text in Modal only option is enabled on the ePerformance Page (EP_INSTALLATION) at the installation level. In this case, enter your comments by clicking the Writing Tools or Edit Comments link, whichever is displayed.

Writing Tools   Click this link to access the Writing Tools - Suggested Results Page where you can select suggested texts as comments, or enter feedback manually. This page displays a list of related text entries that you can include in the Comments text field, which supports both plain and rich text editing. You may also select additional content to be considered as comments, such as performance notes, comments from other people, results writer and development tips statements.

The Writing Tools link appears if the role of the user is enabled at the template level to view suggestions for sections and items from any of these categories: results writer entries, development tips, other evaluators' comments (manager only), and performance notes. Note that any performance notes that the employee or manager recorded from within the Define Criteria step about the employee also appear in this list if enabled, but are restricted to the user's own role. In other words, the employee does not have access to notes that the manager has recorded about him or her, and the manager cannot see notes from the employee.

Edit Comments   Click this link to open a modal page (EP_EDIT_COMMENTS) to enter plain or rich text comments for the corresponding section or item.

This link appears, if the Enable Rich Text in Modal only option is enabled and the role of the user is not enabled to view any suggested text (results writer entries, development tips, other evaluators' comments, and performance notes).

Note: If you copy and paste content into the rich text-enabled comments field, please be advised that the sequencing of any numbered or bulleted lists that are two or more levels deep in the content may not be copied over properly. It is a known issue reported for the third-party editor that PeopleTools uses. Until a fix becomes available, avoid having two or more levels of numbered or bulleted lists in your copied content. Or, always review the sequencing of lists (and make edits manually if necessary) in the comments field before saving the document.

Spell Check Comments

Click the Spell Check Comments icon to check the spelling of the text entered in the Comments field.

Employee Rating

This field displays if the Employee Rating check box is selected for the section in the Final Evaluation Step – Role Rules grid, Rate/Weight tab of the template definition.

This field shows the rating that was entered in the employee's self evaluation in the manager's evaluation document.

Employee Comments

The Employee Comments field displays if the Employee Comments check box is selected for the section in the Final Evaluation Step – Role Rules grid, Section tab or Item tab.

This field displays comments that were entered in the employee's self evaluation in the manager's evaluation document.

Learning Name

Click this link to display the <learning name> Description page in the Enterprise Learning Management database. This link appears only in Learning sections.

Find Learning Gaps

Click this link to access the Enterprise Learning Management database. Based on the role of the user, clicking the Find Learning Gaps link opens one of these ELM pages:

- For employees, it opens the Learning Objectives - Current Objectives (LM_OBJV_LRNR) page.

- For managers, it opens the Team Members Objectives - Current Objectives (LM_OBJV_MTM) page.

- For administrators, it opens the Enroll Learners - Find Requester (LM_CALL_CENTER_REQ) page.

Only competencies with blank Target Ratings trigger the gap analysis process. Competencies with Target Ratings that are not met are added as learning objectives for the learner without doing a comparison.

Note: This link appears only in Learning sections.

Calculate All Ratings

Click to calculate all of the item and section ratings, as well as the overall rating that appears on the performance document. Ratings are not calculated for items, sections, or summaries that are overridden.

The system enables this button if the section has the Rate check box selected on the Template Definition - Structure page and ratings have been entered for sections, items, or subitems.

Participant Feedback

This collapsible section lists the completed evaluation feedback that are provided by people other than the employee and the manager. The section is applicable *only* to manager evaluations, and it appears if *all* these conditions are met:

1. The user who is currently logged in to view the manager document is a manager, an administrator, or an indirect manager (who views the document in the view-only mode).

2. The Participant Feedback option is selected in the document template, under the Final Evaluation Step – Role Rules - Section tab on the Structure page for the corresponding section.

3. One or more of these role rule options are enabled for participants (for example, *Peer* or *Other*) for the section being viewed:

   • Rate section, item, or sub-items

   • Enter comments for section or item

For example, if the role rule options for entering ratings and comments at the item level are enabled for the Goals section in the document, the system displays the Participant Feedback section for all items in the Goals section only when the manager accesses it.

When enabled and displayed at the sub-item level, this section is called *Participant Ratings*. It shows the name, role, and rating of each evaluator feedback.

Participant	Displays the name of the person who provided the evaluation.
	If the Anonymity for Manager option is enabled for the role that the participant has, the system masks his or her name and the name is displayed in this format: *<role name> <number>*. For example, *Peer 1* or *Other 2*.
Role	Displays the role of the evaluator. For example, *Peer*, *Other*, and so on.
Rating	Displays the description for the rating given by the evaluator (if available) for the level being viewed.
	If the evaluator is not allowed to rate, this field value reads *N/A*.
	If the evaluator is allowed to rate but didn't enter a rating, this field value is blank.
Comments	Displays the comment given by each evaluator for the level being viewed.
	This is not available to participant feedback at the sub-item level.

Attachments

This section appears on the Manager Evaluation page if the Allow Manager Attachments option is enabled on the Template Definition - Process Page of the associated template. Similarly, the section is displayed on the Self-Evaluation page if the Allow Employee Attachments option is enabled.

Click the Add Attachment link to upload an attachment to the evaluation document. Once you select an attachment and the file is uploaded, the system transfers you back to the document where you can enter a file description and specify user role permission (attachment audience) for the attachment.
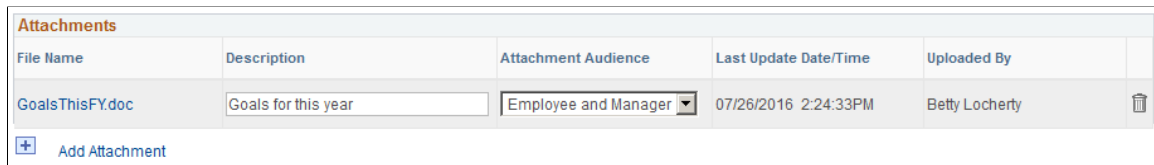
While an evaluation document is in progress, the author (a manager in the case of a manager evaluation, or an employee in the case of a self-evaluation) can add or delete attachments to it, and specify who can see these attachments once the evaluation document is completed and being viewed by others.

When a self-evaluation, currently in progress, is viewed by a manager, attachments are hidden. After the self-evaluation is completed, the manager can see the attachments that are given manager access, and has the option to copy them to the manager evaluation that is in progress, if necessary.

The Attachments section is displayed as read-only on completed manager evaluations or self-evaluations. A person who is viewing a completed evaluation document will be able to view attachments that list his or her user role as attachment audience. For example, a manager will have access all attachments (including the ones copied from self-evaluations) that are marked for manager access, and an employee will not see files on a manager evaluation that are marked for manager access only.

Image: Attachments group box of the Manager Evaluation or Self-Evaluation page

This example illustrates the fields and controls on the Attachments group box of the <Manager or Self> Evaluation page.

Attachments					
File Name	**Description**	**Attachment Audience**	**Last Update Date/Time**	**Uploaded By**	
GoalsThisFY.doc	Goals for this year	Employee and Manager ▼	07/26/2016 2:24:33PM	Betty Locherty	🗑
➕ Add Attachment					

File Name	Displays the name of the file with a link to the file that was uploaded.
	Files with the same name are uploaded in separate entries.
Description	Use this field to enter a description of the file that you uploaded.
Attachment Audience	Select the roles of users who can view and download the file once the evaluation document is completed and being viewed by other users.
	If you select *Employee and Manager,* the file can be viewed and downloaded by the employee, manager, the manager's upward management chain, and the ePerformance administrator.
	If you select *Manager Only,* the file can only be viewed and downloaded by the manager, the manager's upward management chain, and the ePerformance administrator.
	If the field is left blank, the file is accessible only to the user role who uploaded the attachment.
Last Update Date/Time	Displays the date and time the manager uploaded the file to the document.
Uploaded By	Displays the name of the manager that uploaded the file to the document.

🗑 **Delete**

Click the Delete icon to delete the attachments. You can only do this when the document status is *In Progress*.

Save (save to manager evaluation)

(For managers) Click to save a copy of the attachment file from a self-evaluation to the manager evaluation.

This button appears after the document status has moved past *Evaluation in Progress*, and is visible on employee self-evaluations only. Manager evaluations must also be configured to allow attachments at the template level to support this feature.

Audit History

See Understanding Document Audits.

Related Links

Add <section item> Page
Add Your Own <section item> or Edit <section item> Page
Copy from Business Objectives Page
Copy from Manager Document Page
Select a Document Page
Copy <section item> from My Documents or Copy <section item> from My Team's Documents Page

Evaluation Page

Use the Evaluation page (EP_APPR_MAIN1) to provide evaluation feedback to another employee.

Navigation

• (Fluid) Click the Performance tile on the Employee Self Service home page. Click the Evaluations of Others tab on the left panel of the Performance page that appears.

• (Classic) Self Service >Performance Management >Other's Performance Documents >Current Evaluations

• (Classic) Self Service >Performance Management >Other's Development Documents >Current Evaluations

Click an employee link on the My Current Evaluations for Others page.

Image: Evaluation page (1 of 2)

This example illustrates the fields and controls on the Evaluation page (1 of 2).
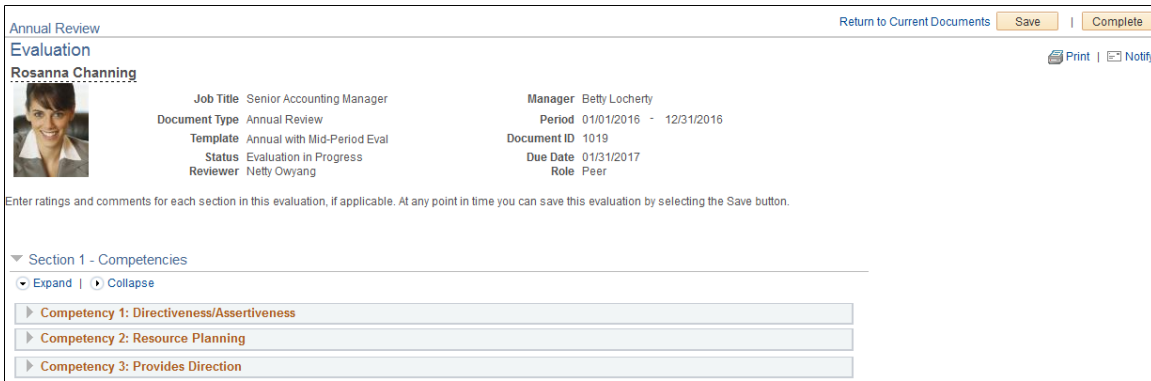
Image: Evaluation page (2 of 2)

This example illustrates the fields and controls on the Evaluation page (2 of 2).
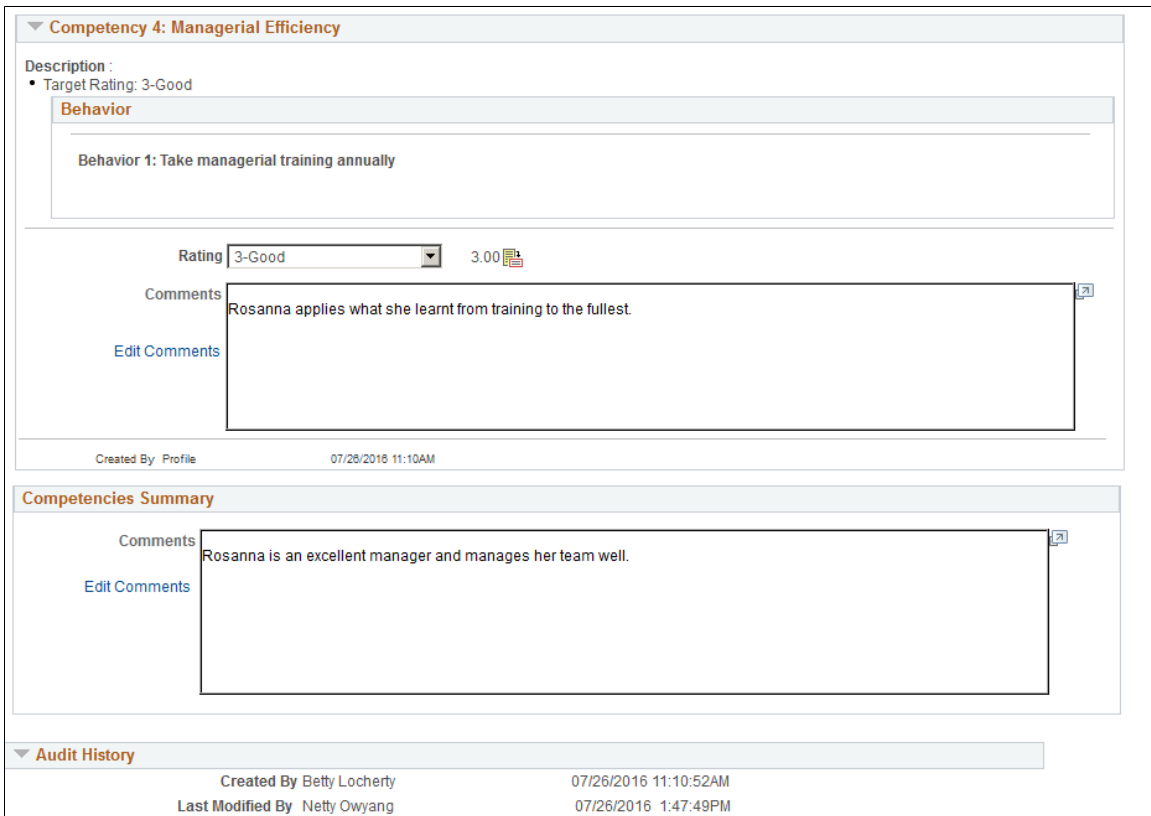
The look and feel of the Evaluation page is similar to the Self Evaluation or Manager Evaluation page, although it is not displayed in WorkCenter like the other evaluation pages.

A peer provides feedback for an employee by filling in information against the listed evaluation criteria on the page and click the Complete button when the evaluation is finished.

Refer to the <Manager or Self-> Evaluation Page topic for field descriptions on this page.

Edit <section item> Page

Use the Edit <section item> page (EP_APPR_M_EDIT5) to update item details such as title, description, due date, level of difficulty, owner, supports, status, reminder date, percent complete, and flags indicating critical items.

Navigation

Click the Edit Details icon of a section item on an evaluation.

Image: Edit <section item> page

This example illustrates the fields and controls on the Edit <section item> page.

Use this page to change the evaluation details for the item.

Note: The fields that appear on this page will be different based on the items you select and the way that you set up your document template. You can configure the document template to enable an evaluator to change the value of any field except Title, Description, and Measurement. The evaluator can modify these fields only if the item is not coded (stored in a system table). The values that initially appear for detail fields are set on the Content page of the document template.
For a complete list of fields that can be configured to appear in this section, refer to Defining Sections.

Title	Displays the title of the item.
Description	Displays a description of the item.
Level of Difficulty	The system displays this field if the Level of Difficulty check box is selected on the Template Definition - Structure page. The Level of Difficulty field uses *Basic, Intermediate,* and *Advanced* as its values. When an item from the Content Catalog is added, this field displays the level of difficulty associated with that item and you cannot edit the values. If the item is manually added, you can select the level of difficulty unless the item is marked mandatory on the Template Definition - Content page.

Ownership   Select a value to indicate who is responsible for the item.

Status   Select a value to indicate the status of the item. Possible values are *Complete, In Progress,* and *N/A* (not applicable).

Percent Complete   Enter the completion percentage for an item that appears on the performance document.

Due Date   Enter the date when a particular goal or item should be completed.

Reminder Date   Enter a date. This field is used for informational purposes only.

Start Date and **End Date**   Enter the beginning and ending dates for the item.

Critical   Select this check box to have the label Critical appear in the detail area of the item on the evaluation.

Stretch Goal   Select this check box to have the label Stretch Goal appear in the detail area of the item on the evaluation.

Chapter 14

Consolidating Feedback from Evaluators

Understanding Feedback Consolidation

This topic discusses:

- Feedback consolidation.

- Ratings.

- View Other Authors.

- Writing Tools.

- Language Checker Tool.

- Reviews and Approvals.

Feedback Consolidation

Image: Consolidate feedback process showing how the system integrates feedback from completed employee, peer, and manager evaluations

This diagram shows the high-level process for consolidating feedback from completed employee, peer, and manager evaluations:
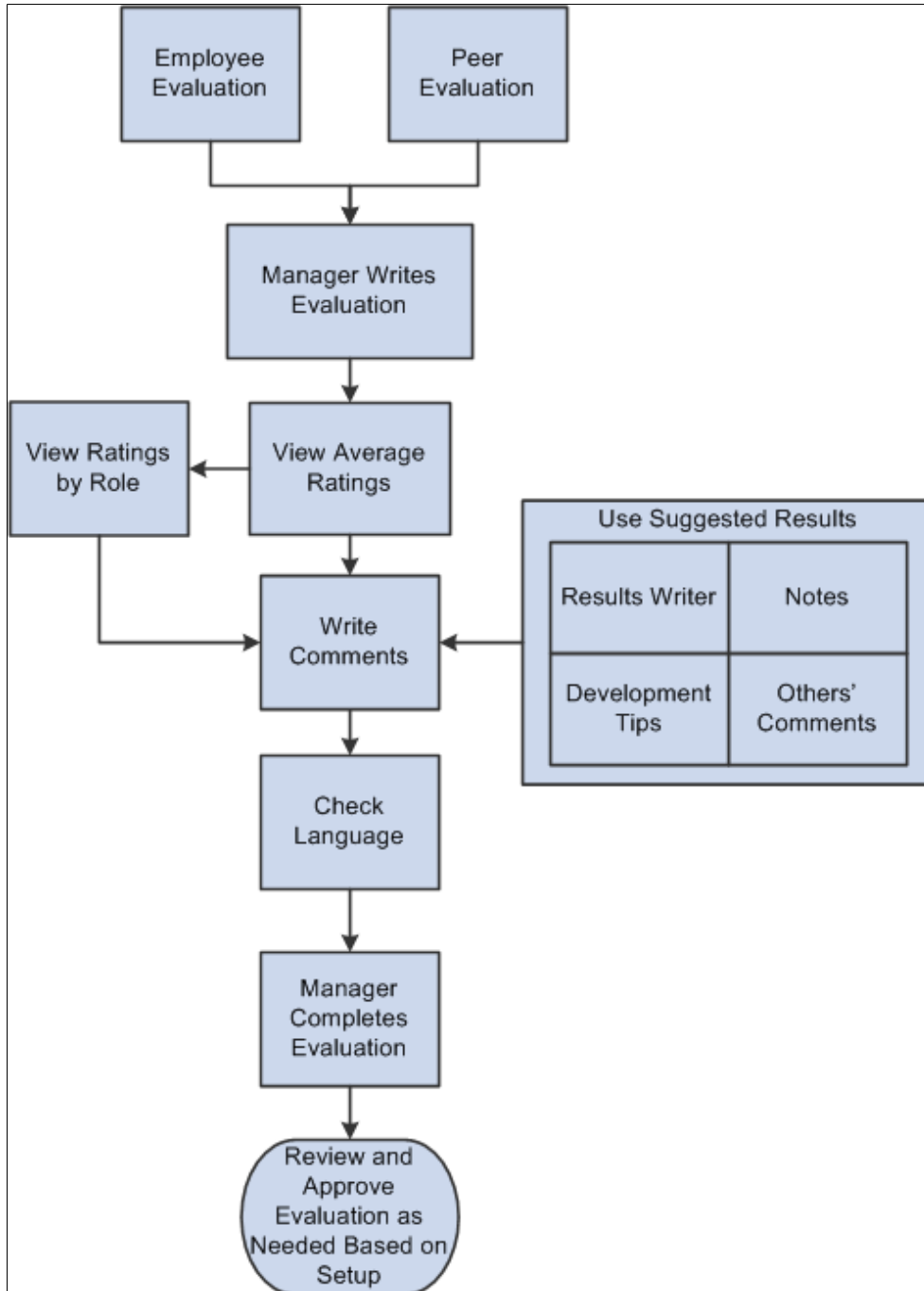
Although managers can rate items, add comments to their evaluations, and record notes at any time during the evaluation cycle, they must perform additional steps to finalize and complete evaluations. These steps include writing final evaluation comments and conducting reviews and approvals, if required.

Ratings

Ratings are entered at the section, item, or subitem level, as defined on the document template. If the document is set up to automatically calculate ratings, ratings from lower levels are averaged and rolled up to the higher levels. The manager rating (calculated or manually entered) on the manager's evaluation is used by the writing tools to select appropriate text.

View Other Participant's Feedback

Managers can view comments and ratings there were entered by other evaluators in other roles while working on the manager's evaluation.

To enable this functionality, select the Participant Feedback check box for the role and section in the Final Evaluation Step - Role Rules: Section group box on the <u>Template Definition - Structure Page</u>. The Participant Feedback group box appears for the section and when expanded, shows the names, roles, ratings and comments of that section that were entered by other reviewers of the evaluation. Only information of completed evaluations is available for display.

Writing Tools

The Writing Tools link accesses the Suggested Results page, which contains text suggestions that assist evaluators in writing comments. These suggestions can come from any of several different sources, provided that as they are enabled for the section or item on the document template.

The Suggested Results page presents the text items that are most directly related to the section and item. You can also select a tool from the available options in the Find Additional Content field to use an advanced search for text that is not directly related to the section, item and rating from which you accessed the writing tools. This enables you to search for text suggestions from any text source that is defined on the document template for the section or item.

These are the possible sources for text suggestions:

- Results Writer

  Results writer statements are predefined statements that describe an employee's proficiency for a given competency or sub-competency. These statements appear on the Suggested Results page for competency sections only, but you can locate results statements for other sections by using the advanced search.

- Development Tips

  Development Tips consist of predefined statements that provide tips on how employees can develop their proficiency. Development tips are related to competencies and sub-competencies, but can apply to other evaluation criteria as well. You must rate a section or item before development tips appear.

- Comments

  A manager can view comments that evaluators in other roles entered for the same section and item. Comments from another evaluator appear only if the role's evaluation status is *Complete*.

  - If you access the Suggested Results page from an item, all comments from complete evaluations for the item appear.

  - If you access the Suggested Results page from a section, only the comments from complete evaluations for the section appear. Comments do not appear at the item level.

- Performance Notes

   The performance notes that were entered during for an item the Define Criteria and Track Progress steps are available on the Suggested Results page, and are available only to the person who entered the note.

   Note: Employees and managers can also enter notes that are not directly tied to an evaluation. You can search for these notes using advanced search capabilities.

Language Checker Tool

The Language Checker tool alerts managers to inappropriate language that appears in a manager's evaluation and suggests alternative language. It is enabled on the document template for an evaluation as a whole and is not turned off or on at the section or item level.

Reviews and Approvals

Employee reviews and management approvals are not required in all cases. If they are required, the manager's evaluation is the one that is reviewed and approved, and the status of this document reflects the review and approval status.

Related Links

Creating Document Templates
Understanding Advisor Tools
Understanding Evaluation Data Entry
Understanding Review and Approval Processes

Viewing Evaluation Ratings

This topic discusses how to view evaluation ratings.

Pages Used to View Evaluation Ratings

Page Name	*Definition Name*	*Usage*
<Manager or Self-> Evaluation Page	EP_APPR_MAIN1	View section and item ratings.
Average Ratings Page	EP_AVG_CHART	View evaluation ratings by role in a modal window.
Graphical Ratings Report Page	EP_360_REPORT	View a summary report that contains the average ratings chart from every section and item on the evaluation.

Average Ratings Page

Use the Average Ratings page (EP_AVG_CHART) to view evaluation ratings by role in a modal window.

Navigation

Click the View Graphical Rating icon that appears next to the Average Rating field of a section item on the Manager Evaluation page.

Image: Average Ratings page

This example illustrates the fields and controls on the Average Ratings page.

This chart lists the average ratings, by role, from all participants that rated a section, item, or subitem. Summary ratings are rolled up from lower-level ratings. The number in parentheses next to the role lists how many participants in that role are included in the average.

This page is available only from the Manager evaluation, and only if the role has the View Average Ratings check box selected on the Template Definition - Process page.

Note: A summary report containing all the Average Ratings page for an evaluation is available. To view it, click the View Graphical Rating icon that is displayed (if available) below the header area of the evaluation.

Working with Writing Tools

This topic discusses how to work with writing tools when entering evaluations.

Note: All roles can access the writing tools, The navigation paths given here apply to the manager self-service pages because the manager's evaluation is the most common use of these tools. However, these tools are also available from other roles' evaluations if they are enabled for the role on the document template.

