
PeopleSoft HCM 9.2: PeopleSoft 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.

Hosted PeopleSoft Online Help

You can access the hosted PeopleSoft Online Help on the [Oracle Help Center](#). The hosted PeopleSoft 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. The hosted PeopleSoft Online Help is available in English only.

To configure the context-sensitive help for your PeopleSoft applications to use the Oracle Help Center, see [Configuring Context-Sensitive Help Using the Hosted Online Help Website](#).

Locally Installed PeopleSoft Online Help

If you're setting up an on-premises PeopleSoft environment, and your organization has firewall restrictions that prevent you from using the hosted PeopleSoft Online Help, you can install the online help locally. Installable PeopleSoft Online Help is made available with selected PeopleSoft Update Images and with PeopleTools releases for on-premises installations, through the [Oracle Software Delivery Cloud](#).

Your installation documentation includes a chapter with instructions for how to install the online help for your business environment, and the documentation zip file may contain a README.txt file with additional installation instructions. See *PeopleSoft 9.2 Application Installation* for your database platform, "Installing PeopleSoft Online Help."

To configure the context-sensitive help for your PeopleSoft applications to use a locally installed online help website, see [Configuring Context-Sensitive Help Using a Locally Installed Online Help Website](#).

Downloadable PeopleBook PDF Files

You can access downloadable PDF versions of the help content in the traditional PeopleBook format on the [Oracle Help Center](#). 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.

<i>Typographical Convention</i>	<i>Description</i>
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.
& (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.

<i>Typographical Convention</i>	<i>Description</i>
⇒	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

Select About This Help in the left navigation panel on any page in the PeopleSoft Online Help to see information on the following topics:

- Using the PeopleSoft Online Help.
- Managing hosted Online Help.
- Managing locally installed PeopleSoft Online Help.

PeopleSoft HCM Related Links

[Oracle Help Center](#)

[PeopleSoft Online Help Home](#)

[PeopleSoft Information Portal](#)

[My Oracle Support](#)

[PeopleSoft Training from Oracle University](#)

[PeopleSoft Video Feature Overviews on YouTube](#)

[PeopleSoft Business Process Maps \(Microsoft Visio format\)](#)

[“HCM Abbreviations” \(Application Fundamentals\)](#)

[PeopleSoft Spotlight Series](#)

Contact Us

Send your suggestions to pssoft-infodev_us@oracle.com.

Please include the applications update image or PeopleTools release that you’re using.

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	<u>Read PeopleSoft Blogs</u>
	<u>Connect with PeopleSoft on LinkedIn</u>

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.