Pages Used to Work with Writing Tools

Page Name	Definition Name	Usage
Writing Tools - Suggested Results Page	EP_SUGGEST_RESULTS	Incorporate text suggestions into comments.
Writing Tools - Results Writer Statements Page	EP_ADV_RESULT_WRT	Search for competency and sub-competency performance descriptions for a section or item.
Writing Tools - Development Tips Page	EP_DEV_TIPS	Search for development tips for a section or item.
Writing Tools - Performance Notes Page	EP_PERF_NOTEPAD	Search for performance notes that you previously entered.
Writing Tools - Evaluators' Comments Page	EP_OTHER_COMMENTS	Search for other evaluators' comments that were entered for the employee.
Check Language Page	EP_LANG_CHECK_SEC	Check for inappropriate language within a review and review suggested alternatives. If the Language Checker feature is enabled on the document template, the Check Language button appears at the bottom of the Manager Evaluation page.

Related Links

Understanding Advisor Tools

Writing Tools - Suggested Results Page

Use the Writing Tools – Suggested Results page (EP_SUGGEST_RESULTS) page to incorporate text suggestions into comments.

Navigation

Click to open a document that is in the *Evaluation in Progress* status on the (classic) Current Performance Documents, (classic) Current Development Documents, (fluid) Current Documents, or (fluid) My Current Documents page. Click the Writing Tools link in any section or subsection where it appears.

Image: Writing Tools - Suggested Results page

This example illustrates the fields and controls on the Writing Tools - Suggested Results page.

Suggested Results

This grid displays suggested texts that the system returns for you to reference in the evaluation. They can be:

- Results Writer text.

- Development tips.

- Performance Notes.

- Comments from other evaluators.

You can select one or more comments and click the Add to Comments button to add them to the comments for this section. Comments are added without line breaks — you must manually insert line breaks to start each comment on a new line.

Add to Comments	Click this button to incorporate the suggested text into the Comments field.

Comments	Use this field to incorporate text from any of the writing tools that are available to you. You can modify the text after you incorporate it.
Find Additional Content and **Go**	Select the writing tool you want to use to find additional suggestions for the comment. This field enables you to find other text items to incorporate into the comments box, in the case that you don't find suitable text in the Suggested Results list. Only tools that are enabled for the role on the document template appear. Click Go after you select an option.

Related Links

Template Setup for Using Results Writer and Development Tips

Writing Tools - Results Writer Statements Page

Use the Writing Tools - Results Writer Statements page (EP_ADV_RESULT_WRT) to search for competency and sub-competency performance descriptions for a section or item.

Navigation

Select *Results Writer* from the available options in the Find Additional Content field on the Writing Tools - Suggested Results page; then click Go.

Image: Writing Tools - Results Writer Statements page

This example illustrates the fields and controls on the Writing Tools - Results Writer Statements page.

Search for text	Enter a keyword to limit the suggestions returned. You can search for text independently without entering competency, sub-competency, or rating.
Competency	Select the competency for which to search. If you search by competency, you can further refine the search by entering a sub-competency or a review rating.
Sub-Competency	Select the sub-competency for which to search. This field appears only if you select a competency that has sub-competencies and if the document template is set up to search sub-competency data for the section.
Review Rating	Select the review rating for which to return text suggestions that are linked to competencies or sub-competencies. You must enter a competency or sub-competency before you can enter a rating.

Writing Tools - Development Tips Page

Use the Writing Tools - Development Tips page (EP_DEV_TIPS) to search for development tips for a section or item.

Navigation

Select *Development Tips* from the available options in the Find Additional Content field on the Writing Tools – Suggested Results page; then click Go.

Image: Writing Tools - Development Tips page (1 of 2)

This example illustrates the fields and controls on the Writing Tools - Development Tips page (1 of 2).
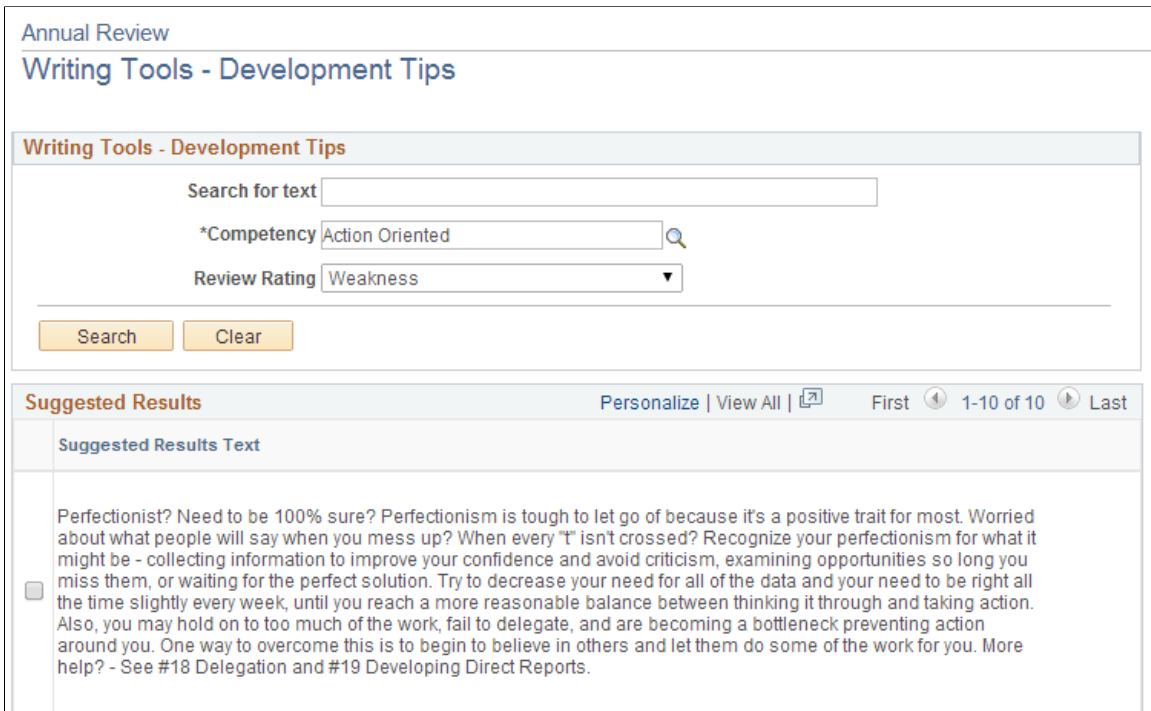
Image: Writing Tools - Development Tips page (2 of 2)

This example illustrates the fields and controls on the Writing Tools - Development Tips page (2 of 2).

Search for text	Enter a keyword to limit the suggestions returned. You can search for text independently without entering competency, sub-competency, or rating.
Competency	Select the competency for which to search. If you search by competency, you can further refine the search by entering a sub-competency or a review rating.
Sub-Competency	Select the sub-competency for which to search. This field appears only if you select a competency that has sub-competencies and if the document template is set up to search sub-competency data for the section.
Review Rating	Select the review rating for which to return text suggestions that are linked to competencies or sub-competencies. You must enter a competency or sub-competency before you can enter a rating.

Writing Tools - Performance Notes Page

Use the Writing Tools – Performance Notes page (EP_PERF_NOTEPAD) to search for performance notes that you previously entered.

Navigation

Select *Performance Notes* from the available options in the Find Additional Content field on the Writing Tools – Suggested Results page; then click Go.

Image: Writing Tools - Performance Notes page

This example illustrates the fields and controls on the Writing Tools - Performance Notes page.

Use this page to search performance notes that you recorded. You can only search for those notes that you entered. Employees cannot retrieve notes that their manager entered about them; and managers cannot retrieve notes that their employees entered.

Performance notes that are recorded as part of the Establish Criteria step are stored with the particular section and item to which they pertain, and appear on the Suggested Results page.

Date Range and **Search**	Enter a date range to limit the search for performance notes. Click Search. All notes that you entered within the date range appear in the Results grid.
Add to Comments	Select the note that you want to add to the Comments section and then click this button. The system adds the note to the Comments field. You can edit the text that appears in the Comments field.
Save and Return	Click this button to save your comments and return to the Evaluation page.

Related Links

Entering Performance Notes

Writing Tools - Evaluators' Comments Page

Use the Writing Tools - Evaluators' Comments page (EP_OTHER_COMMENTS) to search for other evaluators' comments that were entered for the employee.

Navigation

Select *Other Evaluators' Comments* from the available options in the Find Additional Content field on the Writing Tools – Suggested Results page; then click Go.

Image: Writing Tools - Evaluators' Comments page

This example illustrates the fields and controls on the Writing Tools - Evaluators' Comments page.

Use this page to search for comments that were entered by evaluators who are not the manager or employee.

Role	Select the evaluator role. Only roles that are defined on the document template appear.
Name	Select the person whose comments you want to view. You must first select the role before you can select a name.
Document Section	Select a document section to view comments that were made for that section by any evaluator in any role.
Search	Click to display results based on the criteria you entered.
Suggested Results	This grid can contain any or all of these items:
	• Results Writer text.

- Development tips.

- Notes.

- Comments from other evaluators.

You can select one or more comments and click the Add to Comments button to add them to the comments for this section. Comments are added without line breaks; you must manually insert line breaks to start each comment on a new line.

Add to Comments	Click this button to incorporate suggested text into the Comments field.
Comments	Use this field to incorporate text from any of the writing tools that are available to you. You can modify the text after you incorporate it.
Find Additional Content and **Go**	Select the writing tool you want to use to find additional suggestions for the comment. This field enables you to find other text items to incorporate into the comments box, in the case that you don't find suitable text in the Suggested Results list. Only tools that are enabled for the role on the document template appear. Click Go after you select an option.

Check Language Page

Use the Check Language page (EP_LANG_CHECK_SEC) to check for inappropriate language within a review and review suggested alternatives.

Navigation

Click the Check Language button at the header of the manager's performance document.

Image: Check Language page

This example illustrates the fields and controls on the Check Language page.
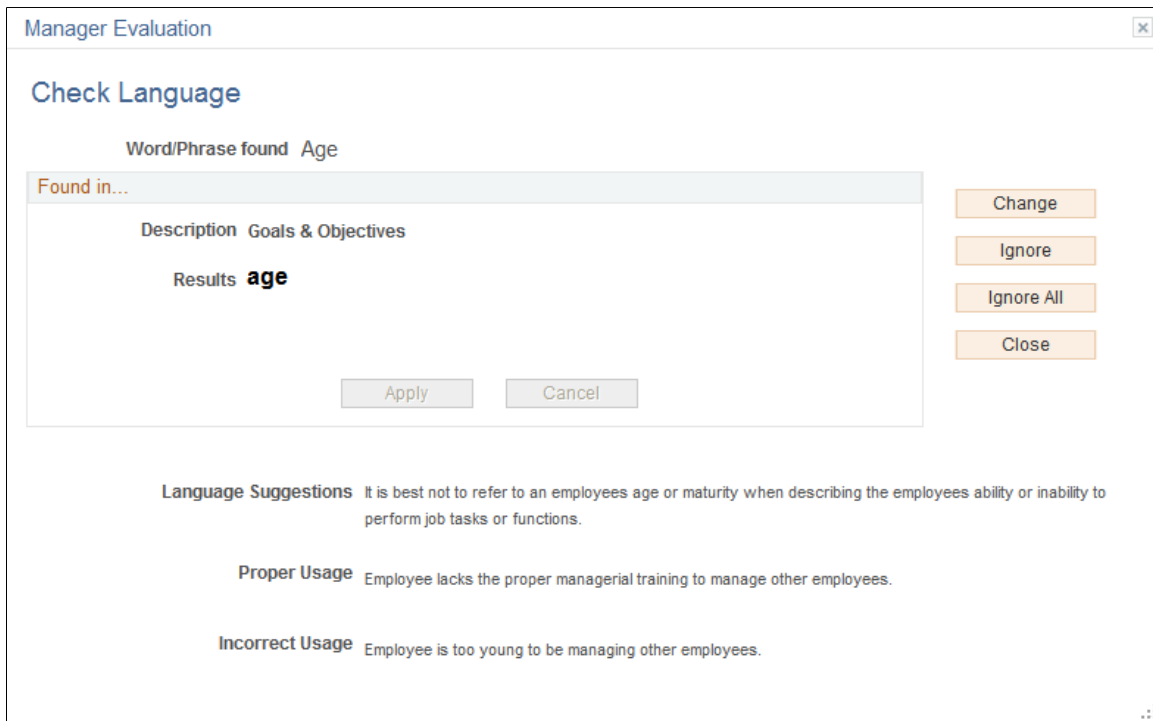
The word or phrase that's deemed inappropriate appears at the top of the page. The sentence in which it is used is shown below it.

Change	Click this button to edit the sentence.
Ignore	Click this button to view the next sentence.
Ignore All	Click this button to ignore all inappropriate words or phrases and return to the Manager Evaluation page.
Close	Click this button to return to the Manager Evaluation page.

Note: If you find more than one objectionable word or phrase in the document, each appears in succession. You can edit the sentence where the text is found.

Found in...

This group box displays the name of the section and the comment that contains the inappropriate word or phrase.

Apply	This button is enabled after you click Change. Click this button to apply any changes you may have made and continue checking.
Cancel	This button is enabled after you click Change. Click this button to cancel any changes you may have made and continue checking.

Related Links

<u>Understanding Advisor Tools</u>

Chapter 15

Managing Reviews and Approvals

Understanding Review and Approval Processes

This topic lists a prerequisite and discusses:

- Review and approval process options.

- Document statuses during review and approval.

- Review processes.

Prerequisite

You must enable the review and approval notifications on the ePerformance page for this process to work correctly.

Note: The Alternate Role User feature is not supported in ePerformance.

Review and Approval Process Options

This section discusses:

- Approval processing.

- Approval process participants.

Approval Processing

When you set up the document template, you select a review and approval process option and designate the roles that need to approve the document.

Review and approval processes are designed to:

- Notify employees and managers of status changes when employee review is required.

- Automatically route documents from one designated approver to another in the approval chain, and notify each approver by email when it is his or her turn to approve a document.

- Manage workflow; that is, the order in which the review and approval steps are performed.

ePerformance Streamlined Document Review and Approval Processes

The review and approval process options are:

- The Approval Before Employee Review (Apvl Before Review) Process - 5-Step and The Approval Before Employee Review (Apvl Before Review) Process - 3-Step

  In either process option, the document is approved before the manager discusses it with the employee.

- The Approval After Employee Review (Apvl After Review) Process - 4-Step and The Approval After Employee Review (Apvl After Review) Process - 3-Step

  In either process option, the approval step is initiated after the manager has reviewed the document with the employee and the employee or the manager acknowledges the document.

- The Approval, No Employee Review (Apvl No Review) Process

  The manager does not need to review the document with the employee, but approval is required.

- The No Approval, With Employee Review (No Apvl with Review) Process - 4-Step and The No Approval, With Employee Review (No Apvl with Review) Process - 2-Step

  In either process option, the manager must review the document with the employee, but the document does not need approval.

- The No Approval, No Employee Review (No Apvl No Review) Process

  The manager does not review the document with the employee, and the document does not need approval.

Based on the selected review and approval process, relevant steps action buttons become available in the employee and manager evaluations to guide them through the process and complete their evaluations.

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

Approval Process Participants

In the case where approval is required, the persons that must approve a document are determined by the approval rule set option that you select when creating the document template definition. You can have documents approved by:

- The manager's manager and the ePerformance human resources (HR) administrator.

- The ePerformance HR administrator only.

- The ePerformance manager only.

Related Links
Defining System Settings
Template Definition - Process Page

Document Statuses during Review and Approval

Employee reviews and management approvals are not required in all cases. If they are required, the manager's evaluation is the one that is reviewed and approved, and the status of this document reflects the review and approval status.

The manager's evaluation is the final document in the performance process and becomes the document used to communicate the employee's performance. In addition, the manager document is the one that other applications such as Salary Planning use for official purposes. Therefore, it is the document that goes through the review and approval process.

Document statuses provide a way of identifying the stages that an document moves through during the review and approval process cycle. Status codes also control when users can view or edit document data, what actions they can perform, and what page controls are available to them.

The statuses through which final documents must pass and the sequence of these statuses are determined by the review process option that is selected at the document template level.

The document statuses that are involved in evaluations are:

- *Evaluation in Progress*

   The document is changed to this status when it is ready for the employee, peers, and the manager to fill out their evaluations. When the document is in this status, the employee, manager, and peers can modify all sections of their respective evaluations that the template definition permits. The document stays in this status until the manager finishes editing the manager evaluation and clicks one of the primary action buttons on the page. The exact buttons that appear depend on setup and the associated review and approval process.

   If necessary, managers can reopen evaluations that were completed by the employee and peers. This reopen capability is available to managers as long as the document status is equal to *Evaluation in Progress*. To reopen a completed self or peer evaluation, the manager opens it and click the Reopen button in the evaluation. The system then changes the status of the evaluation from *Completed* to *Evaluation in Progress*.

- *Shared with Employee*

   The document status is changed to *Shared with Employee* when the manager clicks the Share with Employee button in the manager evaluation. This button is available when:

   - The selected review process is either *Approval After Review* (3-step or 4-step) or *No Approval with Review* (2-step or 4-step), and the current status of the evaluation is *Evaluation In Progress*.

   - The selected review process is *Approval Before Review* (3-step or 5-step) and the current status of the evaluation is *Approval - Approved.*

   While the evaluation is shared, the employee can view the manager evaluation and add comments to the Employee Comments section, if the section was included on the template. During this status, the manager can only edit the Manager Comments section, if the section was included on the template.

   While the consolidated document is available for review, the Request Acknowledgement button appears on the manager view of the document. The manager clicks this button when it is ready to send a request to the employee, asking that he or she acknowledges that both parties have met and discussed the evaluation.

   Note: The step to request acknowledgement from employees does not apply to these streamlined processes: Approval After Review (3-step), No Approval with Review (2-step) and Approval Before Review (3-step).

- *Pending Acknowledgement*

This document status indicates that the manager has discussed the consolidated document with the employee and has sent an acknowledgement request to the employee. During this status, the employee and the manager have read-only access to the document, except to enter or edit the Manager Comments or Employee Comments sections, if applicable. The Acknowledge button appears on the employee evaluation for the employee to provide acknowledgement when he or she is ready.

Note: This document status does not apply to these streamlined processes: Approval After Review (3-step), No Approval with Review (2-step) and Approval Before Review (3-step).

*   *Acknowledged*

    This status indicates that the employee has acknowledged the document, or the manager has overridden the employee acknowledgement.

    Note: The manager has the ability to override the employee acknowledgement in the event that the employee refuses to acknowledge the document or the employee isn't available to acknowledge the document.

    When this status is in effect, both the manager and employee have read-only access to the Manager Comments and Employee Comments sections of the document. An exception to this behavior is when the *Manager Comments* (or *Employee Comments*) special processing is enabled in the setup of a document section. In other words, the manager can still add comments in the comments section in which the *Manager Comments* special processing is selected. Similarly, the employee can edit the comments section if the *Employee Comments* special processing is enabled.

    When a document is in this status, only the HR administrator has the privilege to change the status back to *Evaluation in Progress*.

*   *Approval - Submitted*

    This status indicates that the manager has submitted the evaluation for approval by clicking the Submit for Approval button. This button appears when:

    *   The selected review process is either *Approval Before Review* (3-step or 5-step) or *Approval, No Employee Review*, and the current status of the evaluation is *Evaluation In Progress*.

    *   The selected review process is *Approval After Employee Review* (3-step or 4-step) and the current status of the evaluation is *Acknowledged*.

*   *Approval - Approved*

    This status indicates that the evaluation has been approved by approvers. The manager can then click the Complete button to finish the evaluation process.

*   *Completed*

    This status indicates that the evaluation process is finished. No further changes to the document are permitted. With this status, employees and managers have read-only access to the document as historical or view-only document and are unable to edit or modify the content.

    Only administrators have the ability to reopen completed manager evaluations if necessary.

*   *Canceled*

This status indicates that the document and all its associated evaluations is canceled. Managers can cancel documents in two places: from the manager evaluation or from the manager's Cancel Document page (applicable only to documents that are in one of these statuses: *Define Criteria*, *Track Progress*, and *Evaluation in Progress*. HR administrators can cancel documents at any time using their own Cancel Document page.

Note: The *Shared with Employee, Pending Acknowledgement,*, and *Acknowledged* statuses do not apply when the review process option is set to *No Approval, No Employee Review* or *Approval, No Employee Review.* In these cases, employees can only view the manager's document when the status is *Completed.*

Delivered Review and Approval Processes

This section discusses:

• Process Overview.

• Manager and Employee Signatures for the eSignature Section.

• Audit History for Manager Evaluation

• The Approval Before Employee Review (Apvl Before Review) Process - 5-Step.

• The Approval Before Employee Review (Apvl Before Review) Process - 3-Step.

• The Approval After Employee Review (Apvl After Review) Process - 4-Step.

• The Approval After Employee Review (Apvl After Review) Process - 3-Step.

• The Approval, No Employee Review (Apvl No Review) Process.

• The No Approval, With Employee Review (No Apvl with Review) Process - 4-Step.

• The No Approval, With Employee Review (No Apvl with Review) Process - 2-Step.

• The No Approval, No Employee Review (No Apvl No Review) Process.

Process Overview

Review process options, document statuses, and approval status values control:

• The page elements that are available.

• The different levels of access that managers, employees, and HR administrators have to the document.

• The actions that managers, employees, and HR administrators can perform at different points in the review and approval cycle.

Note: Other evaluation participants are not affected by review and approval processes.

Tables in this section illustrate the high-level process flow for each supported review process option and how the status changes based on user actions on the manager and employee evaluations. The buttons that are listed in these tables are hidden until they are valid for use.

Manager and Employee Signatures for the eSignature Section

If a document that a manager and an employee work on has the eSignature section enabled on its associated template, the system records and displays the date, time, and electronic signature of these individuals in the eSignature section on the printed version of the document.

Note: The eSignature section is only supported in review processes that include the employee reviews, which are the *Approval Before Employee Review 5-Step, Approval Before Employee Review 3-Step, Approval After Employee Review 4-Step, Approval After Employee Review 3-Step, No Approval, With Employee Review 4-Step* , and *No Approval, With Employee Review 2-Step* processes.

The system records eSignatures in a document under these conditions:

*   The employee's electronic signature is captured when the employee acknowledges the document, as shown in the Acknowledged By audit entry. If the manager performs an acknowledgement override, the manager's electronic signature is displayed on behalf of the employee's.

*   The time when the manager's electronic signature is captured varies based on the selected review process. The system records the signature:

    *   When the manager shares the document with the employee, if the review process is <u>The Approval Before Employee Review (Apvl Before Review) Process - 3-Step</u>, <u>The Approval After Employee Review (Apvl After Review) Process - 3-Step</u>, or <u>The No Approval, With Employee Review (No Apvl with Review) Process - 2-Step</u> process.

    *   When the manager submits the document for approval, if the review process is <u>The Approval After Employee Review (Apvl After Review) Process - 4-Step</u> process.

    *   When the manager manually completes the document, if the review process is either <u>The Approval Before Employee Review (Apvl Before Review) Process - 5-Step</u> or <u>The No Approval, With Employee Review (No Apvl with Review) Process - 4-Step</u> process.

No electronic signature is displayed, if the associated audit entry is not available.

If the eSignature section is not enabled at the template level, as an alternative, the manager needs to print out the document for both parties to sign manually.

Audit History for Manager Evaluation

The audit history of a manager evaluation captures when an action related to the review process occurred and the person who performed the action. Depending on the review process being used, some or all of these entries can be found in the Audit History section of a document:

*   Created By — records the name of the person who created the document, and the date and time of the action. This entry is available in all the steps included the performance process, not just the manager evaluation.

*   Last Modified By — records the name of the person who updated and saved the document most recently, and the date and time of the action. This entry is available in all the steps included the performance process, not just the manager evaluation.

*   Manager Signed By — records the name of the manager who shared the document with the employee, submitted the document for approval or completed the document (based on the selected review

process), and the date and time of the action. This entry is available if the eSignature section is enabled on the template of the document.

- Acknowledged By — records the name of the employee who acknowledged the document, and the date and time of the action. In the case where the manager overrode the acknowledgement, the manager's name is displayed instead.

- Completed By — records the name of the manager who completed the document, and the date and time of the action. If the document was completed automatically by the system, the word *System* is displayed instead.

Email Notifications

ePerformance can be set up to send out email notifications during the evaluation time when:

- The employee completes the self evaluation, or the manager completes the manager evaluation.

- The manager shares the document with the employee

- The manager requests acknowledgement from the employee.

- The employee acknowledges the document.

The email recipient can access the document from the link in the email notification. If the employee added any additional comments in the Employee Comments sections of the document, those comments are displayed as email content.

The Approval Before Employee Review (Apvl Before Review) Process - 5-Step

Image: Approval Before Employee Review Process - 5-Step

This diagram illustrates the 5-step Approval Before Employee Review process flow:

This table describes the flow of the process, lists the availability of action buttons that appear in the manager and employee evaluations for the process, and the change of statuses during the process:

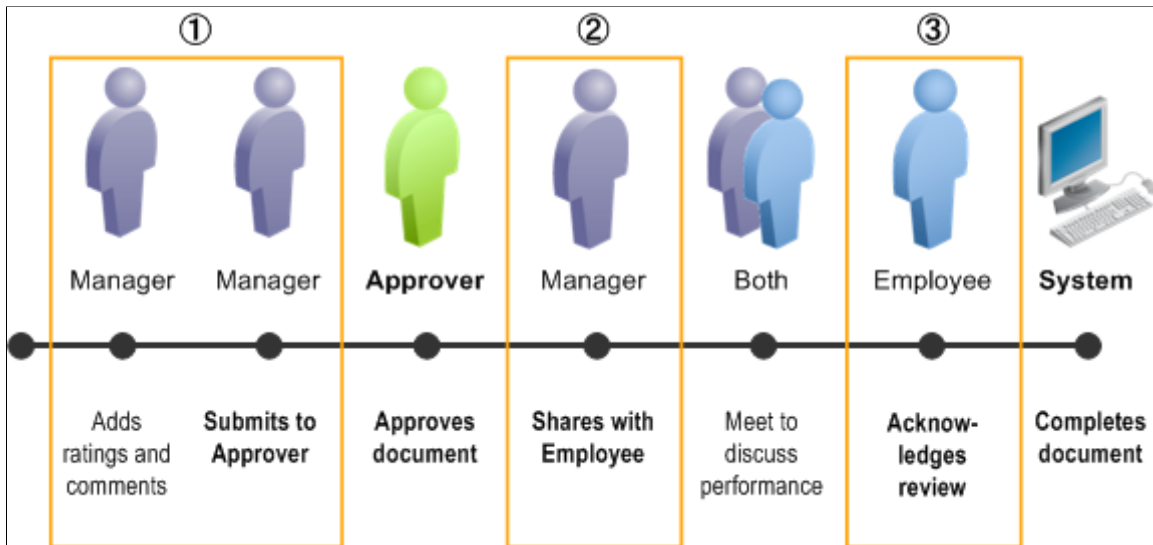| *Action*	*Available Action Button*	*Document Status*
1. Manager adds ratings and comments to the document. When finished, manager clicks the Submit for Approval button to submit the document for approval. Manager confirms the action.	Submit for Approval	(original) Evaluation in Progress (changed to) Approval - Submitted
2. Individual in the approval chain approves the document. System changes document status accordingly. **Note:** If the email approval transaction for performance documents is enabled, the system sends approvers email messages from which they can approve or deny the document.	-	(changed to) Approval - Approved
3. Manager opens the approved document and clicks the Share with Employee button to share the document with the employee. Manager confirms the action.	Share with Employee	(changed to) Shared with Employee
4. Manager and employee meet to discuss the document. Next, manager clicks the Request Acknowledgement button to ask the employee to acknowledge that they have discussed the evaluation. Manager confirms the action.	Request Acknowledgement	(changed to) Pending Acknowledgement
5. Then, one of these two things happens: • (If the Employee Comments section is enabled on the document template) Employee adds any final comments, and clicks the Acknowledge button to acknowledge the document. • Manager clicks the Override Acknowledgement button to override the acknowledgement (for example, when employee is unavailable to provide acknowledgment). Employee (or manager) confirms the action. System, if applicable, records the individual's eSignature. See Also Manager and Employee Signatures for the eSignature Section	(for employee) Acknowledge (for manager) Override Acknowledgement	(changed to) Acknowledged
Manager clicks the Complete button to finish the review. Manager confirms the action. System changes the document status to *Completed.* It also, if applicable, records the manager's eSignature. See Also Manager and Employee Signatures for the eSignature Section	Complete	(changed to) Completed

Note: If approval is denied, the document status changes to *Evaluation In Progress* in the manager evaluation. The system displays a message on the evaluation, stating that approval has been denied for the document. The manager needs to update the document as necessary, and submit it for approval again.

The Approval Before Employee Review (Apvl Before Review) Process - 3-Step

Image: Approval Before Employee Review Process - 3-Step

This diagram illustrates the 3-step Approval Before Employee Review process flow:

This table describes the flow of the process, lists the availability of action buttons that appear in the manager and employee evaluations for the process, and the change of statuses during the process:

Action	Available Action Button	Document Status
1. Manager adds ratings and comments to the document. When finished, manager clicks the Submit for Approval button to submit the document for approval. Manager confirms the action.	Submit for Approval	(original) Evaluation in Progress (changed to) Approval - Submitted
Individual in the approval chain approves the document. System changes document status accordingly.	-	(changed to) Approval - Approved
2. Manager opens the approved document and clicks the Share with Employee button to share the document with the employee. Manager confirms the action. System, if applicable, records the manager's eSignature. See Also Manager and Employee Signatures for the eSignature Section	Share with Employee	(changed to) Shared with Employee

Action	Available Action Button	Document Status
3. Manager and employee meet to discuss the document. Then, one of these two things happens: • (If the Employee Comments section is enabled on the document template) Employee adds any final comments, and clicks the Acknowledge button to acknowledge the document. • Manager clicks the Override Acknowledgement button to override the acknowledgement (for example, when employee is unavailable to provide acknowledgment). Employee (or manager) confirms the action. System, if applicable, records the individual's eSignature. See Also Manager and Employee Signatures for the eSignature Section	(for employee) Acknowledge (for manager) Override Acknowledgement	(changed to) Acknowledged
System sets the document status to *Completed*.	-	(changed to) Completed

The Approval After Employee Review (Apvl After Review) Process - 4-Step

Image: Approval After Employee Review Process - 4-Step

This diagram illustrates the 4-step Approval After Employee Review process flow:

This table describes the flow of the process, lists the availability of action buttons that appear in the manager and employee evaluations for the process, and the change of statuses during the process:
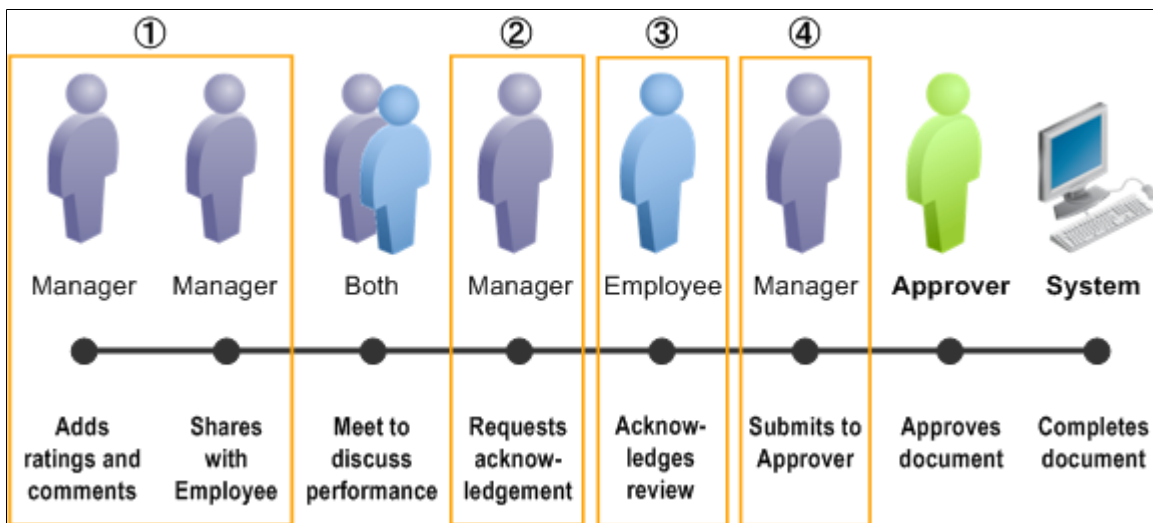
Action	*Available Action Button*	*Document Status*
1. Manager adds ratings and comments to the document. When finished, manager clicks the Share with Employee button to share it with the employee. Manager confirms the action.	Share with Employee	(original) Evaluation in Progress (changed to) Shared with Employee
2. Manager and employee meet to discuss the document. Next, manager clicks the Request Acknowledgement button to ask the employee to acknowledge that they have discussed the evaluation. Manager confirms the action.	Request Acknowledgement	(changed to) Pending Acknowledgement
3. Then, one of these two things happens: • (If the Employee Comments section is enabled on the document template) Employee adds any final comments, and clicks the Acknowledge button to acknowledge the document. • Manager clicks the Override Acknowledgement button to override the acknowledgement (for example, when employee is unavailable to provide acknowledgment). Employee (or manager) confirms the action. System changes the status to *Acknowledged.* It also, if applicable, records the individual's eSignature. See Also <u>Manager and Employee Signatures for the eSignature Section</u>	(for employee) Acknowledge (for manager) Override Acknowledgement	(changed to) Acknowledged
4. Manager opens the document and clicks the Submit for Approval button. Manager confirms the action. System, if applicable, records the manager's eSignature. See Also <u>Manager and Employee Signatures for the eSignature Section</u>	Submit for Approval	(changed to) Approval - Submitted
Individual in the approval chain approves the document. When the approval is completed, the system changes the document status to *Completed.*	-	(changed to) Completed

Note: If approval is denied, the document status changes to *Evaluation in Progress* in the manager evaluation. The system displays a message on the evaluation, stating that approval has been denied for the document. The manager needs to update the document as necessary, and submit it for approval again.

The Approval After Employee Review (Apvl After Review) Process - 3-Step

Image: Approval After Employee Review Process - 3-Step

This diagram illustrates the 3-step Approval After Employee Review process flow:

This table describes the flow of the process, lists the availability of action buttons that appear in the manager and employee evaluations for the process, and the change of statuses during the process.
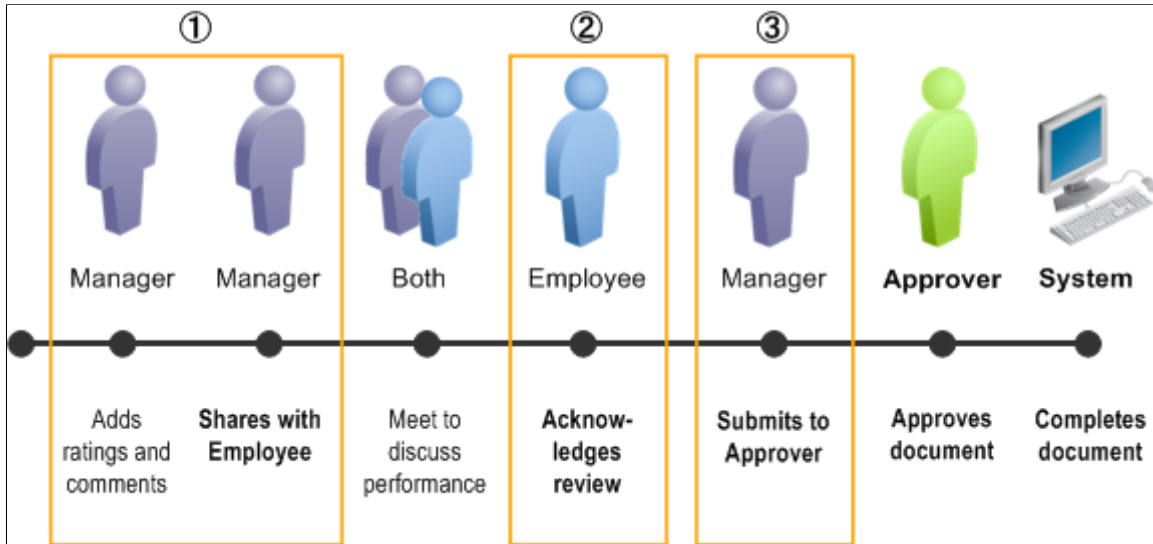
Action	Available Action Button	Document Status
1. Manager adds ratings and comments to the document. When finished, manager clicks the Share with Employee button to share it with the employee. Manager confirms the action. System, if applicable, records the manager's eSignature. See Also Manager and Employee Signatures for the eSignature Section	Share with Employee	(original) Evaluation in Progress (changed to) Pending Acknowledgement

Action	Available Action Button	Document Status
2. Manager and employee meet to discuss the document. Then, one of these two things happens: • (If the Employee Comments section is enabled on the document template) Employee adds any final comments, and clicks the Acknowledge button to acknowledge the document. • Manager clicks the Override Acknowledgement button to override the acknowledgement (for example, when employee is unavailable to provide acknowledgment). Employee (or manager) confirms the action. System, if applicable, records the individual's eSignature. See Also Manager and Employee Signatures for the eSignature Section	(for employee) Acknowledge (for manager) Override Acknowledgement	(changed to) Acknowledged
3. Manager opens the document and clicks the Submit for Approval button. Manager confirms the action.	Submit for Approval	(changed to) Approval - Submitted
Individual in the approval chain approves the document. When the approval is completed, the system changes the document status to *Completed*.	-	(changed to) Completed

The Approval, No Employee Review (Apvl No Review) Process

Image: The Approval, No Employee Review Process

This diagram illustrates the Approval, No Employee Review process flow:

This table describes the flow of the process, lists the availability of action buttons that appear in the manager and employee evaluations for the process, and the change of statuses during the process.

Action	Available Action Button	Document Status
1. Manager adds ratings and comments to the document. When finished, manager clicks the Submit for Approval button to initiate the approval process. Manager confirms the action.	Submit for Approval	(original) Evaluation in Progress (changed to) Approval - Submitted
2. Individual in the approval chain approves the document. When the approval is finished, the system changes the document to *Approval - Approved.*	-	(changed to) Approval - Approved
3. Manager clicks the Complete button to finish the review manually. Manager confirms the action. System sets the document status to *Completed.*	Complete	(changed to) Completed

Note: If approval is denied, the document status changes to *Evaluation in Progress* in the manager evaluation. The system displays a message on the evaluation, stating that approval has been denied for the document. The manager needs to update the document as necessary, and submit it for approval again.

The No Approval, With Employee Review (No Apvl with Review) Process - 4-Step

Image: No Approval, With Employee Review Process - 4-Step

This diagram illustrates the 4-step No Approval, With Employee Review process flow:

This table describes the flow of the process, lists the availability of action buttons that appear in the manager and employee evaluations for the process, and the change of statuses during the process.
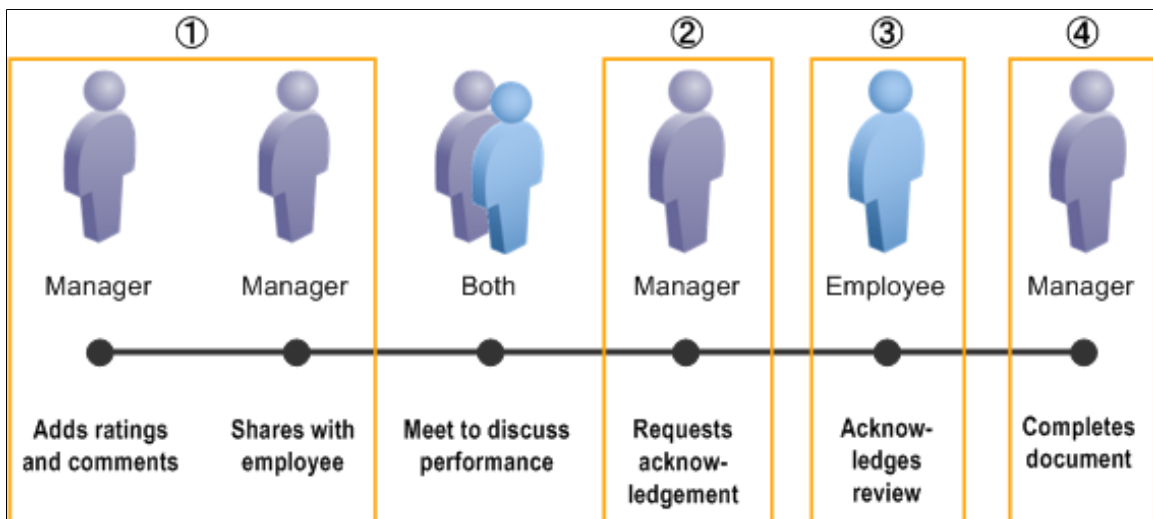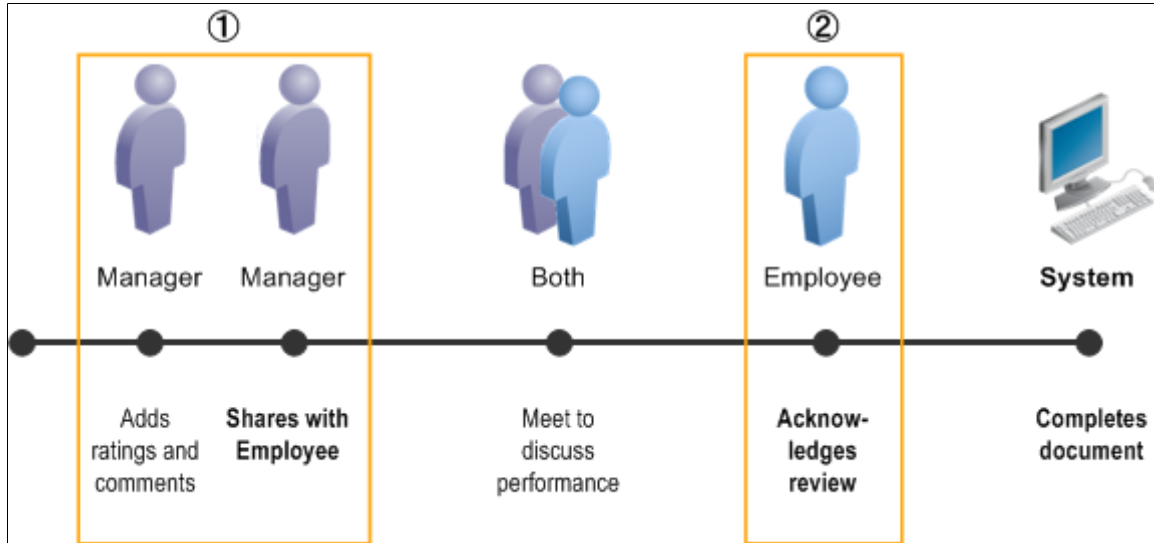
Action	*Available Action Button*	*Document Status*
1. Manager adds ratings and comments to the document. When finished, manager clicks the Share with Employee button to share it with the employee. Manager confirms the action.	Share with Employee	(original) Evaluation in Progress (changed to) Shared with Employee
2. Manager and employee meet to discuss the document. Next, manager clicks the Request Acknowledgement button to ask the employee to acknowledge that they have discussed the evaluation. Manager confirms the action.	Request Acknowledgement	(changed to) Pending Acknowledgement
3. Then, one of these two things happens: • (If the Employee Comments section is enabled on the document template) Employee adds any final comments, and clicks the Acknowledge button to acknowledge the document. • Manager clicks the Override Acknowledgement button to override the acknowledgement (for example, when employee is unavailable to provide acknowledgment). Employee (or manager) confirms the action. System, if applicable, records the individual's eSignature. See Also Manager and Employee Signatures for the eSignature Section	(for employee) Acknowledge (for manager) Override Acknowledgement	(changed to) Acknowledged
4. Manager clicks the Complete button to finish the review. Manager confirms the action. System sets the document status to *Completed*. It also, if applicable, records the manager's eSignature. See Also Manager and Employee Signatures for the eSignature Section	Complete	(changed to) Completed

The No Approval, With Employee Review (No Apvl with Review) Process - 2-Step

Image: No Approval, With Employee Review Process - 2-Step

This diagram illustrates the 2-step No Approval, With Employee Review process flow:

This table describes the flow of the process, lists the availability of action buttons that appear in the manager and employee evaluations for the process, and the change of statuses during the process.

Action	*Available Action Button*	*Document Status*
1. Manager adds ratings and comments to the document. When finished, manager clicks the Share with Employee button to share it with the employee. Manager confirms the action. System, if applicable, records the manager's eSignature. See Also Manager and Employee Signatures for the eSignature Section	Share with Employee	(original) Evaluation in Progress (changed to) Pending Acknowledgement

Action	Available Action Button	Document Status
2. Manager and employee meet to discuss the document. Then, one of these two things happens: • (If the Employee Comments section is enabled on the document template) Employee adds any final comments, and clicks the Acknowledge button to acknowledge the document. • Manager clicks the Override Acknowledgement button to override the acknowledgement (for example, when employee is unavailable to provide acknowledgment). Employee (or manager) confirms the action. System, if applicable, records the individual's eSignature. See Also <u>Manager and Employee Signatures for the eSignature Section</u>	(for employee) Acknowledge (for manager) Override Acknowledgement	(changed to) Acknowledged
System sets the document status to *Completed*.	-	(changed to) Completed

The No Approval, No Employee Review (No Apvl No Review) Process

Image: No Approval, No Employee Review Process

This diagram illustrates the No Approval, No Employee Review process flow:

This table describes the flow of the process, lists the availability of action buttons that appear in the manager and employee evaluations for the process, and the change of statuses during the process.
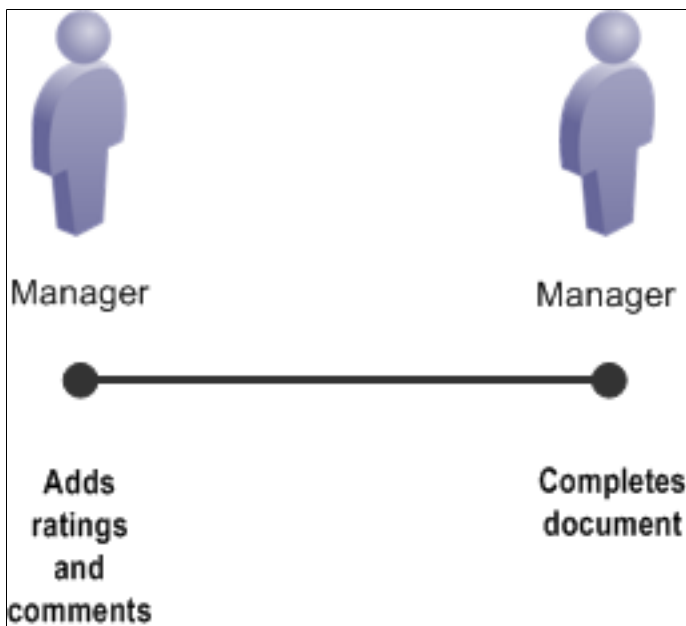
Action	Available Action Button	Document Status
1. Manager adds ratings and comments to the document. When finished, manager clicks the Complete button to finish the review. Manager confirms the action.	Complete	(original) Evaluation in Progress (changed to) Completed
System sets the document status to *Completed.*	-	-

Conducting Reviews

This topic lists the page used to conduct reviews.

Page Used to Conduct Reviews

Page Name	Definition Name	Usage
<Manager or Self-> Evaluation Page	EP_APPR_MAIN1	Complete the manager evaluation based on the review process specified at the document template level.

Related Links

Understanding Evaluation Data Entry
Understanding Feedback Consolidation

Approving Documents

This section discusses how to:

• Select documents to approve.

• Approve documents.

• Resolve approval transactions in error.

• Delegate approvals.

Pages Used to Approve Documents

Page Name	Definition Name	Usage
Select Transaction to Approve Page	EP_APPRAISL_APPR_L	Select the employees for whom you want to grant or deny approval of a document.
View Approval Status Summary Page	EP_APPRAISL_APPR_L	View a list of employees and their approval status.

Page Name	Definition Name	Usage
Approve Document Page	EP_APPRAISAL_EE	Approve or deny approval of a document.

Related Links

Viewing Approval Status

Select Transaction to Approve Page

Use the Select Transaction to Approve page (EP_APPRAISL_APPR_L) to select the employees for whom you want to grant or deny approval of a document.

Navigation

- Manager Self Service >Performance Management >Approve Documents >Select Transaction to Approve

- Workforce Development >Performance Management >Approve Documents >Select Transaction to Approve

Image: Select Transaction to Approve page

This example illustrates the fields and controls on the Select Transaction to Approve page.

This page enables you to view the documents that you need to approve. It is identical to the View Approval Status Summary page except the Select Transaction to Approve page lists only documents that you have not yet approved, while the View Approval Status Summary page lists all documents where you are an approver or an originator.