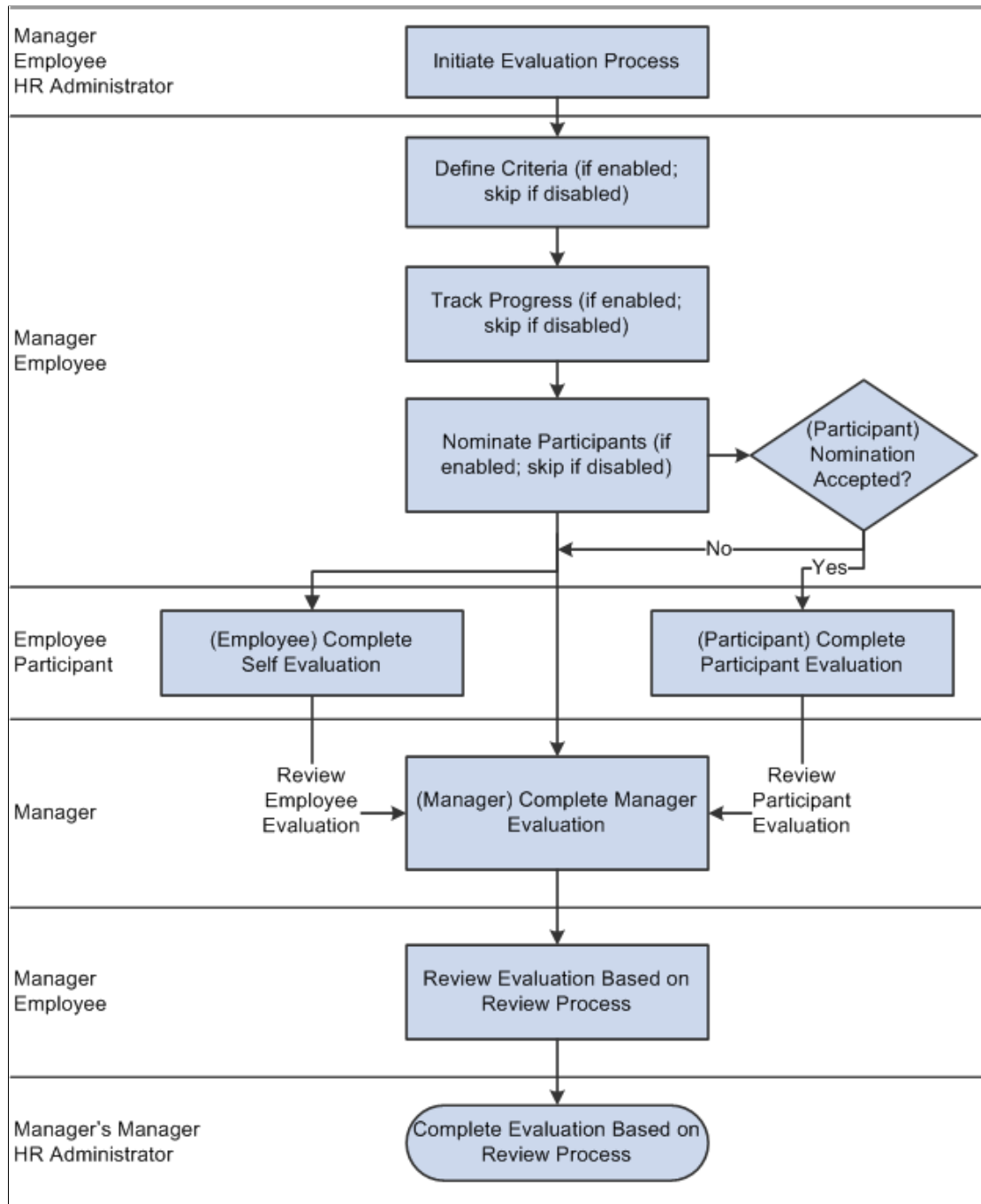
ePerformance provides you with the flexibility to establish evaluations for different purposes by setting up document templates that define evaluation processes. With this application, you can:

- Generate evaluations.
- Define evaluation criteria.
- Introduce mid-period checkpoints to track employee progress.
- Invite participants to provide feedback and manage participant reviews.
- 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.

Video: [New ePerformance Features in HCM 9.2](#)

ePerformance Business Processes

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](#)

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](#)) article on My Oracle Support 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.

Pages Used to Define System Settings

<i>Page Name</i>	<i>Definition Name</i>	<i>Usage</i>
<u>ePerformance Installation - ePerformance Page</u>	EP_INSTALLATION	Define system settings for ePerformance.
<u>ePerformance Installation - Objective Pages Page</u>	EP_INSTALL_OBJ	Configure system settings and email notification setup for business objectives.
<u>Fluid Popup Menu Setup Page</u>	EP_PMENU_SETUP	Configure actions for the More Actions menu in Fluid ePerformance.

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.
- Email notifications for ePerformance process steps that occur.

Note: Oracle PeopleSoft delivers Notification Composer Framework to manage the setup and administration of all notifications in one central location.

Once you have adopted the Notification Composer feature, you must use it to create new notifications and manage your existing notifications.

Notifications delivered with HCM Image 47 or later must use Notification Composer.

For more information about Notification Composer Framework, see “Understanding Notification Composer” (Enterprise Components).

See [ePerformance Installation - ePerformance Page](#).

Understanding Fluid System Settings

The **More Actions** icon appears in multiple locations of documents in Fluid.

When selected, it opens a popup menu to provide relevant actions to the part of the page that you are working on. For example, select the **More Actions** menu from a document’s section to see the actions that you can perform in that section, such as reordering items, copy items from another document, and defining item weights.

The setup on the [Fluid Popup Menu Setup Page](#) determines the actions supported in each placement of the **More Actions** icon. Some of these actions may not be available to users based on their role access in the template setup.