Approve Document Page

Use the Approve Document page (EP_APPRAISAL_EE) to approve or deny approval of a document.

Navigation

Click an employee name link to open a document on the Select Transaction to Approve page.

Image: Approve Document page (1 of 2)

This example illustrates the fields and controls on the Approve Document page (1 of 2).

Image: Approve Document page (2 of 2)

This example illustrates the fields and controls on the Approve Document page (2 of 2).

Users can also approve or deny documents directly from email notifications that they receive for the approval requests.

See Also Approving Documents From Email

Performance Document Details	Click this link to display the Manager Evaluation page in a modal window in display-only mode. This page contains the consolidated evaluations and comments from all participants.
Process Detail	Displays detailed information about the approval process.
Evaluation Approval Chain	Displays the approvers in the approval process and their status. Click the name link to open a new browser window containing detailed information about the approver.
Comment	Enter the reason for approving the document, or denying approval.
Approve	Click this button to approve the transaction.
Deny	Click this button to deny the transaction.
Approval Summary	Click to return to the Select Transaction to Approve page.

Resolving Approval Transactions in Error

If an error occurs and the system is not able to route the transaction to its intended approver, the system automatically routes the transaction to the administrator, as defined on the approval process definition. The administrator can then review the transaction using the Monitor Approvals (PTAF_ADMIN_MON) component to approve, deny, or reassign the transaction to the appropriate approver

See "Administering Approvals" (PeopleSoft HCM 9.2: Application Fundamentals).

Delegating Approvals

Administrators and managers can delegate someone in the system to approve ePerformance documents in their absence.

See Working with Delegations.

Related Links
Using Fluid Approvals to Approve Documents

Using Fluid Approvals to Approve Documents

This topic describes how to approve documents using Fluid Approvals.

See Also "Using PeopleSoft Fluid User Interface Self-Service Approval Transactions" (PeopleSoft HCM 9.2: Application Fundamentals)

Page Used to Approve Documents Using Fluid Approvals

Page Name	Definition Name	Usage
Pending Approvals - Performance Page	EOAWMA_TXNHDTL_FL	Approve a document.
Evaluation - Pending Approval Page	EP_APPR_MAIN1	Review document details before taking any approval action.

## Pending Approvals - Performance Page

Use the Pending Approvals - Performance page (EOAWMA_TXNHDTL_FL) to approve a document.

Navigation

On the Manager Self Service home page, click the Approvals tile to access the Pending Approvals page. Then click a performance document entry on the Pending Approvals page.

Image: Pending Approvals - Performance Page

This example illustrates the fields and controls on the Pending Approvals - Performance page.

HCM Fluid Approvals - Image Highlights

PeopleSoft HCM Fluid Approvals
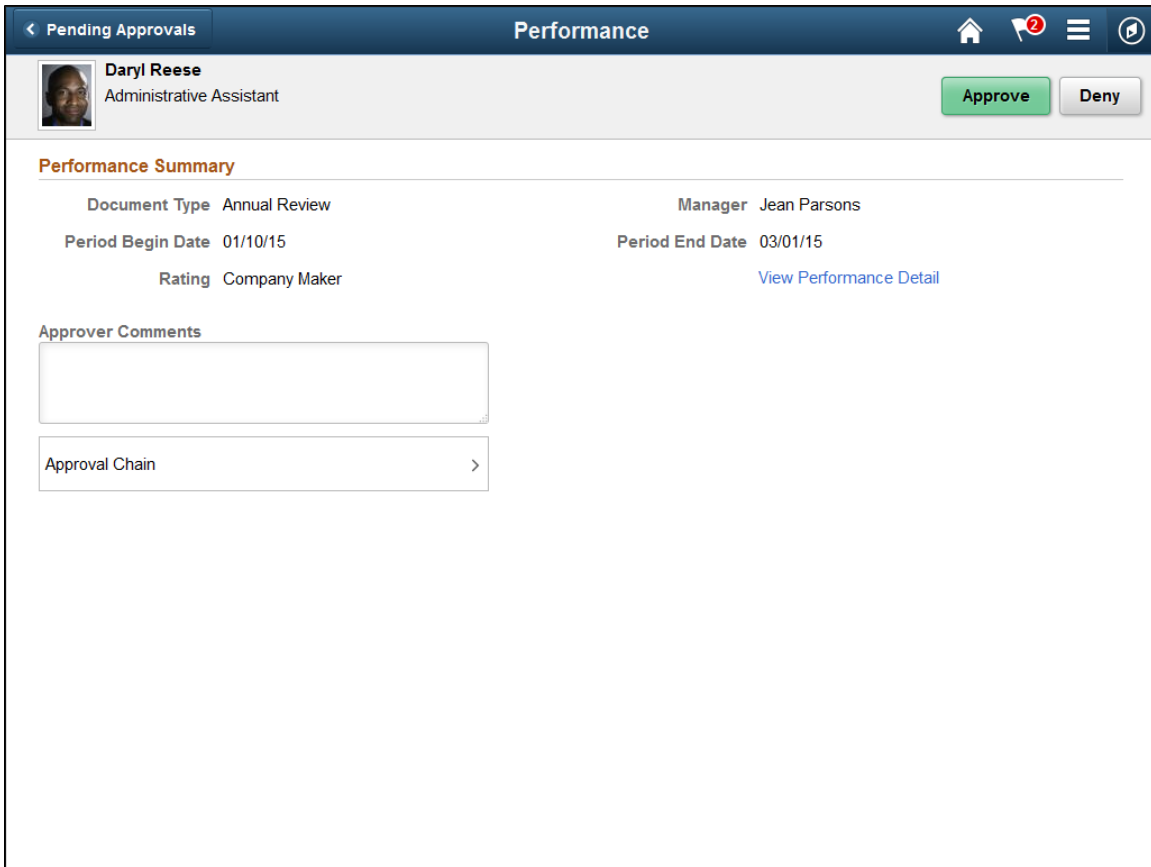
Approval Options

The approval options on this page are common to all fluid approval transactions, as described in the documentation for the "Pending Approvals - <Transaction Details> Page" (PeopleSoft HCM 9.2: Application Fundamentals).

Approve and **Deny**	Use these buttons to take action on the requested approval.
Approver Comments	Enter any comments related to the approval action you take.
Approval Chain	Click this item to open the Approval Chain page, where you can review information about all approvers for the transaction.

Performance Summary

This section displays the summary information of the document pending approval.

View Performance Detail	Click to access to the <u>Evaluation - Pending Approval Page</u> to review document details before taking any approval action.

Related Links

<u>Approving Documents</u>

Evaluation - Pending Approval Page

Use the Evaluation – Pending Approval page (EP_APPR_MAIN1) to review document details.

Navigation

Click the View Performance Detail link on the Pending Approvals - Performance page.

Image: Evaluation - Pending Approval page

This example illustrates the fields and controls on the Evaluation - Pending Approval page.
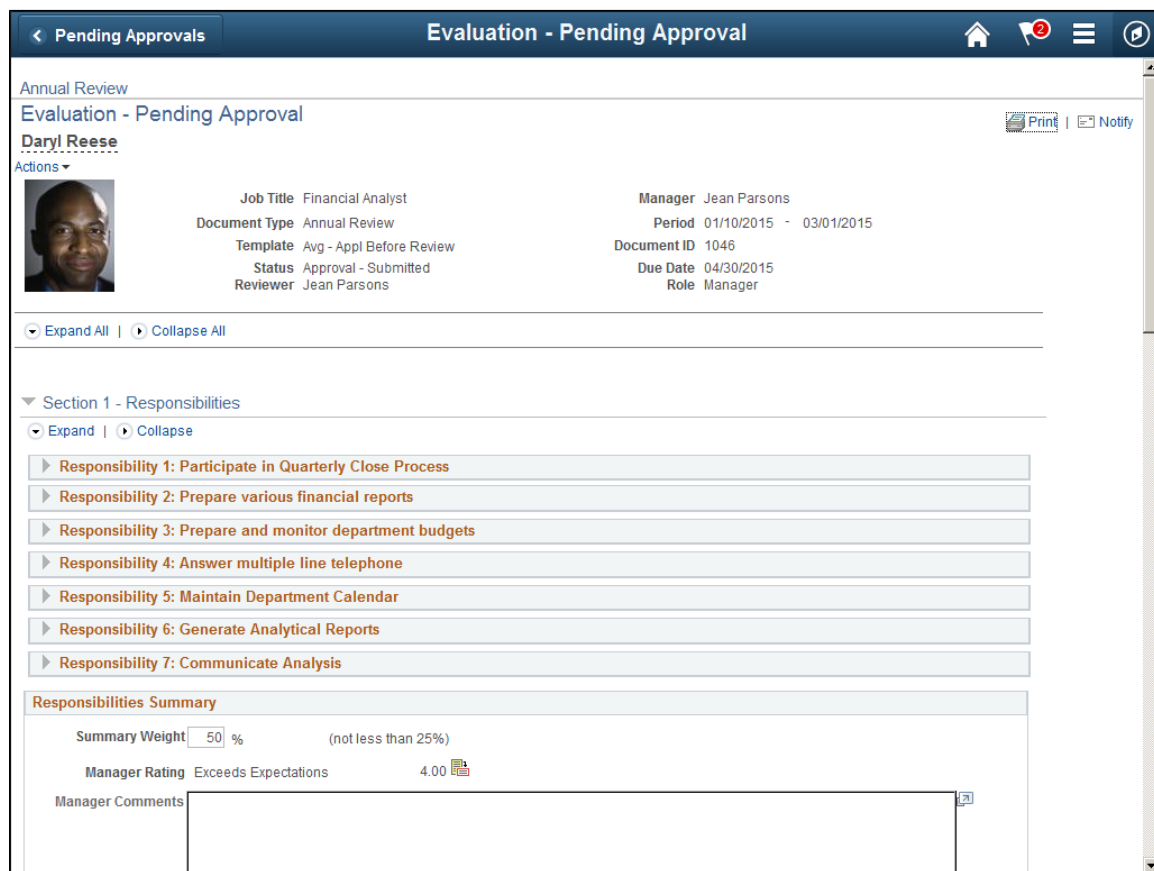
Use this page to review the document before taking any approval action, if needed.

Updating Person Profiles

This topic provides an overview on the update person profile process.

Understanding the Update Person Profile Process

When the document is complete, the employee's person profile can be updated with the information from the performance or development document. To update the employee's person profile:

1. The system checks that the Update Person Profile check box is selected on the <u>Template Definition - Structure Page</u> - Profile Management tab for the role.

2. If the Update Person Profile check box is selected, then the system identifies the profiles types that need to be updated for the employee. If a profile does not exist, the system create one for the employee.

3. The system copies all items for each section into the employee's profile.

Chapter 16

Performing Administrative Tasks

Working With Automatic Document Transfer

This topic provides overviews of the Automatic Document Transfer feature and its setup, and discusses how to view automatic transfer statuses of documents that were previously owned by terminated managers.

Pages Used to Work With Automatic Document Transfer

Page Name	Definition Name	Usage
ePerformance Page	EP_INSTALLATION	Enable the automatic document transfer functionality.
Auto Transfer Document Status Page	EP_XFER_LOG_FL	View automatic transfer statuses of in-progress documents that were owned by terminated managers.

Understanding Automatic Document Transfer

When managers are terminated from their jobs and they own documents that are still in progress, these documents need to be handed over to other managers for the employee reviews to continue. The Automatic Document Transfer feature automatically transfers in-progress documents from terminated managers to their next-level-up managers, and notifies new managers after the transfer is completed.

Documents are considered *in-progress* when they are not completed or canceled.

Upon the termination of managers in which the HR status of their jobs is changed to *Inactive* in job data, the feature finds all in-progress documents for which they are the manager. Using the Direct Reports functionality, it identifies the active next-level-up manager for the terminated managers based on the selected access type, and transfers the in-progress documents to the new managers. After the transfer is completed, new managers receive system-generated email notifications about the documents that are transferred to them.

Note: If the effective date of a manager's termination is the current or a past date, the transfer of the manager's documents happens immediately. If the termination is future-dated, the automatic document transfer application engine process (EP_AUTO_XFER) will be submitted to the Process Scheduler to run on the termination effective date.

Automatic document transfer may not happen for a number of reasons, for example, the next-level-up manager cannot be found, or the terminated manager has other active jobs in the system. Administrators can review overall document transfer statuses and information on the Auto Transfer Document Status Page. For documents that were not automatically transferred successfully, administrators can transfer

these documents manually using the Transfer Document pages, which are available in the same Performance Administration navigation collection.

Related Links

Performance Administration Tile

Setting Up Automatic Document Transfer

To set up automatic document transfer:

- Select the Enable Automatic Transfers option and applicable access type on the ePerformance Page.

- Make sure that the Integration Broker is configured, and the *AssignmentTerminated* event is active in the Event Framework.

- Select the Automatic Job Termination option on the "Product Specific Page" (PeopleSoft HCM 9.2: Application Fundamentals).

Auto Transfer Document Status Page

Use the Auto Transfer Document Status page (EP_XFER_LOG_FL) to view automatic transfer statuses of in-progress documents that were owned by terminated managers.

Navigation

Click the title of the default home page and select *Talent Administrator* from the list that appears.

Click the Performance Administration tile to open the Performance Administration application start page, and click Auto Transfer Document Status from the navigation collection.

Image: Auto Transfer Document Status Page

This example illustrates the fields and controls on the Auto Transfer Document Status page.

As an administrator, you can use the Search for Documents section to refine the search result by entering one or more of these search values: the employee's first and last names, terminated manager's first and last names, document type, and time period during which the document transfer took place.

Status	Displays the transfer status of the document. Values are:
	Complete: The document was transferred to the new manager successfully. This status is applicable to all access types.
	Manager still has active Job: Document was not transferred because the terminated manager has multiple jobs. He or she was terminated from one job, and still has other active jobs in the system. This status is applicable to all access types.
	No Manager found: Document was not transferred because no manager for the terminated manager was found. This status is applicable to *By Department Manager ID* and *By Part Posn Mgmt Dept Mgr ID* access types.
	No Reports To found: Document was not transferred because the Report To person for the terminated manager was missing. This status is applicable to *By Part Posn Mgmt Dept Mgr ID, By Part Posn Mgmt Supervisor,* and *By Reports To Position* access types.
	No Supervisor found: Document was not transferred because no supervisor for the terminated manager was found. This status is applicable to *By Supervisor ID* and *By Part Posn Mgmt Supervisor* access types.
	For documents that were not transferred automatically, they can be transferred manually on the <u>Transfer Document Page</u>.

Managing Administrative Tasks

This topic provides an overview of administrative tasks and discusses how to manage various administrative tasks in ePerformance.

Pages Used to Manage Administrative Tasks

Page Name	*Definition Name*	*Usage*
<u>Transfer Document Page</u>	EP_APPR_SELECT	Select documents for transfer from one manager to another.
<u>Confirm Transfer Page</u>	EP_APPR_XFER	Confirm the transfer of documents between managers.
<u>Reopen Document Page</u>	EP_APPR_SELECT	Change the status of documents that are currently in the evaluation phase back to *Evaluation in Progress*.

Page Name	Definition Name	Usage
Confirm Reopen Document Page	EP_APPR_STATUS	Confirm the status change to be made on the selected documents.
Cancel Document Page	EP_APPR_SELECT	Cancel documents.
Confirm Cancellation Page	EP_APPR_CANCEL	Confirm document cancellation.
Delete Documents Page	EP_APPR_SELECT	Delete documents that you previously canceled.
Confirm Delete Page	EP_APPR_DELETE	Confirm a document deletion.

Understanding Administrative Tasks

This section discusses these topics:

- Transfer

- Status change

- Cancel

- Delete

- Preliminary ratings

Note: You can perform certain administrative tasks outside of the evaluation cycle. Typically, administrators perform these tasks for documents that belong to one or more groups of employees that do not report to them, while managers work only with documents for employees or groups that report directly to them.

Transfer

You might transfer a document from one manager to another if an employee is reassigned or if a reorganization occurs. Administrators can transfer any document that is in any status except for *Canceled.* Managers can transfer only documents that they currently own with any status other than *Completed* and *Canceled.*

When a document is transferred, the system automatically notifies the new manager that he or she is responsible for completing the evaluation process that is in progress for that employee.

Status Change

The status of individual evaluations (which are part of a document) changes when tasks are performed. These tasks include opening or completing employee and manager evaluations, and clicking of action buttons to share evaluation with employee, send acknowledgement requests, and acknowledge evaluations. Additionally, managers can also change the status of completed employee or peer evaluations by clicking the Reopen button or link on the document. This changes the individual evaluation status from *Completed* back to *Evaluation in Progress*. The Reopen button is available to the manager and to the ePerformance Administrator for evaluations that they are not the owner (the manager can't reopen their own evaluation) of, if the evaluation status is *Completed* or *Canceled* and the overall document status is

Evaluation in Progress. Once the manager moves their document status past *Evaluation in Progress,* they cannot reopen the employee evaluation.

However, additional situations might occur where managers or ePerformance administrators need to change the statuses of documents as a whole. Document statuses are changed using pages that are found on the Administrative Tasks menu. Document statuses can only be changed to *In Progress.*

Managers can change documents to *Evaluation in Progress* from any of these statuses:

•   *Shared with Employee*

•   *Pending Acknowledgement*

•   *Acknowledged*

•   *Approval (with approval status = Submitted or Approved)*

ePerformance administrators can change document statuses to *Evaluation in Progress* from all statuses mentioned above, plus *Canceled* and *Completed.*

If a document is changed from *Completed* or *Canceled* to the *Evaluation in Progress* status, the document is removed from all approval queues and becomes inaccessible to the employee. If the status is changed from *Completed* to *Evaluation in Progress,* the following steps on the document also change to *Evaluation in Progress:* Nominate Participants; Track Nominations; and Review Participant Evaluations.

Any competency ratings that were pushed from the completed evaluation to Job Profile Manager (JPM) are rolled back. Managers must then move the document back through the entire sequence of statuses until they can once again mark it as complete.

Cancel

ePerformance enables managers and ePerformance administrators to cancel a document. Managers can cancel documents that are in the Define Criteria, Track Progress, or Evaluation in Progress document status. ePerformance administrators can cancel any document that is not already canceled.

After you cancel a document, it becomes inactive. Canceling a document does not remove it from the system – it only marks it as canceled and the document appears in the Historical Documents page instead of the Current Documents page.

When the system updates Manage Profiles, the system deletes all documents that have been canceled and updates the Manage Profiles business process.

Delete

Because canceled documents are not physically deleted from the system, ePerformance provides a delete function that enables you to remove documents and all their associated evaluations completely from the system. ePerformance administrators can delete any canceled documents where managers can delete documents that they canceled.

Preliminary Ratings

Managers can enter preliminary ratings for employees and update these ratings at any time that a document's status is *Evaluation in Progress, Define Criteria,* and *Track Progress.* Preliminary ratings use the rating model that is defined for the Overall Summary section and are used to generate the View

Ratings Summary (EP_DISTRIB_SUM) report, which you use to analyze whether ratings are distributed in the expected manner. Employees cannot view preliminary ratings.

See Understanding Evaluation Data Entry.

Automatic Cancellation of Working Documents for Terminated Employees

When employees get terminated from their jobs in the HR system, administrators or managers are responsible for canceling all of the employees' ePerformance documents that are currently in progress as these documents are no longer needed. To save users time from canceling these documents manually or entering comments for these unwanted documents, ePerformance provides a process that, when enabled, cancels all in progress documents of employees who have been terminated in the HR system.

ePerformance leverages the *AssignmentTerminated* event in the Event Framework to support the document cancellation process. A new handler for this functionality is added to the event. Suppose that the automated cancellation process (EP_CANCEL_DOC) is enabled on the ePerformance Page. When an employee is terminated and the HR status becomes *Inactive* in the HR system, the update triggers the *AssignmentTerminated* event., which identifies all in progress documents that the terminated employee has, cancels them, and notifies the manager of the terminated employee about the cancellation.

If an employee's termination is future-dated, the cancellation process schedules a job in the Process Scheduler to run the cancellation process on the day of the termination. All outstanding documents will be canceled as of the termination date.

As mentioned, this process can be enabled on the ePerformance Page. As the administrator, you can also configure the system to either cancel all current documents, or only the ones that are associated with certain document types. If the notification option for canceling documents is enabled, managers will receive notifications about canceled documents.

Note: This functionality requires that both PeopleSoft HR and ePerformance reside on the same database. In addition to canceling in progress documents for terminated employees, the document cancellation process also cancels all evaluations (for example, peer or other) that the employee is a participant of, all pending approval requests created for the employee, and all of the employee's outstanding Outlook tasks.

Termination of Managers

If the terminated employee is a manager and has direct reports, the automated cancelation process cancels only the manager's own documents as an employee, and does not alter any documents of his or her direct reports. As the administrator, or the manager of the manager pending termination, it is recommended that you transfer the current documents of his or her direct reports to another manager manually before or after (administrator only) the actual termination takes place.

Transfer Document Page

Use the Transfer Document page (EP_APPR_SELECT) to select documents for transfer from one manager to another.

Navigation

- (Fluid) Select the Talent Administrator home page and click the Performance Administration tile. On the left navigation, select Documents >Transfer Document.

- (Classic) Workforce Development >Performance Management >Performance Documents >Administrative Tasks >Transfer Document >Transfer Document

- (Classic) Workforce Development >Performance Management >Development Documents >Administrative Tasks >Transfer Document >Transfer Document

- (Classic) Manager Self Service >Performance Management >Performance Documents >Administrative Tasks >Transfer Document >Transfer Document

- (Classic) Manager Self Service >Performance Management >Development Documents >Administrative Tasks >Transfer Document >Transfer Document

Image: Transfer Document page

This example illustrates the fields and controls on the Transfer Document page.

The ePerformance Administrator view, shown above, enables you to select and transfer documents regardless of the manager.

This functionality is sometimes used to finish evaluations when the manager is not available (for example, in cases where there is a reassignment, LOA, or any situation where the manager can't complete the document), You can narrow the search by entering one or more of the search fields.

If an administrator clicks Search without entering criteria, the system displays the first 300 employee evaluations in the organization.

The manager's view is limited to documents that the manager owns. The manager cannot search for other documents. After selecting one or more documents, click Continue. The system displays the Confirm Transfer page.

Related Links

Understanding Automatic Document Transfer
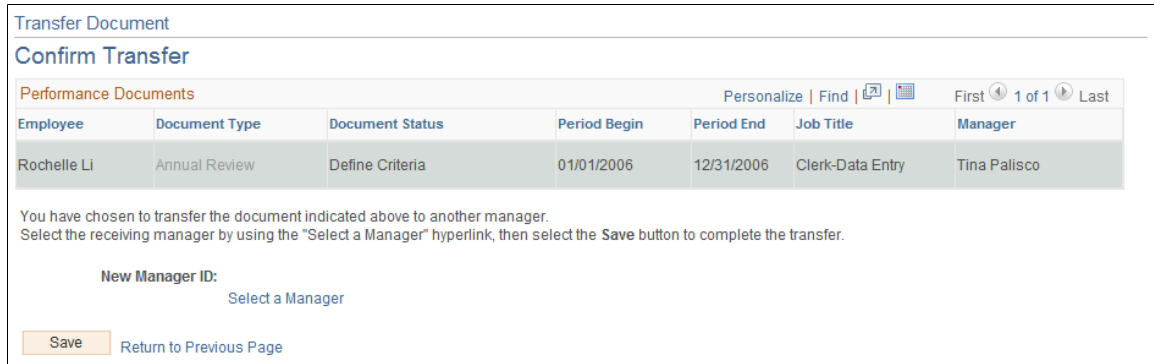
Confirm Transfer Page

Use the Confirm Transfer page (EP_APPR_XFER) to confirm the transfer of documents between managers.

Navigation

Select one or more documents and then click the Continue button on the Transfer Document page.

Image: Confirm Transfer page

This example illustrates the fields and controls on the Confirm Transfer page.

Employee	Document Type	Document Status	Period Begin	Period End	Job Title	Manager
Rochelle Li	Annual Review	Define Criteria	01/01/2006	12/31/2006	Clerk-Data Entry	Tina Palisco

Select a Manager	Click this link to select the manager to receive the transfer then click Save.

Reopen Document Page

Use the Reopen Document page (EP_APPR_SELECT) to change the status of documents that are currently in the evaluation phase back to *Evaluation in Progress*.

Navigation

- (Fluid) Select the Talent Administrator home page and click the Performance Administration tile. On the left navigation, select Documents >Reopen Document.

- (Classic) Workforce Development >Performance Management >Performance Documents >Administrative Tasks >Reopen Document >Reopen Document

- (Classic) Workforce Development >Performance Management >Development Documents >Administrative Tasks >Reopen Document >Reopen Document

- (Classic) Manager Self Service >Performance Management >Performance Documents >Administrative Tasks >Reopen Document >Reopen Document

- (Classic) Manager Self Service >Performance Management >Development Documents >Administrative Tasks >Reopen Document >Reopen Document

Image: Reopen Document page

This example illustrates the fields and controls on the Reopen Document page.

All documents in the *Approval, Shared with Employee, Pending Acknowledgement,* or *Acknowledged* status can appear in the list for managers.

To change the document status back to *Evaluation In Progress*, select one or more documents and then click the Continue button. A confirmation page appears on which you can either confirm the status change or return without changing status.

Note: The Reopen Document page only changes the status of the overall document and the manager evaluation. The manager or HR Administrator must reset the status of individual evaluations within each evaluation if needed.

Search for Documents

The administrator view of this page contains search fields to narrow the list by manager first or last name, employee first or last name, document type, document status, or period between. While managers can reopen documents of a few document statuses (as specified in the instructional text), administrators can reopen documents that are those statuses, plus *Canceled* and *Completed*.

Related Links
Managing Document Processes

Cancel Document Page

Use the Cancel Document page (EP_APPR_SELECT) to cancel documents.

Navigation

- (Fluid) Select the Talent Administrator home page and click the Performance Administration tile. On the left navigation, select Documents >Cancel Document.

- (Classic) Workforce Development >Performance Management >Performance Documents >Administrative Tasks >Cancel Document >Cancel Document

- (Classic) Workforce Development >Performance Management >Development Documents >Administrative Tasks >Cancel Document >Cancel Document

- (Classic) Manager Self Service >Performance Management >Performance Documents >Administrative Tasks >Cancel Document >Cancel Document

- (Classic) Manager Self Service >Performance Management >Development Documents >Administrative Tasks >Cancel Document >Cancel Document

Image: Cancel Document page

This example illustrates the fields and controls on the Cancel Document page.

Administrators can cancel any non-canceled documents, whereas managers can cancel documents that are in these statuses: Define Criteria, Track Progress, or Evaluation in Progress.

Search for Documents

ePerformance administrators use this group box to search for non-canceled documents, regardless of the manager. If you click Search without entering criteria, all employee evaluations in the organization appear.

This group box is not available on this page if you log in as a manager.

<Performance or Development>Documents

This group box displays the results of the search. The administrator or manage can select one or more documents. A confirmation page displays after the system notifies the user the cancelation was completed.

Delete Documents Page

Use the Delete Documents page (EP_APPR_SELECT) to delete documents that you previously canceled.

Navigation

- (Fluid) Select the Talent Administrator home page and click the Performance Administration tile. On the left navigation, select Documents >Delete Document.

- (Classic) Workforce Development >Performance Management >Performance Documents >Administrative Tasks >Delete Document >Delete Documents

- (Classic) Workforce Development >Performance Management >Development Documents >Administrative Tasks >Delete Document >Delete Documents

- (Classic) Manager Self Service >Performance Management >Performance Documents >Administrative Tasks >Delete Document >Delete Documents

- (Classic) Manager Self Service >Performance Management >Development Documents >Administrative Tasks >Delete Document >Delete Documents

Image: Delete Documents page

This example illustrates the fields and controls on the Delete Documents page.

The ePerformance administrator view enables you to delete any documents that are *canceled*. You can narrow the search by entering selection criteria in one or more of the search fields. If you click Search without entering any data, all employee evaluations with a *canceled* status appear.

The manager's view displays canceled documents that the manager owns and does not enable the manager to enter search fields.

After selecting one or more documents, click Continue. The Confirm Delete page appears.

Managing Document Processes

This section presents an overview of document process management and lists the pages used to manage document processes.

Pages Used to Manage Document Processes

Page Name	Definition Name	Usage
View Performance Documents Page (View-Only Documents)	EP_APPR_SELECT	Select to view performance documents. See Current <Performance or Development> Documents Page or <Performance or Development> Documents Page
View Development Documents Page (View-Only Documents)	EP_APPR_SELECT	Select to view development documents. See Current <Performance or Development> Documents Page or <Performance or Development> Documents Page

Understanding Document Process Management

If you have the ePerformance administrator role, you can view any document in any status and perform certain tasks that change the document status or due date. This is a *safety valve* in case the employee or manager are unable to complete the tasks.

Follow these steps:

1. To view or update a document as an administrator, enter selection criteria on one of the view documents pages (Performance or Development) and select the document that you want to view from the results list.

2. Click the View link under the step to open the corresponding document or evaluation that needs to be changed..

   You can view details of a step only after the step is started.

3. Perform tasks on the document.

   The tasks that are available to you depend on the status of the document or role evaluation. These are:

   • Change the due date.

   • Reopen document or evaluation.

   • Cancel evaluation.

The procedures for selecting documents, viewing document details, and performing tasks as an administrator are the same as the procedures for any other role.

Related Links
Accessing Documents
Modifying Evaluation Criteria

Creating Business Objectives Pages

This topic provides an overview on the administration of business objectives pages, lists common elements used in this topic, and discusses how to create business objectives pages.

Pages Used to Create Business Objectives Pages

Page Name	Definition Name	Usage
Create Business Objectives - Select Objective Plan Page	EPO_PLAN_SELECT	Create business objectives for objective plans.
Create Business Objectives Page	EPO_CREATE_PAGE	Enter the criteria to be used to create the business objective pages.
Create Objective Pages - Confirmation Page	EPO_CREATE_RSLTS	View the results of the create process to verify that your objective pages were created successfully.

Understanding the Creation of Business Objectives Pages

This section discusses these topics:

- Process overview.

- Administrator role.

- Manager role.

Process Overview

You can share the administration or management of the objectives pages between the administrator and the objective page owner. The objective page owner is typically the executive or manager responsible for the objectives at a particular level of the organization.

Administrators, as well as the objectives page owners, have the ability to update objective pages once they are created. At the upper levels of the organization, the responsibility typically falls to the administrator or the executives administrative assistant; however, as the process moves down the organization, the individual owners are more likely to update the pages themselves.

The system allows both roles to update the objectives pages. For this reason, the page owner will have access to some of the administrative capabilities.

Administrator Role

Once you setup the plan, complete the templates, and identify business objective nodes, the administrator creates and administers the pages that are built from the templates. These transactions include the ability to create, update, view, and publish the objective pages.

PeopleSoft has created a permission list to support the objective functionality. This permission list is called Manage Objective Pages and includes these transactions:

- Create Objective Pages.

- Administer Objective Pages (Update).

- Publish Objective Pages.

PeopleSoft has added this permission list to the ePerformance HR Admin role. This role is responsible for administering all the day to day ePerformance activities under Workforce Development >Performance Management. This role is used for allowing access to the new pages described within this section.

Note: Before you can create business objective pages, you must first identify the nodes using the Identify Business Objective Nodes page.

See <u>Identifying Business Objective Nodes</u>.

Manager Role

Once the page has been created and the page owner has been identified, each page owner will need access to their objectives page to add and update their objectives. They will also be able to access other business objective pages once they have been created.

Oracle modified the *ePerformance - Manager* Permission List (HCCPSS2150) to support the objective functionality. This permission list includes the Update Objective Pages and View Objectives Pages transactions.

Common Elements Used in this Section

Objective Plan	Select the objective plan that you want to use to create, publish or update pages. After you select a plan, this field appears as display only on many pages. The system only displays plans that have a status of *Active*.
Template	Select the template that you want to use to create objective pages. After you select a template, this field appears as display only on many pages. The system only displays templates that are effective as of the Objective Plan date.

Create Business Objectives - Select Objective Plan Page

Use the Create Business Objectives - Select Objective Plan page (EPO_PLAN_SELECT) to create business objectives for objective plans.

Navigation

Workforce Development > Performance Management >Business Objectives >Create Business Objectives >Create Business Objectives - Select Objective Plan

Image: Create Business Objectives - Select Objective Plan page

This example illustrates the fields and controls on the Create Business Objectives - Select Objective Plan page.

Click the link associated with the objective plan for which you want to create objective pages.

Create Business Objectives Page

Use the Create Business Objectives page (EPO_CREATE_PAGE) to enter the criteria to be used to create the business objective pages.

Navigation

Click the link associated with the objective plan for which you want to create business objective pages on the Create Business Objectives - Select Objective Plan page.

Image: Create Business Objectives page

This example illustrates the fields and controls on the Create Business Objectives page.

Home Page Creation Details

Template	Select the template that you want to use to create objective pages. The system only displays templates that are effective as of the Objective Plan date.
Publication Due Date	Enter the date that pages owners should complete their page by and submit it for publication.
Set Owner to Department Manager or **Set Owner to Position Manager**	This field changes based on the hierarchy method associated to the objective plan you selected. Select this check box to assign the page owner to either department manager or position manager.

Department Selection

If you selected *Department* as the hierarchy method on the Objective Plan page, the system displays these fields in the grid:

Set ID	Enter or select the set ID of the department that for which the page will be created.
Department	Enter or select a department ID. The system displays only active departments in effect as of the effective date of the objective plan.
Create Objective Pages	Click to create the objective pages for the departments that you selected in the Department Selection grid. The system displays the Create Objective Pages - Confirmation page. This page lets

you know which pages have been created and which pages have not been created.

Position Selection

If you selected *Position* as the hierarchy method on the Objective Plan page, the system displays these fields in the grid:

Position Number	Enter or select a position number. The system displays only active positions in effect as of the effective date of the objective plan.
Position Name	Once you select a position, the system displays the position name.
Create Objective Pages	Click to create the objective pages for the positions that you selected in the Position Selection grid. The system displays the Create Objective Pages - Confirmation page. This page lets you know which pages have been created and which pages have not been created.

Create Objective Pages - Confirmation Page

Use the Create Objective Pages - Confirmation page (EPO_CREATE_RSLTS) to view the results of the create process to verify that your objective pages were created successfully.

Navigation

Click the Create Objective Pagesbutton on the Create Business Objectives page.

Image: Create Objective Pages - Confirmation page

This example illustrates the fields and controls on the Create Objective Pages - Confirmation page.

After clicking on the Create Objective Pages button, this page will show which objective pages were successfully created and which ones failed with a message describing the problem. The same page is used for Department and Position hierarchies.

If you select Department the system displays the Selected Departments group box, which includes these fields: Set ID, Department, Description, Page Owner, and Message. Under a separate heading, this page will also display any pages that were not created.

Managing Business Objectives

This topic discusses how to manager business objectives.

Pages Used to Manage Business Objectives

Page Name	Definition Name	Usage
Manage Business Objectives - Select Objective Plan Page	EPO_PLAN_SELECT	Select an objective plan of the objective page to update by administrators.
Manage Business Objectives - Select Business Objectives Page	EPO_PAGE_SELECT	Search for a business objective of the selected objective plan to update or view by administrators.
Manage My Objectives - Select Business Objectives Page	EPO_PAGE_SELECT	Update or view objectives by managers.
View Objectives Page	EPO_PAGE_SELECT	View objectives by employees.
Update Objectives - <Department or Position> Page	EPO_MAIN	Update or add pre-coded or free-form items to the sections and align them to the objectives listed on the page. After making changes, users can also save, cancel, preview, submit for publication, send messages to the owners of business objectives pages, and view different objectives by launching an organizational chart to locate departments that have established business objectives.
View Objectives - <Name of Objective> Page	EPO_MAIN	Review the department, period, objective plan, objective owner, title, and template ID associated with the business objective. Users can also click an icon to view the number employees aligned to organizational objectives listed on the page and click a link to launch an organizational chart to locate departments that have established business objectives.

Manage Business Objectives - Select Objective Plan Page

Use the Manage Business Objectives - Select Objective Plan page (EPO_PLAN_SELECT) to select an objective plan of the objective page to update by administrators.

Navigation

- (Fluid) Select the Talent Administrator home page and click the Performance Administration tile. On the left navigation, select Objectives >Manage Business Objectives.

- (Classic) Workforce Development >Performance Management >Business Objectives >Manage Business Objectives >Manage Business Objectives - Select Objective Plan

Image: Manage Business Objectives - Select Objective Plan page

This example illustrates the fields and controls on the Manage Business Objectives - Select Objective Plan page.

Objective Plan	Objective Plan Begin date	Objective Plan End Date
Test 2007 Organizational objectives	01/01/2007	12/31/2007
2008 Business Objectives	01/01/2008	12/31/2008
2009 Business Objectives	01/01/2009	12/31/2009
Test Plan - 2008	01/01/2008	12/31/2008
Objective Volume testing - Position hierarchy	01/01/2009	12/31/2009

Note: This page is specific to administrators and does not apply to managers and employees.

Objective Plan	Click to open an objective plan from which you search for and select an objective to update or view.

Manage Business Objectives - Select Business Objectives Page

Use the Manage Business Objectives - Select Business Objectives page (EPO_PAGE_SELECT) to search for a business objective of the selected objective plan to update or view by administrators.

Navigation

- Click an objective plan link on the Manage Business Objectives - Select Business Objectives page (EPO_PLAN_SELECT).

- Manager Self ServicePerformance ManagementBusiness ObjectivesManage My ObjectivesManage My Objectives - Select Business Objectives

Image: Manage Business Objectives - Select Business Objectives page

This example illustrates the fields and controls on the Manage Business Objectives - Select Business Objectives page.
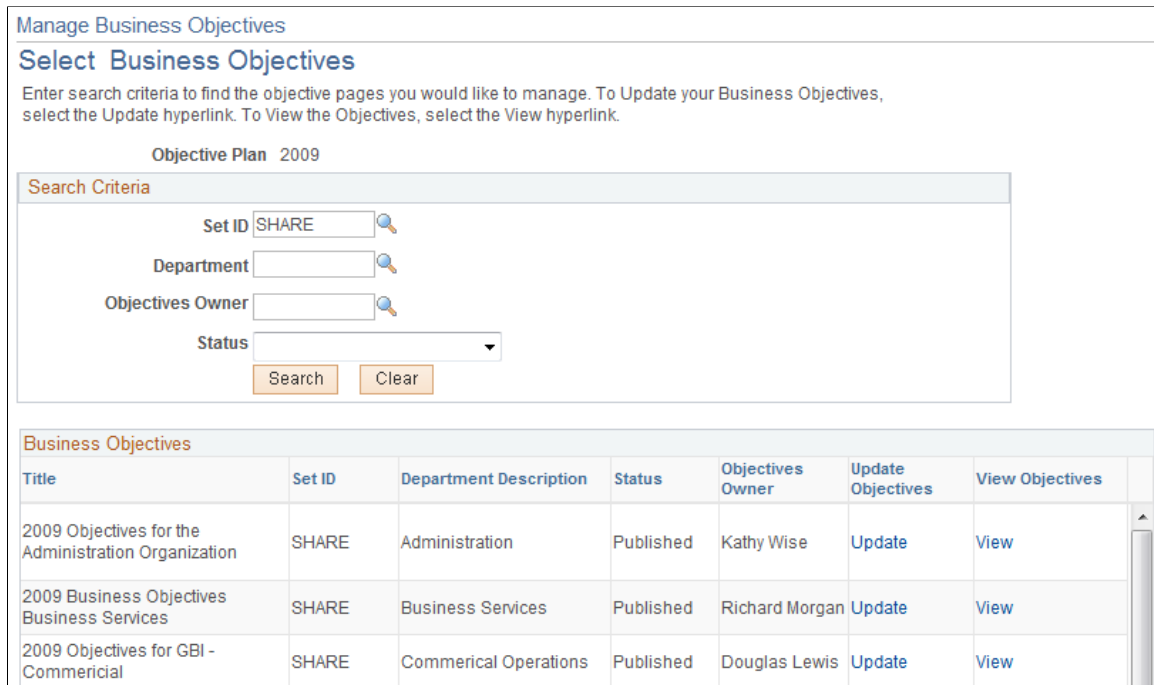
Note: This page illustrates what an administrator would see when they access this page using the Workforce Development navigation path. Managers and employees who use either the Manager Self Service or Self Service path would see a slightly different page. Administrators can update and view all business objectives, regardless of status. Managers can update and view business objectives that they own that are in the *Published* status. Employees can view business objectives that their direct managers own that are in the *Published* status.

The name of this page is renamed to *Manage My Objectives - Select Business Objectives* for managers, and *View Objectives* for employees.

Search Criteria

This section is only available for the administrator view of the page.

Position or **Department**	Enter or select the department or position associated with the pages for which you are searching.
Objective Owner	Select the owner of the objective for which you are searching.
Status	Select one of these values:

- *In Progress - Assigned*

- *In Progress - Unassigned*

- *Published*

- *Ready To Publish*

Search	Click to generate a list of pages that match the search criteria.

Business Objectives

Update	Click to access the Update Objectives - <Department or Position> page in update mode. Before accessing the page, you need to specify the new effective date that will be set for the Business Objectives page.
View	Click to access the View Objectives page in view only mode.

Update Objectives - <Department or Position> Page

Use the Update Objectives - <Department or Position> page (EPO_MAIN) to update or add pre-coded or free-form items to the sections and align them to the objectives listed on the page.

Navigation

- Click the Update link on the Manage My Objectives - Select Business Objectives page. Select a new effective date for the Objective page (for manager).

- Select an objective plan on the Manage My Objectives - Select Business Objectives page. Enter criteria to search for business objectives and click the Update link of the objective you want to update (for administrator).

Image: Update Objectives - <Department or Position> page (1 of 3)

This example illustrates the fields and controls on the Update Objectives - <Department or Position> page (1 of 3).

Image: Update Objectives - <Department or Position> page (2 of 3)

This example illustrates the fields and controls on the Update Objectives - <Department or Position> page (2 of 3).

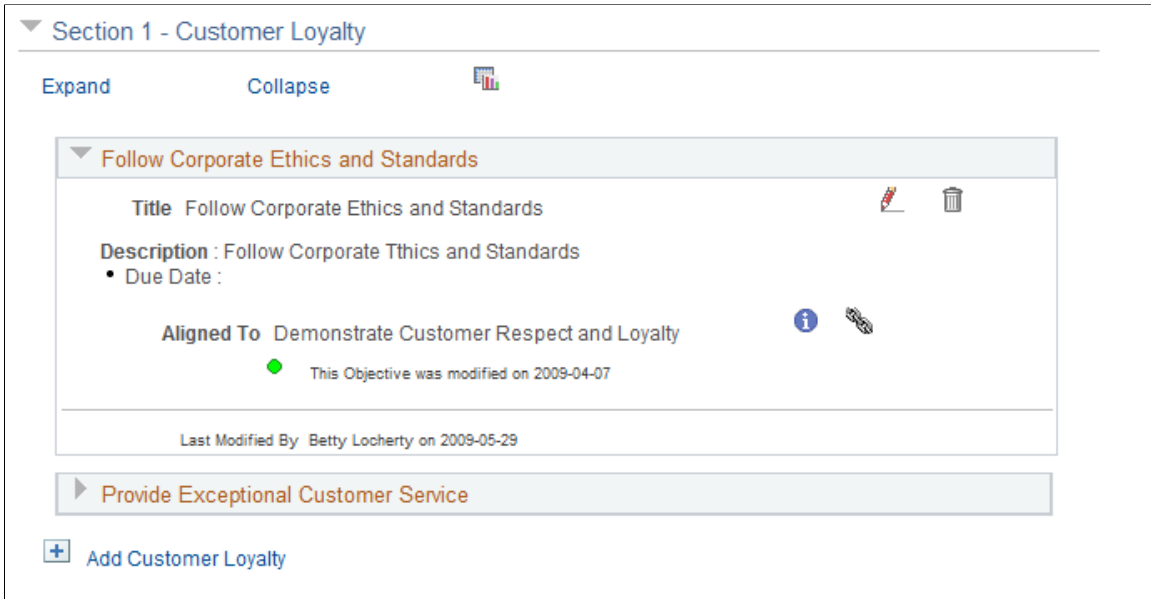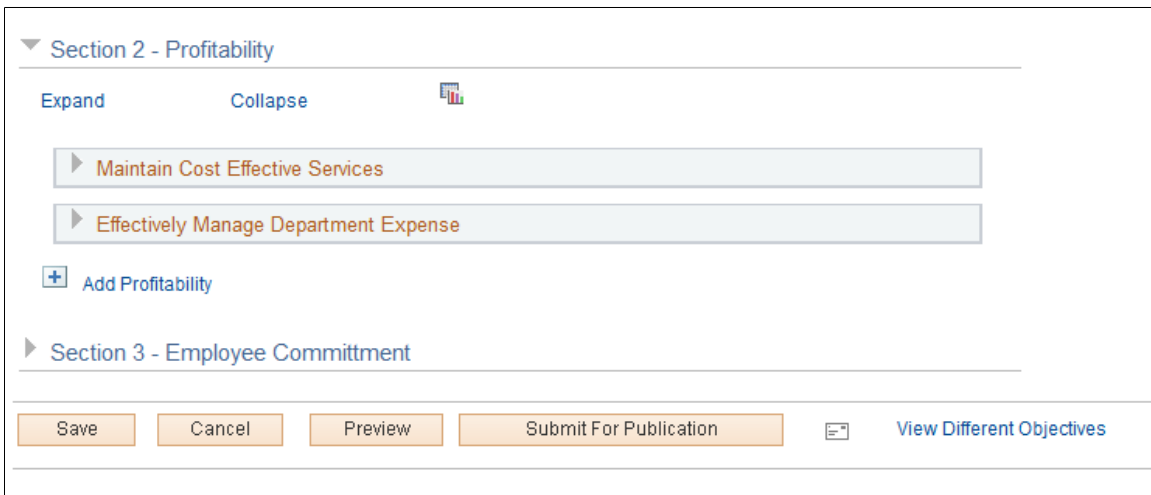**Image: Update Objectives - <Department or Position> page (3 of 3)**

This example illustrates the fields and controls on the Update Objectives - <Department or Position> page (3 of 3).

View History	Select a date from the drop-down list box and click Go to view a different version of the page. The system opens the View Objectives page in your browser and displays the version of the objectives that you selected.
Alternate Editor	Select another employee to act as an alternative editor to allow them access to review and update the objectives.
Comments	Enter any comments related to the objectives on the page or about any changes you are making or suggesting.

Preview	Click this button to access the View Objectives page (view-only mode). The system takes the information that you entered on the Update Objectives page and displays it in a new page that shows you how the page will look to other users when it is published.
Submit for Publication	Click this button to submit the objectives for publication. The system displays the Update Objectives - Submit for Publication Confirmation page. Click OK to submit the page for publication. After the status has changed, you cannot make updates to the Objective Page until after it is published.
View Different Objectives	Click this link to access the Search for Business Objectives page. The system displays this page as an objectives chart. Use this page to locate departments or positions that have established business objectives.
Long Format	Click to change the current display from tabs format to long format. This button appears if the display type specified in its objective template is not *Long Format*
Tabs Format	Click to change the current display from long format to tabs format. This button appears if the display type specified in its objective template is not *Long Format*
Aligned Items	Click the Aligned Items icon to view the number employees aligned to the item to which the icon is associated.
Add <Objective Name>	Click this link to access the Add an Item page. You can either enter a free-form item or a coded item from the Content Catalog. When you are finished, click the Next button to continue.
Alignment Chain	Click the Alignment Chain icon to access the Objective Alignment Chain page where you can view the alignment of the item with corporate and departmental objectives.
Objective Details	Click the Objective Details icon to access a page that lists the details associated with the item (for example, title, description, measurement and so on).

View Objectives - <Name of Objective> Page

Use the View Objectives - <Name of Objective> page (EPO_MAIN) to review the department, period, objective plan, objective owner, title, and template ID associated with the business objective.

Navigation

• Click the View link on the Manage My Objectives - Select Business Objectives page.

• Click the View link on the View Objectives page.

Image: View Objectives - <Name of Objective> page

This example illustrates the fields and controls on the View Objectives - <Name of Objective> page.
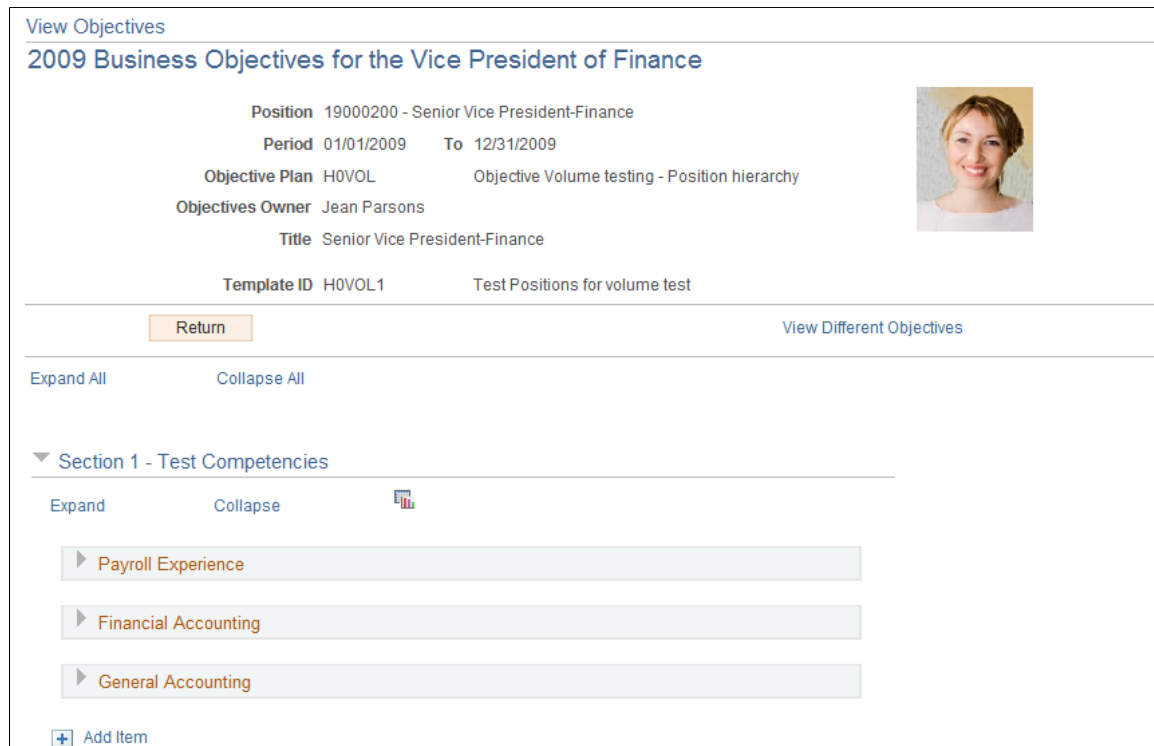
Note: This page illustrates what an administrator would see when they access this page using the Workforce Development navigation path. Employees who use the Self Service path would see a slightly different page. For example, the Aligned Items icon and Return button are not visible to employees.

The employee's picture is displayed on this page if the Display on Self Service option is enabled on the "HCM Options Page" (PeopleSoft HCM 9.2: Application Fundamentals).

Return	Click this button to return to the Select Business Objectives page.
View Different Objectives	Click this link to access the Search for Business Objectives page. The system displays this page as an objective chart. Use this page to locate departments or positions that have established business objectives.
Aligned Items	Click the Aligned Items icon to view the number employees aligned to the item to which the icon is associated on the <section name> page (EPO_ALIGN_SUM).

Publishing Business Objectives

This topic discusses how to publish business objectives.

Pages Used to Publish Business Objectives

Page Name	Definition Name	Usage
Publish Business Objectives - Select Objective Plan Page	EPO_PLAN_SELECT	Search for objective pages that you want to publish.
Publish Business Objectives - Select Page to Publish Page	EPO_PAGE_SELECT	Enter search criteria to locate the objective pages that you want to publish.
Publish Business Objectives - Confirm Publication Page	EPO_PAGE_PUBLISH	Publish objective pages.

Publish Business Objectives - Select Objective Plan Page

Use the Publish Business Objectives - Select Objective Plan page (EPO_PLAN_SELECT) to search for objective pages that you want to publish.

Navigation

Workforce Development >Performance Management >Business Objectives >Publish Business Objectives >Publish Business Objectives - Select Objective Plan

Image: Publish Business Objectives - Select Objective Plan page

This example illustrates the fields and controls on the Publish Business Objectives - Select Objective Plan page.

Select the link associated with the objective plan for which you wan to publish objective pages.

Publish Business Objectives - Select Page to Publish Page

Use the Publish Business Objectives - Select page (EPO_PAGE_SELECT) to enter search criteria to locate the objective pages that you want to publish.

Navigation

Select the link associated with the objective plan for which you want to publish objective pages on the Publish Business Objectives - Select Objective Plan page.

Image: Publish Business Objectives - Select Page to Publish page

This example illustrates the fields and controls on the Publish Business Objectives - Select Page to Publish page.

SetID	For department hierarchies enter or select the setID of the department for which the page will be created.
Department or **Position**	Enter or select the department or position for which the page will be created.
Search	Click to generate a list of pages that match the search criteria.
Continue	Select the pages you want to publish and then click this button to go to the Publish Business Objectives - Confirm Publication page.

Note: User access to published objectives is based on the role and security access that are assigned to users. Security access on objectives can be achieved, for example, through the creation of department trees or position hierarchies. |

Publish Business Objectives - Confirm Publication Page

Use the Publish Business Objectives - Confirm Publication page (EPO_PAGE_PUBLISH) to publish objective pages.

Navigation

Select the objective for which you want to publish objective pages and click the Continue button on the Publish Business Objectives - Select Page to Publish page.

| **Publish Pages** | Click to generate and send email notifications to individuals based on the installation options you selected on the Objective Pages page during installation (Set Up HCM, Install, Product Specific, ePerformance Installation, Objective Pages).

If you selected Notify Only on First Publication on the ePerformance Installation - Objective Pages page, the system sends notifications only the first time the objective page is |

published. Notifications are not sent for subsequent publications of the business objective.

Cascading Objective Items

This topic provides an overview of the cascading process and discusses how to cascade objective items.

Pages Used to Cascade Objective Items

Page Name	Definition Name	Usage
Select Objectives Page	EPO_SEL_OBJ	Select the objective items that you want to cascade to individual performance documents from the Business Objective pages.
Document Parameters Page	EPO_DOC_PARM	Select the ePerformance document parameters to which you want to cascade business objective items.

Understanding the Cascading Process

This section discusses:

- Process overview.

- Item updates.

Process Overview

ePerformance provides administrators with the ability to cascade objectives from the Business Objective pages to individual performance documents. This process is helpful in doing mass insertion of objective items into the performance documents of individuals.

The number of documents affected depends upon where in the organizational hierarchy from which the item is cascaded. For example, cascading objectives from the CEO or Executive Vice President level could impact thousands of documents in a large organization.

To review the list of documents that will be updated before the system actually updates the database, administrators can run the cascading process in preview mode. If an administrator selects the Preview Cascade Items option on the Select Objectives page, the system generates a report but does not actually cascade the items down to the documents.

Once items are cascaded, the documents display the items that are aligned to the organizational pages and the objectives from which the items were cascaded.

Item Updates

When an administrator runs the confirmation process, the system stores the objective item details that were cascaded on the documents. For items that are cascaded down to other documents, ePerformance

treats these items as mandatory and does not allow users (manager, employee or any participant) to delete items or update the fields that are cascaded down.

When modifications are made to the objectives and the pages are republished, the objective items are syndicated to the documents using the Syndication process which runs automatically during the Publication process.

If the status of the evaluation is *Define Criteria* or *Track Progress,* the system updates the item within the corresponding document. If the status of the evaluation is *Evaluation in Progress,* the system updates the item on each evaluation to which the item was cascaded.

There are two pages that the administrator needs to complete before they can run the process:

• Select Objectives:

   The administrator uses this page to select the objective page. They then choose the section (if more than one exists). Additionally they can indicate on this page whether or not to preview or confirm the process. Once an administrator enters the page information, the system displays the items from the page and section that was selected. The administrator can then select the items from this page that they want to cascade.

• Document Parameters:

   Before running the process, the administrator selects the ePerformance document parameters to which they want to cascade the items. The administrator selects the document type associated with the objective plan. The system automatically enters period begin and end dates from the period dates on the objective plan. The administrator, however, can overwrite these dates if they don't match the dates of the document. However, administrators can choose to not enter the period end date in order to select all documents started on or after begin date until the current date. The section name specifies the section of the documents where objectives items are cascaded. From here administrators can choose the level from which they want to cascade items downward.

   Note: This process does not work as well for organizations that use anniversary dates to drive performance evaluations.

When the administrator runs the process, the system selects all documents for employees using the ePerformance Document Parameters that the administrator entered. Assuming the administrator selected the Confirm Cascade Items option, the system cascades the items to the documents that have the status of *Define Criteria, Track Progress*, or *Evaluation In Progress,* which also contain the same content type as the objective section. The system generates a report that displays all employees in the selection method to which the items were successfully cascaded. The system also generates a list of all employees in the selection method to which the items can't be cascaded along with the reasons the cascade was not successful.

Note: The system will not cascade an item if the status of the document is *Canceled.*

Select Objectives Page

Use the Select Objectives page (EPO_SEL_OBJ) to select the objective items that you want to cascade to individual performance documents from the Business Objective pages.

Navigation

Image: Select Objectives page

This example illustrates the fields and controls on the Select Objectives page.

Objective Plan	Select the objective plan that contains the object items that you want to cascade down to employee documents. The system refreshes the page and then displays the Set ID and Department ID fields if the plan is based on the department hierarchy.
	If the objective plan is associated with a position ID, the system displays this field instead of Set ID and Department ID.
Set ID	The system automatically enters the set ID associated with the objective plan. You can, however select a different set ID if needed.
Department ID	Enter the department ID associated with the objective plan.
Position ID	Enter the position ID associated with the objective plan. If the objective plan is associated with a position ID, the system displays this field instead of Set ID and Department ID.
Cascade Run Type	Select Preview Cascade Items if you want to preview the results of the process but not cascade the items to the documents you select on the Document Parameters page. Select Confirm Cascade Items if you want to run and cascade the items to the documents. The default for this option is Preview Cascade Items.
Section Type	Select the section type associated with the objective plan that you want to cascade down to your organization.

|	
Page Title and **Page Owner**	The system displays the page title and page owner when you select a value for the Position ID field or the Department ID field.
Section \<Name\>	When you select a value for the Section Type field, the system displays a list of objectives associated with the objective plan and section. Select the objectives that you want to cascade down to the documents that you select on the Document Parameters page.

Document Parameters Page

Use the Document Parameters page (EPO_DOC_PARM) to select the ePerformance document parameters to which you want to cascade business objective items.

Navigation

Workforce Development >Performance Management >Business Objectives >Cascade Objective Items >Document Parameters

Image: Document Parameters page

This example illustrates the fields and controls on the Document Parameters page.
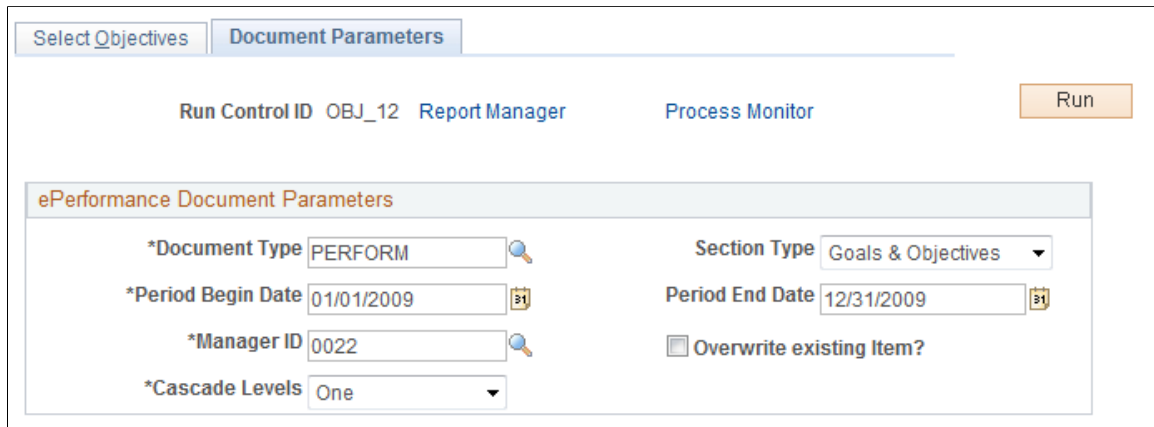
Document Type	Select the document type associated with the objective plan that you selected on the Select Objectives page.
Section Type	Select a section type to which you want to cascade objective items. The drop-down list box displays all section that have same content type as the section of the Objective page.
Period Begin Date and **Period End Date**	The system automatically enters period begin and end dates from the period dates on the objective plan. You can, however, overwrite these dates if they don't match the dates of the document. The dates entered here are used to select documents that fall within the range.
Manager ID	This field determines the manager that the system should start at to establish the population of employee documents. The

<table>
<tr><td></td><td>system follows the direct report method used in ePerformance to determine the manager's direct reports.</td></tr>
<tr><td>**Overwrite existing item?**</td><td>Select this check box if you want to overwrite items that already exist on the documents to which you are cascading items.</td></tr>
<tr><td>**Cascade Levels**</td><td>Select either *One* or *All* to indicate the number of levels to which you want to cascade items down to the selected documents.

Selecting *All* will cascade items to the documents of all direct and indirect reports of the manager. Selecting *One* will only cascade items to documents of the manager's direct reports.</td></tr>
</table>

Administering Business Objectives

This topic discusses how to administer business objectives.

Pages Used to Administer Business Objectives

Page Name	Definition Name	Usage
Assign/Transfer Business Objectives - Select Objective Plan Page	EPO_PLAN_SELECT	Select an objective plan of which business objectives are to be assigned or transferred.
Assign/Transfer Business Objectives Page	EPO_PAGE_SELECT	Assign Objectives pages to an owner, or transfer ownership of Objectives pages that have already been assigned to a different owner.
Manage Objectives Status - Select Objective Plan Page	EPO_PLAN_SELECT	Select an objective plan of which business objectives are to be processed.
Manage Objectives Status Page	EPO_PAGE_SELECT	Perform these actions on business objectives: delete, inactivate, lock, reactivate, or unlock objectives.
Review Late Objectives - Select Objective Plan Page	EPO_PLAN_SELECT	Select an objective plan of which late business objectives are to be reviewed.
Review Late Objectives Page	EPO_PAGE_SELECT	Search for objectives that have not been published and the published due date is prior to today.
Review Objectives by Status - Select Objective Plan Page	EPO_PLAN_SELECT	Select an objective plan of which late business objectives are to be reviewed (by status).

Page Name	Definition Name	Usage
Review Objectives by Status Page	EPO_PAGE_SELECT	Review objectives by status. You can search for Objectives pages that are in any of these statuses: *In Progress - Assigned, In Progress - Unassigned, Inactive, Published,* and *Ready to Publish.*

Common Elements Used in this Section

Department   Select the department for which you want to administer an action.

Objectives Owner   Select the owner of the objectives for which you want to administer an action.

Status   To filter the search results, select one of these statuses:

- *In Progress - Assigned*

- *In Progress - Unassigned*

- *Inactive*

- *Published*

- *Ready to Publish*

Note: If you do not select a status, the system displays all objectives regardless of status when you click search. In addition not all statuses are available for selection on every page.

Select   Select the check box associated with the objectives for which you want to initiate an action.

Continue   After you select one or more objectives, click this button go to the next page which you can use to notify the page owners of the action that you are taking. If you are assigning the Objectives page to a different owner, the system displays a page that enables you to search for and select an owner.

Assign/Transfer Business Objectives Page

Use the Assign/Transfer Business Objectives page (EPO_PAGE_SELECT) to assign Objectives pages to an owner, or transfer ownership of Objectives pages that have already been assigned to a different owner.

Navigation

Click an objective plan on the Assign/Transfer Business Objectives - Select Objective Plan page.

Image: Assign/Transfer Business Objectives page

This example illustrates the fields and controls on the Assign/Transfer Business Objectives page.

Action	Select one of these actions, enter your search criteria, and then click Search to view a list of objectives:

- *Transfer Business Objectives*

- *Assign Objective Owner*

Note: The system disables the Objectives Owner and Status fields if you select the *Assign Objective Owner* action.

Manage Objectives Status Page

Use the Manage Objectives Status page (EPO_PAGE_SELECT) to perform these actions on business objectives: delete, inactivate, lock, reactivate, or unlock objectives.

Navigation

Click an objective plan on the Manage Objectives Status - Select Objective Plan page.

Image: Manage Objectives Status page

This example illustrates the fields and controls on the Manage Objectives Status page.

Action	Select one of these actions, enter your search criteria, and then click Search to view a list of objectives:

- *Delete Business Objectives*

- *Inactivate Objectives*

- *Lock Objectives*

- *Reactivate Objectives*

- *Unlock Objectives*

Note: If you select *Reactivate Objectives,* the system automatically selects *Inactive* as the status.

Review Late Objectives Page

Use the Review Late Objectives page (EPO_PAGE_SELECT) to search for objectives that have not been published and the published due date is prior to today.

Navigation

Click an objective plan on the Manage Objectives Status - Select Objective Plan page.

Image: Review Late Objectives page

This example illustrates the fields and controls on the Review Late Objectives page.

Select the *Review Late Objectives* action, enter your search criteria, and then click Search to view a list of objectives.

Note: The system disables the Objectives Owner and Status fields for this action.

Review Objectives by Status Page

Use the Review Objectives by Status page (EPO_PAGE_SELECT) to review objectives by status.

Navigation

Click an objective plan on the Review Objectives by Status - Select Objective Plan page.

Image: Review Objectives by Status page

This example illustrates the fields and controls on the Review Objectives by Status page.

Select the *Review Objectives by Status* action, enter your search criteria, and then click Search to view a list of objectives.

Creating Objectives Summary Data

This topic discusses how to create summary data for objectives.

Page Used to Create Objective Summary Data

Page Name	Definition Name	Usage
Create Objectives Summary Data Page	EPO_OBJ_ALIGN_EXT	Extract data by objective plan that the system will use to generate the Employees Aligned to Business Objectives metric.

Create Objectives Summary Data Page

Use the Create Objectives Summary Data page (EPO_OBJ_ALIGN_EXT) to extract data by objective plan that the system will use to generate the Employees Aligned to Business Objectives metric.

Navigation

- (Fluid) Select the Talent Administrator home page and click the Performance Administration tile. On the left navigation, select Objectives >Create Objectives Summary Data.

- (Classic) Workforce Development >Performance Management >Business Objectives >Create Objectives Summary Data >Create Objectives Summary Data

Image: Create Objectives Summary Data page

This example illustrates the fields and controls on the Create Objectives Summary Data page.

Select the objective plan and you want to create summary data and then click Run.

Identifying Business Objective Nodes

This topic discusses how to identify business objective nodes.

Note: Before you can create Business Objective pages, you must identify the nodes (departments or positions) that are going to have business objective pages.

Pages Used to Identify Business Objective Nodes

Page Name	Definition Name	Usage
Identify Business Objective Nodes - Select Objective Plan Page	EPO_PLAN_SELECT	Select the objective plan for which you want to identify nodes.
Identify Business Objective Nodes Page	EPO_PAGE_SETUP	Identify nodes that will have business objective pages.

Identify Business Objective Nodes - Select Objective Plan Page

Use the Identify Business Objective Nodes - Select Objective Plan page (EPO_PLAN_SELECT) to select the objective plan for which you want to identify nodes.

Navigation

Workforce Development >Performance Management >Business Objectives >Identify Objective Nodes >Identify Business Objective Nodes - Select Objective Plan

Image: Identify Business Objective Nodes - Select Objective Plan page

This example illustrates the fields and controls on the Identify Business Objective Nodes - Select Objective Plan page.

Identify Business Objective Nodes		
Select Objective Plan		
Choose an Objective Plan by selecting the appropriate hyperlink		
Objective Plan		
Objective Plan	**Objective Plan Begin date**	**Objective Plan End Date**
Test 2007 Organizational objectives	01/01/2007	12/31/2007
2008 Business Objectives	01/01/2008	12/31/2008
2009 Business Objectives	01/01/2009	12/31/2009
Test Plan - 2008	01/01/2008	12/31/2008
Objective Volume testing - Position hierarchy	01/01/2009	12/31/2009

Click a link associated with the objective plan for which you want to identify business objective nodes. The system displays the Identify Business Objective Nodes page.

Identify Business Objective Nodes Page

Use the Identify Business Objective Nodes page (EPO_PAGE_SETUP) to identify nodes that will have business objective pages.

Navigation

Select the link associated with the objective plan for which you want to identify nodes.

Image: Identify Business Objective Nodes page

This example illustrates the fields and controls on the Identify Business Objective Nodes page.

Department	Select the department or position for which you want to identify nodes.
Search	After you select a department or position, click this button to display the target department and direct reports.
Drill Up	Click to display the department or position and the child nodes that the department or position you originally selected reports up to.
🔲 **View Chart**	Click the View Chart icon to access the Search for Business Objectives page which displays a graphical representation of departments or positions that have business objective pages.
Select	Select the check boxes of the nodes that will have business objective pages.
Drill Down	Click to display the departments or positions and the child nodes that report to the manager listed in the Manager Name column.
Review Plan Nodes	Click this button to access the Review Objective Pages page and view the nodes assigned to the objective plan. This page lists the department ID or position, title, and manager's name.

Restarting Objective Batch Processes

This topic discusses how to restart an objective batch process.

Page Used to Restart Batch Processes

| Page Name	Definition Name	Usage
Restart Batch Processes Page	EPO_BATCH_RESTART	Restart the Notification and Syndication batch processes.

Restart Batch Processes Page

Use the Restart Batch Processes page (EPO_BATCH_RESTART) to restart the Notification and Syndication batch processes.

Navigation

Workforce Development >Performance Management >Business Objectives >Restart Batch Processes >Restart Batch Processes

Image: Restart Batch Processes page

This example illustrates the fields and controls on the Restart Batch Processes page.

Restart Batch Processes

| Run Control ID | Report Manager | Process Monitor |

There are no processes to be re-started.
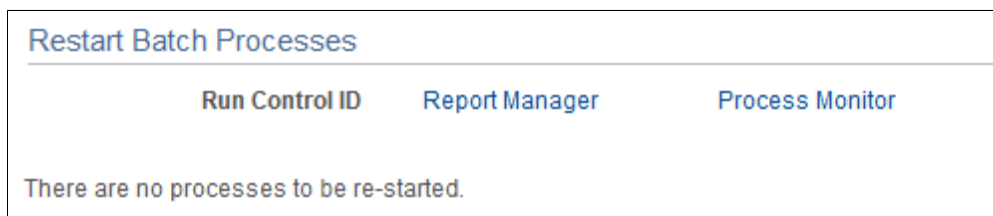
Select one or more processes and then click the Submit button.

Generating Reports

This topic provides an overview of reports in ePerformance, lists a prerequisite for generating reports, and discusses how to generate reports.

Pages Used to Generate Reports

Page Name	Definition Name	Usage
Missing Documents Page	RUNCTL_EP_RPT	Generate reports for missing documents.
Late Documents Page	RUNCTL_EP_RPT	Generate reports for late documents.

Understanding Reports in ePerformance

These are the reports that ePerformance provides to assist human resources (HR) administrators in tracking late or missing documents:

• Missing Documents

   This report lists documents that were not created for a group of employees that you select by group ID, document type, and date range. Knowing whether documents are missing is important if the HR department has defined desired rating distribution percentages, as the results of the distribution report are not reliable unless everyone in the group has a document and receives a rating during the period.

• Late Documents

   Use this report to generate a list of late documents, by document type, for a group of employees. If the current date is greater than any due date that a document has, the document is flagged as late and the employee of that document will be listed on the report. This report ignores documents that are canceled.

Prerequisite for Generating Reports

Before running any reports, you must first ensure that the groups of employees for which to run the reports are established. This is essential because the reports run against groups of employees.

Related Links

"Understanding Group Build" (PeopleSoft HCM 9.2: Application Fundamentals)
ePerformance Reports: A to Z

Missing Documents Page

Use the Missing Documents page (RUNCTL_EP_RPT) to generate reports for missing documents.

Navigation

Workforce Development >Performance Management >Reports >Missing Documents Report >Missing Documents

Image: Missing Documents page

This example illustrates the fields and controls on the Missing Documents page.

Group As Of Date	Enter a group as of date.
	The report generates a list of missing documents for employees belonging to the group that is defined in the Group ID field as of the date specified.
Group ID	Identify the group of employees to include in the report.
Document Type	Select a document type, such as quarterly, annual, or yearly. You define document types on the Document Types page.
From Date and **To Date**	The from and to dates establish a date range that the system uses in conjunction with the period basis to select documents to include in the report. For example, if you define a from and to date range of January 1, 2008 to December 31, 2008, and the period basis is *Period End Date,* the report only selects documents whose period end date falls between those dates.
Period Basis	The period basis determines which of the dates on the manager evaluation the system uses when selecting missing documents to publish in the report. Select one of these options:

- Period Begin Date

  Select this option to look for employees who do not have a document of the specified type with a period begin date falling within the range that you entered in the From Date and To Date fields.

- Period End Date

  Select this option to look for employees who do not have a document of the specified type with a period end date falling within the range entered in the From Date and To Date fields.

- Due Date

Select this option to look for employees who do not have a document of the specified type with a due date falling within the range entered in the From Date and To Date fields.

Late Documents Page

Use the Late Documents page (RUNCTL_EP_RPT) to generate reports for late documents.

Navigation

Workforce Development >Performance Management >Reports >Late Documents Report >Late Documents

Image: Late Documents page

This example illustrates the fields and controls on the Late Documents page.

Language	Select the language in which you want to generate the report.
Group As Of Date	Select the as of date. The report generates a list of late documents for employees belonging to the group that is defined in the Group ID field as of the date specified.
Group ID	Enter the group ID of the employees for whom you want to generate the report.
Document Type	Select a document type, such as quarterly, annual, or project review. You define document types on the Document Types page.

Related Links
Understanding Inquiry Pages

Chapter 17

Using Inquiry Pages

Understanding Inquiry Pages

Managers, employees, and human resources (HR) administrators can access different inquiry pages that enable them to view data of interest to their role. This section discusses:

- Manager and employee pages.

- Administrator pages.

- Pagelets.

Manager and Employee Pages

Managers and employees can view lists of their completed documents for both performance and development evaluations and can drill down to detail documents.

Additionally, managers can:

- View the approval status of documents for their direct reports (View Approval Status page).

- Access documents for their indirect reports in view-only mode (view-only documents under Manager Self Service).

- Access the chart that summarizes the status of documents for their direct reports (View Status Summary page).

Administrator Pages

The following inquiry pages are designed specifically for HR administrators:

- Rating Distribution Summary page.

  Contains preliminary, actual, and desired rating distributions for a group of employees, defined by group ID, in the form of a bar chart. Administrators use this page to determine whether ratings are distributed in the expected manner, and to plan how to bring actual ratings in line with desired ratings.

- Status Summary page.

  Contains a pie chart that summarizes the status of documents for a group of employees.

- Debug/Trace Results page.

  Lists the detailed calculations that are associated with a particular document. An HR administrator can use this information to debug suspected problems with rating calculations.

  Note: Producing this page can have a significant impact on system performance.

Pagelets

ePerformance delivers these pagelets to provide managers quick access to information they need to monitor employee's progress on performance and take necessary actions:

• Employee Performance — view alerts that are generated for documents for which the manager is responsible.

    See "Employee Performance Pagelet" (PeopleSoft HCM 9.2: HCM Portal Pack).

• My Team's Performance Status — review statuses of employees' performance or development documents in the manager's organization.

    This pagelet is available for selection on the Manager Dashboard and the PeopleSoft Home Page.

    See "My Team's Performance Status Pagelet" (PeopleSoft HCM 9.2: eProfile Manager Desktop)

These pagelets are available if PeopleSoft Applications Portal is installed. To make them available for selection, for example, under the HCM Portal Pack section of the home page personalization:

1. Navigate to PeopleTools >Portal >Structure and Content. Click the Portal Objects link on the Structure and Content page.

2. Click the Homepage link on the Structure and Content page.

3. Click the Tabs link on the Structure and Content page. Click the Edit link for the My Page row.

4. Select the Tab Content page. In the HCM Portal Pack section, select the pagelet you want the system to display for users in the content personalization for home page.

Users can personalize (from the pagelet header) the options and parameters used to build these pagelets.

Viewing Historical Documents

This topic discusses how to access historical documents.

Pages Used to View Historical Documents

Page Name	*Definition Name*	*Usage*
<u><Performance or Development> Document History Page</u>	EP_APPR_SELECT	Access completed documents for employees that you manage or for yourself.
My Historical Evaluations for Others Page	EP_APPR_OTH_SELECT	Access completed documents for multi-participant evaluations in which you participated. See <u><Performance or Development> Document History Page</u>

<Performance or Development> Document History Page

Use the <Performance or Development> Document History page (EP_APPR_SELECT) or My Historical Evaluations for Others page (EP_APPR_OTH_SELECT) to access completed documents for employees that you manage, for yourself, or for multi-participant evaluations in which you participated.

Navigation

- Manager Self Service >Performance Management >Performance Documents >Historical Documents >Performance Document History

- Manager Self Service >Performance Management >Development Documents >Historical Documents >Development Document History

- Self Service >Performance Management >My Performance Documents >Historical Documents >Performance Document History

- Self Service >Performance Management >My Development Documents >Historical Documents >Development Document History

- Self Service >Performance Management >Other's Performance Documents >Historical Evaluations >My Historical Evaluations for Others

- Self Service >Performance Management >Other's Development Documents >Historical Evaluations >My Historical Evaluations for Others

Note: These pages are all similar in appearance and usage; only the Performance Document History page is detailed here.

Image: <Performance or Development> Document History page

This example illustrates the fields and controls on the <Performance or Development> Document History page.

The <Performance or Development> Document History page and My Historical Evaluations for Others page look and function similarly.

Filter Criteria

Enter search criteria to limit which documents appear in the list.

Note: This page region appears only if you access the page from Manager Self-Service.

First Name and **Last Name**	Enter the first and last names of the employee whose documents you want to access.
Document Type and **Document Status**	Select the document type and status of documents you want to view.
Period Between	Enter a date range for which you want to view documents.

<Performance or Development> Documents

Completed documents that meet the selection criteria appear in this list. The information that appears —Name, Document Type, Document Status, Period Begin, Period End, Job Title, and Rating—assists you to identify the specific document you want to view. You can click the link to open the document for viewing.

Viewing Documents for Your Team

This topic lists the pages used to view documents for direct and indirect reports.

This transaction allows managers to view all current and prior performance documents (as well as development documents) for employees that currently report to their organizations regardless of whether they are the manager listed on the document.

Pages Used to View Documents for Your Team

Page Name	*Definition Name*	*Usage*
View-Only Documents Page	HR_DR_DIRECTREPORT	Select an employee whose documents you want to view. See Create <Performance or Development> Documents - Employee Selection Criteria Page
View <Performance or Development> Documents Page	EP_APPR_SELECT	View the document steps and statuses for the selected document in WorkCenter. From this page, you can click the View link wherever it appears to view details of the step. See Current <Performance or Development> Documents Page or <Performance or Development> Documents Page

Related Links
Accessing Documents

Viewing Approval Status

This topic discusses how to view approval status.

Pages Used to View Approval Status

Page Name	Definition Name	Usage
View Approval Status Summary Page	EP_APPRAISL_APPR_L	View a list of documents for which you are a participant in the approval process.
View Approval Status Detail Page	EP_APPRAISAL_EE	View approval status of a single document.

Related Links
Approving Documents

View Approval Status Summary Page

Use the View Approval Status Summary page (EP_APPRAISL_APPR_L) to view a list of documents for which you are a participant in the approval process.

Navigation

Manager Self Service > Performance Management > View Approval Status > View Approval Status Summary

Image: View Approval Status Summary page

This example illustrates the fields and controls on the View Approval Status Summary page.

Name   Click the link of the employee name to view the detail of the
                                                      corresponding transaction request.

View Approval Status Detail Page

Use the View Approval Status Detail page (EP_APPRAISAL_EE) to view approval status of a single
document.

Navigation

Select a name link on the View Approval Status Summary page.

Image: View Approval Status Detail page

This example illustrates the fields and controls on the View Approval Status Detail page.
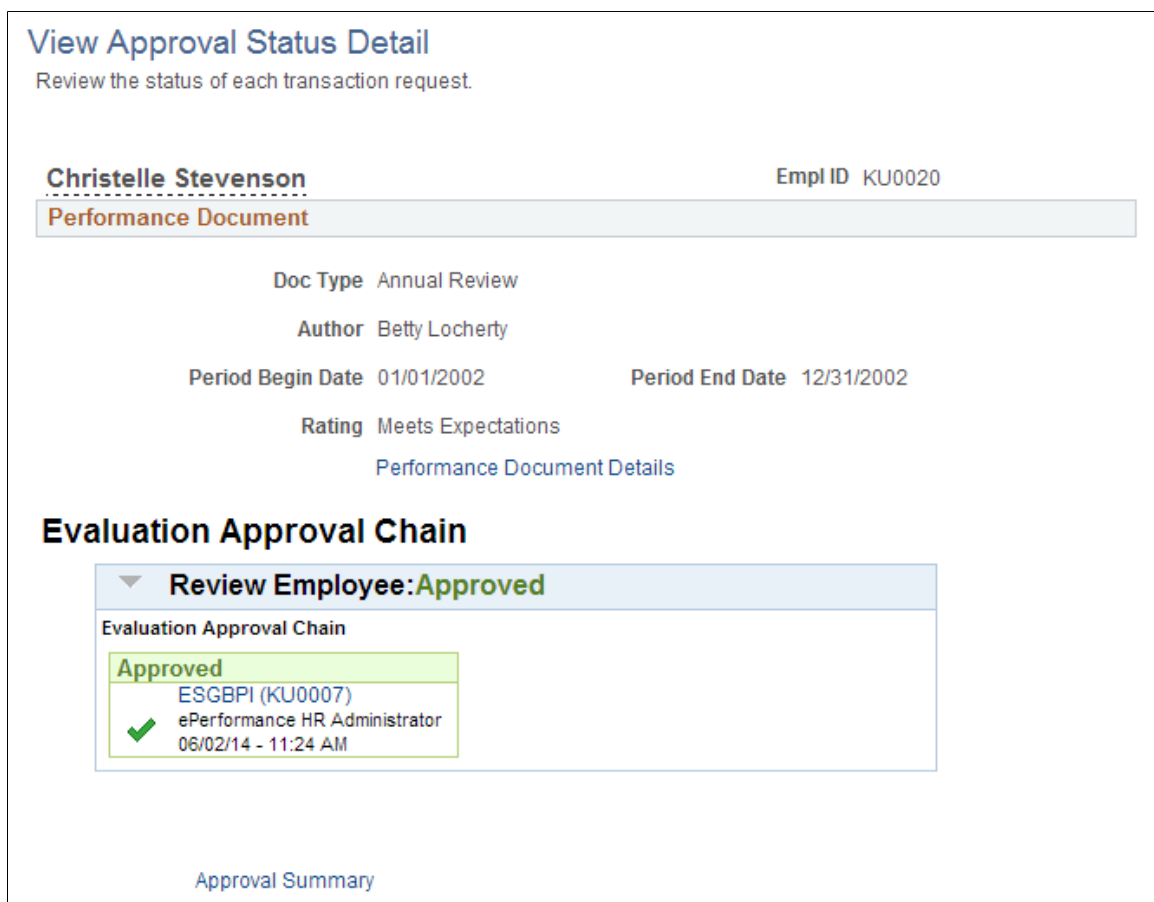
Performance Document Details   Click to view the corresponding performance document content
                                          in a modal window.

Evaluation Approval Chain   Displays the approval chain for the document. This control
                                          appears if the document has been approved.

Approval Summary   Click to return to the View Approval Status Summary page.

Defining Data for Inquiry Pages

This topic lists prerequisites and discusses how to define data for inquiry pages.

Pages Used to Define Data for Inquiry Pages

Page Name	Definition Name	Usage
Setup Rating Distribution Page	EP_DESIRED_DIST	Define the parameters for generating the Rating Distribution Summary report for a selected group of employees.
Create Summary Data Page	RUNCTL_EP_RPT_SNAP	Define the data collection that contains the documents against which inquiries are run. This is a prerequisite for using the Rating Distribution Summary and Status Summary inquiry pages.

Prerequisites

Before you run inquiries to produce reports and graphs, you must:

• Define rating distribution parameters.

   Before defining the parameters for the desired rating distribution, define the group for which to produce a ratings distribution report.

   ***

   Note: To obtain meaningful rating distribution information, you should use the same rating model and calculation method for all group members. Additionally, an employee should belong to only one group for which you define and evaluate a document result distribution. Therefore, it's important that you carefully define rating distribution groups and use the Group Member Overlap (GBP001) report to identify members with membership in more than one group.

   ***

• Run the Create Summary Data (EP_RPT_SNAP) process to build a collection of data for input to various inquiries and reports.

Related Links
"Understanding Group Build" (PeopleSoft HCM 9.2: Application Fundamentals)

Setup Rating Distribution Page

Use the Setup Rating Distribution page (EP_DESIRED_DIST) to define the parameters for generating the Rating Distribution Summary report for a selected group of employees.

Navigation

Workforce Development > Performance Management > Reports > Setup Rating Distribution > Setup Rating Distribution

Image: Setup Rating Distribution page

This example illustrates the fields and controls on the Setup Rating Distribution page.

The group for which you define the desired distribution parameters appears at the top of the page.

Review Rating Model

For the report to be meaningful, all group members for which you are defining parameters should share the same rating model and calculation method that you select in the following fields.

Document Type	Select the type of document for the desired distribution.
Rating Model	Select the rating model for the desired distribution.
Calc Method (calculation method)	Select the calculation method for the desired distribution. Options are: *Average, Revw Band* (review band), or *Sum* (summation).

Desired Rating Distribution

The desired rating distribution defines, for a given group of employees, the desired percentage of documents that should fall into each rating category or point spread. The selected calculation method determines which fields appear in this group box:

Review Rating	If the calculation method is average or review band, this field displays the document's qualitative ratings from the rating model table.
Description	If the calculation method is average or review band, the description of the qualitative rating appears. The descriptions come from the Rating Model table.
From Points and **To Points**	These fields appear if the calculation method is summation. Enter the beginning point value and ending point value for the

desired distribution. Enter point ranges sequentially; do not leave gaps or enter overlapping point ranges.

Desired Distribution   If the calculation method is summation, enter the percentage of employees that should receive the number of points that are defined by the From Points and To Points fields.

If the calculation method is average or review band, enter the percentage of employees that should receive the rating that is specified in the Document Rating field. Distribution percentages must add up to 100.

Examples

The following examples illustrate how the Desired Distribution field works with the From Points, To Points, and Review Rating fields:

- For five percent of the group members to receive a rating of 10 to 20 points, enter 10 in the From Points field, 20 in the To Points field, and 5 in the Desired Distribution field.

- For five percent of the group members to receive a review rating of O (outstanding), enter five percent in the Desired Distribution field that corresponds to the O rating.

Create Summary Data Page

Use the Create Summary Data page (RUNCTL_EP_RPT_SNAP) to define the data collection that contains the documents against which inquiries are run.

Navigation

Workforce Development >Performance Management >Reports >Create Summary Data

Image: Create Summary Data page

This example illustrates the fields and controls on the Create Summary Data page.

The Create Summary Data process builds the data collection that is used in the rating distribution and status inquiry pages. You must specify at least a Group ID and a Group As Of Date to run this process; other parameters are available to further refine the data collection.

This is a prerequisite for using the Rating Distribution Summary and Status Summary inquiry pages.

Group As of Date	The system summarizes data for employees belonging to the group defined in the Group ID field as of the date specified.
Document Type	Select a document type, such as quarterly, annual, or yearly. If you leave this field blank, the system selects all document types.
From Date and **To Date**	Enter the dates that define a date range for selecting documents to include in the report. These fields work in conjunction with the period basis selection.

Period Basis

Period Begin Date	Select to have the system retrieve data for documents that have a period begin date that falls between the dates that you enter in the From Date and To Date fields. The period begin date represents the first day of the period and is associated with a document when the document is first created.
Period End Date	Select to have the system retrieve data from documents that have a period end date that falls between the dates that you enter in the From Date and To Date field. The period end date represents the last day of the period and is associated with a document when the document is first created.

Group ID

Group ID	Enter the group ID that is associated with the employees for whom you want to generate the inquiry data. Group IDs are defined as part of the Group Build process in PeopleSoft HR.
	Note: When generating data for the status inquiry pages, Oracle recommends that group members share the same approval process option.

Viewing Ratings Summaries

This topic provides an overview on ratings distribution, lists prerequisites, and discusses how to:

• View rating distribution summaries.

• View rating distribution details.

Pages Used to View Ratings Summaries

Page Name	*Definition Name*	*Usage*
View Rating Summary Page	EP_DISTRIB_SUM	View the preliminary, actual, and desired rating distributions for a group of employees and document type.
Rating Distribution Detail Page	EP_DISTRIB_DTL	View details for employees that fall into the selected rating category or point spread on the rating distribution bar chart.

Understanding Ratings Distributions

The ratings distribution summary report is the most reliable if the documents for everyone in the ratings distribution group are no longer in the *In Progress* status, and that an overall summary rating was entered or calculated on all documents. Additionally, because the rating distribution reports include preliminary ratings, you should ensure that all preliminary ratings are entered.

Prerequisites

Before you can view a rating distribution summary you must:

• Define the desired rating distribution on the Setup Rating Distribution page.

• Build the data collection from which the rating distribution is generated on the Create Summary Data page.

View Rating Summary Page

Use the View Rating Summary page (EP_DISTRIB_SUM) to view the preliminary, actual, and desired rating distributions for a group of employees and document type.

Navigation

Workforce Development > Performance Management > Reports > View Rating Summary >View Rating Summary

Image: View Rating Summary page

This example illustrates the fields and controls on the View Rating Summary page.

Group ID	The group ID for the employees whose rating results appear on the page.
Rating Model	The rating model that is used to quantify and evaluate employee performance.
Calc Method calculation method)	The method that is used to calculate ratings. Values are: *Summary, Average,* and *Review Band.*

	Note: The document template defines the calculation method.
Last Updated	The date on which the document rating distribution data that appears on the page was last calculated.
	Note: To calculate the data, you must run the Create Summary Data process.
Total Prelim Rated Documents (total preliminary rated documents)	The total number of documents for which preliminary ratings were defined.
Total Final Rated Documents	The total number of documents with final rating results.

Bar Chart Data

The information that the bar chart represents depends on the method that is used to calculate the overall ratings:

* If the calculation method is *Average* or *Review Band*:

    * The vertical axis shows the percentage of completed documents.

    * The horizontal axis shows qualitative rating categories, for example: *Company Maker* or *Exceeds Expectations*.

* If the calculation method is *Summation*:

    * The vertical axis shows the percentage of documents that fall into each point range that is defined on the Desired Rating Distribution page.

    * The horizontal axis shows each from and to point range that is defined on the Desired Rating Distribution page.

For both calculation methods, the bar chart compares preliminary, actual, and desired results. Preliminary results come from the Preliminary Ratings page; actual ratings come from the Manager Evaluation page; desired results come from the Desired Rating Distribution Table page.

Click a preliminary or actual bar to access the Rating Distribution Details page, where you can view detailed information for the selected rating category or point spread.

Related Links
Defining Sections

Rating Distribution Detail Page

Use the Rating Distribution Detail page (EP_DISTRIB_DTL) to view details for employees that fall into the selected rating category or point spread on the rating distribution bar chart.

Navigation

Click a bar on the View Rating Summary page.

Image: Rating Distribution Detail page

This example illustrates the fields and controls on the Rating Distribution Detail page.

This page lists detailed information for the employees within the rating category or point spread that you selected on the Rating Distribution Summary page.

Calculation Method	The calculation method that is used to calculate the overall ratings. Values are *Average*, *Review Band*, and *Summation*.
Approval Status	The code for the approval status:

- *NREQ:* Not required

- *OPEN:* Not submitted

- *SUBM:* Submitted

- *APRV:* Approved

- *DENY:* Denied

Viewing Document Status Summaries

This topic provides an overview of status inquiry page access, lists a prerequisite, and discusses how to view document status summaries.

Pages Used to View Document Status Summaries

Page Name	Definition Name	Usage
View Status Summary Page	EP_STATUS_SUM_MGR	View a pie chart that shows the percentage of documents in each document status as a manager. Each wedge represents a document status.
View Status Summary Page	EP_STATUS_SUM	View a pie chart that shows the percentage of documents in each document status for the selected group as an administrator. Each wedge represents a document status.
Document Status Detail Page	EP_STATUS_DTL	View the list of employees that comprise the document status selected on the Document Status Summary page. Also see status details for each employee.

Understanding Status Inquiry Page Access

For the status inquiry pages, group members should share the same approval process option. The approval process option determines when, and if, documents approval is required. It also determines which statuses documents must pass through before they reach the *Complete* status.

To access the status inquiry pages as an administrator, enter either a group ID or a document type on the search page to select the employees whose document statuses you want to view. All members of the group should have the same document type. If more than one document template was used to generate the documents, and the review process options differ (for example, some documents hold a review and others do not), then it is possible that not every document that is selected for the report will go through the same set of statuses. As for managers who have access to view document status summary, their view is limited only to documents of their direct reports. So while they do need to specify the document type and period begin and end dates of the documents they want to look at in the chart (if no default values have been assigned), group ID is not applicable to them.

The inquiry pages always represent the correct percentage of documents in each status; however, if more than one review process option is represented, the pages might not give you a complete picture of the statuses through which documents must pass.

Prerequisite

Before you can use inquiry pages to view the status of documents, use the Create Summary Data page to create a snapshot of the data to be used by the inquiry page.
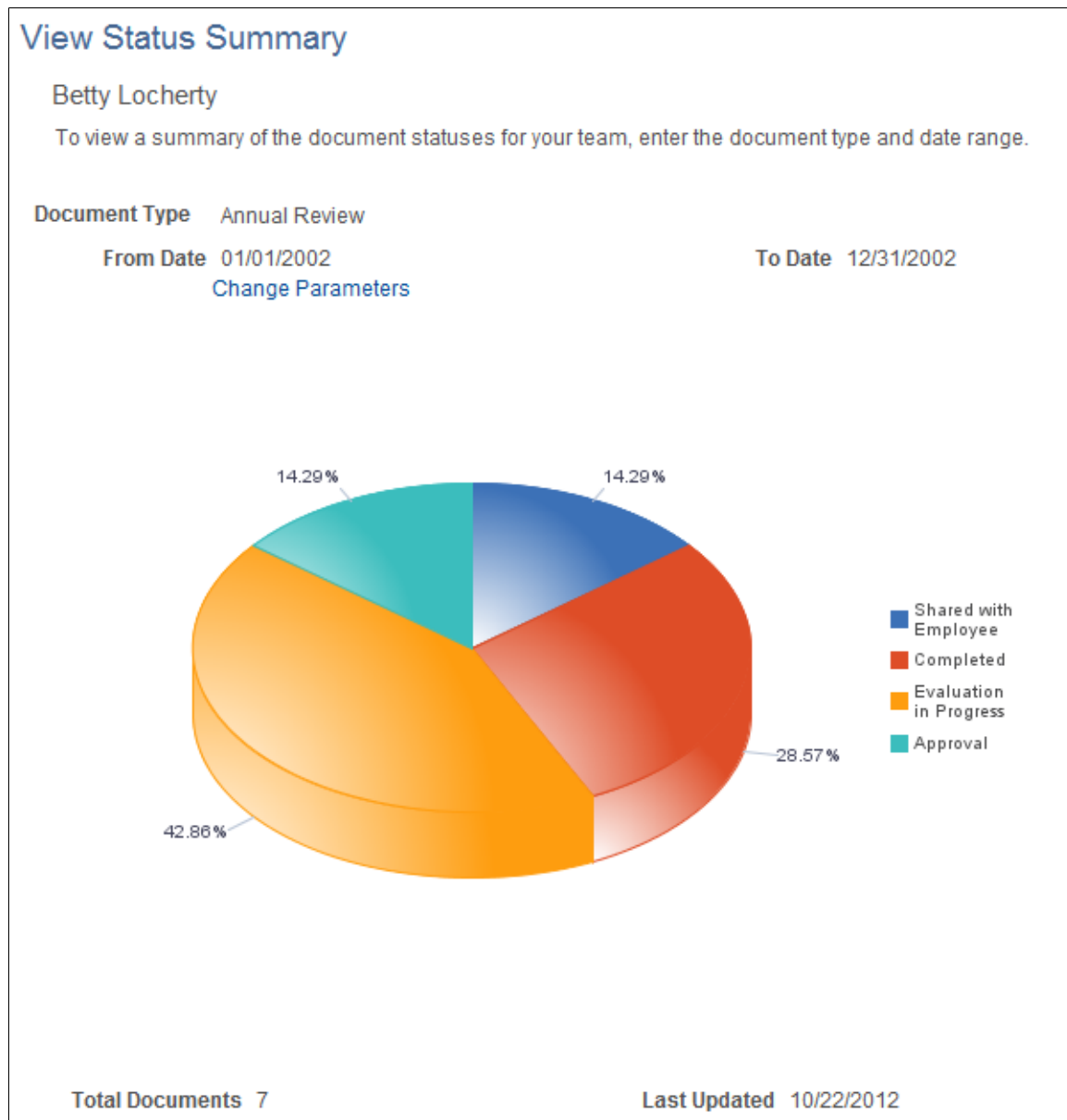
View Status Summary Page

Use the View Status Summary page (EP_STATUS_SUM_MGR) or the View Status Summary page (EP_STATUS_SUM) to view a pie chart that shows the percentage of documents in each document status as a manager or as an administrator.

Navigation

- Manager Self Service >Performance Management >View Status Summary >View Status Summary

- Workforce Development >Performance Management >Reports >View Status Summary >View Status Summary

Image: View Status Summary page

This example illustrates the fields and controls on the View Status Summary page.

When the user accesses this page for the first time, the system builds the status summary chart using the default values specified on the Assign Document Defaults page. If no default values are available, the Change Parameters page is displayed for the user to enter parameters that are used to create the chart.

This chart is also available as a pagelet. For more information, see Understanding Inquiry Pages.

Note: The same functionality is also available to administrators under Workforce Development >Performance Management >Reports >View Status Summary. Information shown on the administrator version of the page is slightly different than the manager's. Parameter defaulting is not available in the administrator version of the chart; the administrator needs to select a group ID and a document type for the status summary to be rendered. For the manager version of the chart, group ID is not applicable; only documents for the manager's direct reports that are matching the parameters are represented in the chart. Period basis is also not visible for managers.

Group ID	Displays the group ID for which the summary results are rendered. This field is available if the user accesses the page as an administrator.
Document Type	Displays the document type for which the summary results are rendered.
From Date and **To Date**	Displays the time period for which the summary results are rendered.
Change Parameters	Click to open the Change Parameters page to select different parameters used for the status summary page. When parameters are changed, the system kicks off the EP_RPT_MGR application engine process to reload the status summary chart that is viewable from Manager Self Service or the pagelet. Click the Use Default Settings button on the page if you want to use the default values (specified on the Assign Document Defaults page) to build the chart again. This feature is only available when the chart is accessed from Manager Self Service or the pagelet, and it is not applicable to the administrator version.
Total Documents	Displays the total number of documents for which summary results are available.
Last Updated	Displays the date when the document status summary data that appears on the page was last calculated. **Note:** To calculate the displayed data for the administrator version of the chart, you must run the Create Summary Data process. The EP_RPT_MGR AE process is responsible for building the chart that is accessible from Manager Self Service or the pagelet.

Pie Chart Data

For the selected group and document type, the pie chart displays the percentage of documents that are currently associated with each document status.

Click a wedge to access the Document Status Detail page, where you can see the list of employees with documents in the selected status.

See <u>Document Status Detail Page</u>.

Related Links
<u>Document Statuses during Review and Approval</u>

Document Status Detail Page

Use the Document Status Detail page (EP_STATUS_DTL) to view the list of employees that comprise the document status selected on the View Status Summary page.

Navigation

Click a wedge in the pie chart on the View Status Summary page.

Image: Document Status Detail page

This example illustrates the fields and controls on the Document Status Detail page.

This page displays the employee IDs, employee record numbers (for administrator only), employee names, period begin and end dates and the approval statuses (for administrator only) for the wedge you selected in the pie chart on the View Status Summary page.

Approval Status	The code for the approval status:

- *NREQ:* Not required

- *OPEN:* Not submitted

- *SUBM:* Submitted

- *APRV:* Approved

- *DENY:* Denied

This field is available to administrators only.

Viewing Detailed Calculations of Performance Results

This topic provides an overview of debug/trace logs, lists a prerequisite, and discusses how to view the debug or trace log.

Pages Used to View the Debug/Trace Log

Page Name	Definition Name	Usage
ePerformance Debug/Trace Log Page	EP_DEBUG	View the detailed calculations for a document so that you can debug or trace the calculation.
ePerformance Debug/Trace Log Page (printable version)	EP_DEBUG_PRNT	Display all calculation information on a single page for convenient printing.

Understanding Debug/Trace Logs

You can view a log of the steps that the system takes to calculate the results of a selected document. This feature can be helpful when you're trying to debug setup problems that are not easily identified by looking at the results of a document calculation.

The system generates a debug/trace log for a document when the user clicks a calculate button on the Maintain Documents page.

When a user first enters the Evaluation page, the system deletes any existing debug/trace information for the subdocument and begins a new trace. The document does not need to be saved to record the debug/trace results; clicking a calculate button automatically saves the results to the log.

Review the results of the debug/trace process after results are calculated and before accessing the Evaluation page for the same subdocument, since accessing the page again deletes the debug/trace data just created.

Prerequisite

To have the system log calculation entries, you must select the Debug Rating Calculations check box on the ePerformance page (Set Up HCM, Install, Product Specific, ePerformance Installation, ePerformance).

Warning! Enabling this feature can have a significant impact on system performance. We recommend that you use the feature only when you are testing and debugging the ePerformance setup.

Related Links
Defining System Settings

ePerformance Debug/Trace Log Page

Use the ePerformance Debug/Trace Log page (EP_DEBUG) to view the detailed calculations for a document so that you can debug or trace the calculation.

Navigation

Workforce Development >Performance Management >Calculation Debug/Trace Result >ePerformance Debug/Trace Log

Image: ePerformance Debug/Trace Log page

This example illustrates the fields and controls on the ePerformance Debug/Trace Log page.

Note: To access this page you must select the Debug Rating Calculations check box on the ePerformance page (Set Up HCM, Install, Product Specific, ePerformance Installation, ePerformance) and then perform a calculation on a Manager Evaluation page.

Log Entry Type	Select a log entry type to filter the output. Options are:
	• *Trace:*
	Only those entries that show the steps performed in the calculation appear.
	• *Informational:*
	Informational entries only appear. For example, an information entry is created when the system attempts to calculate a section for which none of the subordinate items have been rated. Information entries help explain why a particular result is obtained from a calculation.
	• *Error:*
	Errors appear in red and generally indicate a setup problem.
	• *Warning.*
Send to PeopleSoft	Click to access the Launch Diagnostics page (PT_DIAG_PLUGIN) and send the diagnostics information to Oracle.

For more information on the delivered HCM application diagnostic plug-in for ePerformance, see"ePerformance" (PeopleSoft HCM 9.2: Application Fundamentals)

Printable Version   Click to render a page that presents all trace information, without tabs, so that you can print a copy.

Note: When using the browser's File, Print option to print this page, be sure to set the printer layout to landscape mode.

Step Detail Tab

Click this tab to view the rating model, calculation method, review rating, numeric rating, review points, and the trace/debug messages for the employee.

ePerformance Debug/Trace Log Page (printable version)

Use the ePerformance Debug/Trace Log (printable version) page (EP_DEBUG_PRNT) to display all calculation information on a single page for convenient printing.

Navigation

Click the Printable Version link on the ePerformance Debug/Trace Log page.

Image: ePerformance Debug/Trace Log page (printable version)

This example illustrates the fields and controls on the ePerformance Debug/Trace Log page (printable version).

Appendix A

Archiving Performance and Development Documents

Understanding Document Archiving

This topic discusses:

- Document archiving.

- Delivered archive objects.

- Running the archive process.

- Deleting archived rows.

Related Links
"Managing the Data Archive Manager" (PeopleSoft HCM 9.2: Global Payroll)

Document Archiving

Over the years the number of documents within your organization is likely to grow to an unmanageable number. To help alleviate this problem, PeopleSoft provides a method to archive and delete performance and development documents by country and document type when the document is older than a specified date.

Delivered Archive Objects

ePerformance delivers these archive objects:

- EP_APPR_DOCS

- EP_APPR_DOCS_FPA

ePerformance also delivers the EP_APPR template.

This table lists the archiving records that are delivered for the EP_APPR_DOCS archive object:

Description	Archiving Record	History Record
Document Header	EP_APPR	EP_APPR_HST
Document Item - Baseline	EP_APPR_B_ITEM	EP_A_B_ITEM_HST
Document Role - Baseline	EP_APPR_B_ROLE	EP_A_B_ROLE_HST

Description	Archiving Record	History Record
Document Section - Baseline	EP_APPR_B_SEC	EP_A_B_SEC_HST
Document Sub-Item - Baseline	EP_APPR_B_SUB	EP_A_B_SUB_HST
Checkpoint Header table	EP_APPR_C	EP_APPR_C_HST
Track Progress Checkpoints	EP_APPR_CHECKPT	EP_A_CHKPT_HST
Checkpoint Item table	EP_APPR_C_ITEM	EP_A_C_ITEM_HST
Checkpoint Section table	EP_APPR_C_SEC	EP_A_C_SEC_HST
Checkpoint Subitem table	EP_APPR_C_SUB	EP_A_C_SUB_HST
Document Item	EP_APPR_ITEM	EP_A_ITEM_HST
Nominate Participants	EP_APPR_NOMINEE	EP_A_NOMINE_HST
Building Rvw Participant List	EP_APPR_NOM_LST	EP_A_NM_LST_HST
Document Participants	EP_APPR_PARTIC	EP_A_PARTIC_HST
Document Role	EP_APPR_ROLE	EP_A_ROLE_HST
Document Section	EP_APPR_SECTION	EP_A_SECTN_HST
Wkflow for Appraisal SS	EP_APPR_STA	EP_A_STA_HST
Document Sub-Item	EP_APPR_SUBITEM	EP_A_SBITM_HST
ePerformance Attachments	EP_ATTACH	EP_ATTACH_HST
Federal Review Comments	GVT_EP_COMMENTS	GVT_EP_CMNT_HST

This table lists the archiving records that are delivered for the EP_APPR_DOCS_FPA archive object:

Description	Archiving Record	History Record
FPS - Employee Review History	FPAREVIEW_HIST	FPARVW_HIST_HST

Running the Archive Process

To archive ePerformance documents, follow these steps:

1. Access the Archive Data to History page (PeopleTools > Data Archive Manager > Archive Data to History).

2. Create a run control ID.

3. Select *EP_APPR* (ePerformance Docs Archive) as the Archive Template.

4. For archiving by country, document type, and date, choose *Selection* as the Process Type.

5. Select one of the these values:

    •   *EP_APPR_AR_CNTY_DCIND_DT* (Archive by Cntry, Doc Ind, Dt).

    •   *EP_APPR_AR_CNTY_DCTYP_DT* (Archive by Cntry, Doc Typ, Dt).

    •   *EP_APPR_AR_CNTY_DT* (Archive by Cntry, Dt).

    •   *EP_APPR_AR_DATE* (Archive by Date)

    •   *EP_APPR_AR_DCTYP_DT* (Archive by Doc Typ, Dt)

    •   *EP_APPR_AR_EMPLID_DT* (Archive by Emp Id, Dt)

6. If you are using an Oracle database, select Row Based Processing and then enter a number (usually 10000) in the Commit Frequency field.

    Note: Selecting Row Based Processing is not required for any other platform other than Oracle.

7. Click the Define Binds link.

8. Click the Reset Query Bind Variables button.

9. Enter the appropriate information in these fields:

    •   Country

    •   Document Type

    •   Document end date less than

        The system archives into the History tables documents that are older than the date you entered.

10. Run the process.

Deleting Archived Rows

To delete archived ePerformance documents, follow these steps:

1. Access the Archive Data to History page (PeopleTools > Data Archive Manager > Archive Data to History).

2. Create a run control ID.

3. Select *EP_APPR* (ePerformance Docs Archive) as the Archive Template.

4. To delete old documents, choose *Delete* as the Process Type.

5. From the Batch Number field, select the batch number that was assigned to the archive process.

6. If you are using an Oracle database, select Row Based Processing and then enter a number (usually 10000) in the Commit Frequency field.

> **Note:** Rows have to be in the History tables to be deleted from Transaction tables.

7. Select the Audit Row Count check box.

8. Run the process.

> **Note:** If you need to restore rows from History tables back to Transaction tables, select *Rollback* as the process type and then select the query that meets your needs. You also need to reset the query bind variable fields (Country, Document Type, Doc end date greater than, and Doc end date less than).

Appendix B

Delivered Workflow for ePerformance

Delivered Workflow for ePerformance

This section discusses ePerformance workflow. The workflows are listed alphabetically by workflow name.

Related Links

Modifying Self-Service Pages and Email Notifications

ePerformance Notification Events

This section discusses the ePerformance notification workflow.

Description

ePerformance Notification Event	Description
Event Description	When employees and managers use ePerformance to create evaluations, this generic notification event is used to support email notifications that are sent to the appropriate participant.
Action Description	In ePerformance, workflow notification is configurable at each point in the evaluation process. Available email notifications are sent to inform the appropriate persons of: the availability of evaluations for viewing and update; a change in the status of documents; a request for review and approval of evaluation criteria, participant nominations, or evaluations; invitations to participate in evaluations; and acceptance or declination of invitations.
Notification Method	email

Appendix C

Delivered Roles and Permission Lists for ePerformance

Delivered Roles and Permission Lists

This topic provides summary information about the delivered roles and permission lists for PeopleSoft ePerformance. Roles and permission lists are part of standard PeopleTools security administration, used to grant access to components and pages. Roles and permission lists are discussed in the *PeopleTools: Security Administration* documentation.

Note: There are other roles and permission lists delivered for ePerformance but are not no longer used. The ones listed in this topic are all the ones that are used to support current ePerformance features and functionality.

Delivered ePerformance Roles

This table lists the roles that are delivered for ePerformance:

Role	Description
ePerformance Employee	This role generally corresponds to all employees who participate in the performance review process (either as the subject of a review, or a peer reviewer). It has permission to all tasks related to the review process, for example: 1. Create documents. 2. Update documents they own.
ePerformance Employee Fluid	This role provides employees access to the *fluid* employe self service functionality that is available through the Performance tile.

Role	Description
ePerformance HR Admin	This role is responsible for defining and maintaining ePerformance Management templates, in addition to performing day-to-day administration of the review process. For example, the ePerformance HR Admin role may be required to transfer ownership of reviews from terminated managers. Users of this role oversee the review process, and have the permission to: 1. Create documents. 2. View documents. 3. Reopen, transfer, cancel, delete, and approve documents. 4. Define document templates. 5. Perform calendar setup.
ePerformance Manager	This role is assigned to managers who conduct performance reviews, or otherwise "own" an employee's performance review. Uses of this role have the permission to: 1. Create documents. 2. Update their team's documents. 3. Reopen, transfer, cancel, and delete documents for their teams. 4. Approve documents.
ePerformance Manager Fluid	This role provides managers access to the *fluid* manager self service functionality that is available through the Team Performance and Team Performance Status tiles.

Role	Description
ePerformance Setup	This role is responsible for configuring and maintaining all of the ePerformance Management setup tables, for example: 1. Installation table 2. Text catalog 3. Document type definition 4. Template definition 5. Section definition 6. Calendar setup 7. Role setup 8. Writing tools setup (for example, language checker, development tips, and results writer) 9. Rating model definition 10. Alert setup

Delivered Permission Lists

Oracle delivers a list of permission lists for ePerformance.

This table lists the delivered permission lists for use in ePerformance functionality overall, and roles that are associated with each list:

Permission List	Description	Role
HCCPSS1350	ePerformance - Employee	ePerformance Employee
HCCPEP2200	ePerformance - HR Admin	ePerformance HR Admin
HCCPSS2150	ePerformance - Manager	ePerformance Manager
HCCPEP1000	ePerformance - Setup	ePerformance Setup

This table lists the delivered permission lists for use in *fluid* ePerformance functionality, and roles that are associated with each list:

Permission List	Description	Role
HCCPSS1360	ePerformance Employee Fluid	ePerformance Employee Fluid
HCCPSS2160	ePerformance Manager Fluid	ePerformance Manager Fluid

This table lists the delivered permission lists for ePerformance component interfaces:

Permission List	Description
HCCISS1350	ePerformance - Empl-Comp Intfc Component Interface for employee – used only by French Public Sector.
HCCIEP1000	ePerformance Setup-Comp Intfc Component Interface for Admin – for access to upload calendar and writing tools data.
HCCIEP2200	ePerf HR Admin-Comp Intfc Component Interface for Admin notifications and access to upload calendar data.

Appendix D

Integrating with PeopleSoft Enterprise Learning Management

Integrating with Enterprise Learning Management

ePerformance uses the Integration Broker to facilitate communication between the ePerformance and Enterprise Learning Management systems. Use the following steps to set up the integration between two systems.

Note: These steps assume that both systems are operating on the same PeopleTools version.

1. Ping the local gateway in both HCM and ELM systems.

   From the HCM system:

   a. Navigate to PeopleTools >Integration Broker >Configuration >Gateways.

   b. Search for the gateway that has the Local Gateway check box selected.

   c. Click the Ping Gateway button. Verify that the ping request was successful; the gateway status is active.

   Repeat the above substeps in the ELM system. Make sure that the gateway can be pinged successfully.

2. Verify that the target location for service configuration is set up in both HCM and ELM systems.

   From the HCM system:

   a. Navigate to PeopleTools >Integration Broker >Configuration >Service Configuration.

   b. Click the Setup Target Locations link. Verify that information is entered in the Target Location field of the Web Services Target Locations section.

   Repeat the above substeps in the ELM system.

3. Update the HCM and ELM node properties and ping the nodes in both systems.

   From the HCM system:

   a. Navigate to PeopleTools >Integration Broker >Integration Setup >Nodes.

   b. Search for the HR node. It needs to be the default local node.

   c. On the Node Definitions page that appears, click the Properties link. Add a row using this information and save the change:

   Name Type   Category

Property Name	SOA_ENABLED
	(Enter this property name manually)
Value	True

d.   Access the Connectors page. Click the Ping Node button and verify that the ping request was successful.

e.   Return to the search page to look for the ELM node. In this example, *PSFT_LM* (description: PS ELM - Local Node) is used. Access the Node Definitions page and click the Properties link, Add a row using this information and save the change:

Name Type	Category
Property Name	SOA_ENABLED
	(Enter this property name manually)
Value	True

f.   Access the Connectors page. Click the Ping Node button and verify that the ping request was successful.

From the ELM system:

Repeat the above substeps. Search for the ELM node (the default local node), add a new property and ping the node. Next, search for the HR node (for example, *PSFT_HR*, add a new property and ping the node.

4.   Add routings to HMCR_SYNCH_PORT and ensure the service operation is active in both HCM and ELM systems.

From the HCM system:

a.   Navigate to PeopleTools >Integration Broker >Integration Setup >Service Operations

b.   Search for and open the HMCR_SYNCH_PORT service operation.

c.   On the General page that appears, select the Active check box to activate the service operation.

d.   Access the Routings page. Enter *HMCR_IS2* in the Routing Name field and click the Add button.

On the Routing Definitions page that appears, enter this information:

Description	HMCR_IS2
Active	<select this check box>
Comments	Inbound Synchronous
Sender Node	<the ELM node you updated earlier>
Receiver Node	<the HR node you updated earlier>

Owner ID	HCM Service Framework

Save the change. Click the Return button.

e. Add a new routing on the Routings page. Enter *HMCR_OS2* in the Routing Name field and click the Add button.

On the Routing Definitions page that appears, enter this information:

Description	HMCR_OS2
Active	<select this check box>
Comments	Outbound Synchronous
Sender Node	<the HR node you updated earlier>
Receiver Node	<the ELM node you updated earlier>
Owner ID	HCM Service Framework

Save the change. Click the Return button.

From the ELM system:

a. Navigate to PeopleTools >Integration Broker >Integration Setup >Service Operations

b. Search for and open the HMCR_SYNCH_PORT service operation.

c. On the General page that appears, select the Active check box to activate the service operation.

d. Access the Routings page. Enter *HMCR_IS2* in the Routing Name field and click the Add button.

On the Routing Definitions page that appears, enter this information:

Description	HMCR_IS2
Active	<select this check box>
Comments	Inbound Synchronous
Sender Node	<the HR node>
Receiver Node	<the ELM node>
Owner ID	HCM Service Framework

e. Add a new routing on the Routings page. Enter *HMCR_OS2* in the Routing Name field and click the Add button.

On the Routing Definitions page that appears, enter this information:

Description	HMCR_OS2
Active	<select this check box>

Comments	Outbound Synchronous
Sender Node	\<the ELM node\>
Receiver Node	\<the HR node\>
Owner ID	HCM Service Framework

5. Verify that the domain status is *Active* in both HCM and ELM systems.

   From the HCM system:

   a. Navigate to PeopleTools >Integration Broker >Service Operations Monitor >Administration >Domain Status.

   b. On the Domain Status page that appears, select *Active* in the Domain Status field and click the Refresh button. If the current status is *Inactive*, change it to *Active* and click the Update button.

   Repeat the above substeps in the ELM system.

6. Verify the trusted node.

   From the HCM system:

   a. Navigate to PeopleTools >Security >Security Objects >Single Signon.

   b. On the Single Signon page that appears, verify that the ELM node exists in the Trust Authentication Tokens issued by these Nodes section. Add it to the section manually if it is not already displayed.

   Access the same page in the ELM system. Verify that the HR node exists in the Trust Authentication Tokens issued by these Nodes section. Add it to the section manually if it is not already displayed.

7. Verify the ELM portal node URL configuration in the HCM system.

   a. Navigate to PeopleTools >Portal >Node Definitions.

   b. On the Node Definitions page that appears, access the Portal page. Make sure that information is entered in these fields:

Content URI Text	http://\<webserver machine name\>:\<Port\>/psc/\<pshome or instance name\>
Portal URI Text	http://\<webserver machine name\>:\<Port\>/psp/\<pshome or instance name\>

8. Change all of Learning CREFs node from *ELM* (default value) to the ELM local node name you updated earlier in the HCM system.

   a. Navigate to PeopleTools >Portal >Structure and Content.

   b. On the Structure and Content page that appears, click the Workforce Development link.

   On the next screen of the page, click the Performance Management link.

On the next screen of the page, click the ELM Learning link.

Image: Structure and Content page

This example displays the Structure and Content page.

(Perform this task on all entries listed in the Content References section) Click the Edit link and change the current node name to your actual ELM node in the URL Information section on the Content Ref Administration page. Save the change.

9. Verify that the permission list setup is correct for the HMCR_SYNCH_PORT service operation in both HCM and ELM systems.

    From the HCM system:

    a. Navigate to Integration Broker >Integration Setup >Service Operations.

        Search for and open the HMCR_SYNCH_PORT service operation.

    b. On the General page that appears, click the Service Operation Security link.

        Make sure that the PTPT1000 permission list is listed. Add it when necessary.

    Repeat the above substeps in the ELM system.

10. Refresh service registry in both HCM and ELM systems, and make sure there are no errors.

    a. Navigate to Set Up HCM >System Administration >HCM Registry >Service Registry.

    b.   On the Service Registry page that appears, click the Refresh Cache button. Verify that there are no errors.

Repeat the above substeps in the ELM system. The navigation path is Set Up ELM >System Administration >Service Registry.

11. Verify the access type in the HCM system.

Note: This step is technically not part of the integration step; this is done to make sure that the documents can show up properly.

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    a.   Navigate to Set Up HCM >Common Definitions >Direct Reports for Managers >Configure Direct Reports UI.

    b.   (Perform this step on these component entries: EP_APPR_SELECT, EP_CREATE_MY_DVL and EP_CREATE_MY_PRF) Click the Configure button to open the Direct Reports Configuration page. On this page, make sure that the selected access type is *By Part Posn Mgmt Supervisor*.

Appendix E

ePerformance Reports

ePerformance Reports: A to Z

The table in this topic lists the PeopleSoft ePerformance reports, sorted by report ID.

For more information about running these reports, refer to:

* The corresponding topic in this product documentation.

* *PeopleTools: Process Scheduler*

* *PeopleTools: BI Publisher for PeopleSoft*

* *PeopleTools: SQR Language Reference for PeopleSoft*

For samples of these reports, see the Report Samples that are published with your online documentation.

Report ID and Report Name	*Description*	*Navigation*	*Run Control Page*
HEP001 Missing Documents	Create a list of missing documents for a group of employees and a given document type and date range. **Note:** A document is reported as missing if it is not created by the mass review creation process or directly by a manager for the date range and document type specified (the report ignores former employees.	Workforce Development > Performance Management > Reports >Missing Documents Report	RUNCTL_EP_RPT
HEP002 Late Documents	Create a list of late documents for a group of employees and a given document type. **Note:** To determine whether a document is late, the system looks at the document due date and compares this date to the current date. If the current date is greater than the due date, and the status of the document is not yet complete, the document is reported as late (the report ignores documents that are canceled).	Workforce Development > Performance Management > Reports > Late Documents Report > Late Documents	RUNCTL_EP_RPT