See Also

(Fluid ePerformance) [Understanding the More Actions menu](#)

(Fluid Business Objectives) [Understanding the More Actions Menu](#)

ePerformance Installation - ePerformance Page

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

Navigation:

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

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

ePerformance Installation

ePerformance

Objective Pages

Last Document ID

1418

Debug Options

☐ Debug Rating Calculations

☐ Allow Language Override
 ☐ Enable Rich Text in Modal only

☐ PS Audit Enabled
 ☐ Don't reposition document on Save

☐ Enable AutoSave

Configure Notifications

Document Creation

☒ Document was created by HR (Recipient is Manager or Employee)
 ☒ Document was created by Manager or Employee (Recipient is Manager or Employee)

Define Criteria & Track Progress

☒ Employee add/updates an item (Recipient is Manager)
 ☒ Manager add/updates an item (Recipient is Employee)
 ☒ Define Criteria was approved (Recipient is Manager or Employee)
 ☒ Define Criteria was reopened (Recipient is Manager and/or Employee)
 ☒ Checkpoint comments were shared (Recipient is Manager or Employee)
 ☒ Manager Completes Checkpoint (Recipient is Employee)
 ☒ Manager Skips Checkpoint (Recipient is Employee)
 ☒ Finalize Criteria was completed (Recipient is Manager or Employee)
 ☒ Finalized Criteria was reopened (Recipient is Manager and/or Employee)
 ☒ Checkpoint was reopened (Recipient is Manager and/or Employee)

This example illustrates the fields and controls on the ePerformance Installation - 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 ☒ Document Status was advanced

This example illustrates the fields and controls on the ePerformance Installation - 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 Employee Document on Termination [?]

☐ Cancel Document on Termination

Configure Due Date Notifications [?]

☒ Enable Due Date Notifications

Alert Details

Alert Type	Number of Days before Due Date
Courtesy Reminder	0
Warning Reminder	0
Critical Reminder	0

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

Notification Details

Due Date Type	Send Courtesy Reminder	Send Warning Reminder	Send Critical Reminder
Approve Criteria	☐	☐	☐
Checkpoint Due	☐	☐	☐
Finalize Criteria	☐	☐	☐
Nomination Due	☐	☐	☐
Evaluation Due	☐	☐	☐

Notification Schedule not yet created.

Configure Automatic Transfers

On Manager Termination [?]

☒ Enable on Manager Termination

☒ All Document Types
 ☐ Selected Document Types

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

On Change Employee Manager ⓘ

☒ Enable on Change Employee Manager

☒ All Document Types

Document Type Options

Days to Period End Date
☐ Add Manager as Reviewer
☐ Transfer Past Period End Date

☐ Selected Document Types

Access Type used for Transfers By Part Posn Mgmt Supervisor ▾

Configure Rich Text Editor for Fluid ⓘ

*Display RTE in Fluid Use Rich Text Edit ▾

Configure Document Progression

☒ Allow Administrator to Advance Document

Field or Control	Description
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.

Field or Control	Description
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 <i>PeopleTools: Application Designer Developer's Guide</i>.
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. Note: The AutoSave feature is currently not supported in Fluid ePerformance. 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.

Field or Control	Description
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. Note: This option does not apply to Fluid ePerformance.
Don't reposition document on Save	Select this check box for the page to remain in the same position and not return to the top when documents are saved. Clear this check box for the system to reposition to the top of the page when documents are saved. By default, this option is cleared.

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 [\(Classic\) Accessing Documents](#).

Microsoft Outlook Integration

This integration is no longer supported.

Cancel Employee Document on Termination

Field or Control	Description
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

Field or Control	Description
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 <i>Courtesy Reminder</i> , <i>Warning Reminder</i> , and <i>Critical Reminder</i> .
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.

Field or Control	Description
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 <i>Evaluation In Progress</i> 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 - On Manager Termination

Field or Control	Description
Enable on Manager Termination	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
All Document Types	Select for the process to transfer in progress documents of all document types for terminated managers.

Field or Control	Description
Selected Document Types and Document Type	Select for the process to transfer in progress documents that are associated with specific document types. When selected, add the document types in the Document Types section.

Configure Automatic Transfers - On Change Employee Manager

Field or Control	Description
Enable on Change Employee Manager	Click to activate the Automatic Document Transfer feature that, upon changes in employee managers, automatically transfers in progress documents from current to new managers. See Also Understanding Automatic Document Transfer
All Document Types	Select for the process to transfer in progress documents of all document types in case of employee manager change.
Selected Document Types and Document Type	Select for the process to transfer in progress documents that are associated with specific document types. When selected, add the document types in the Document Types section.
Days to Period End Date	Enter the number of days until the document end date when documents are eligible for automatic transfer as a result of an employee manager change. If the current date of when the manager change occurs (for example, October 1) is <i>greater than</i> the number of the days (for example, 30 days) before the end date of a document (for example, December 31), the document is transferred automatically to the new manager. If the current date is <i>equal to</i> or <i>less than</i> the number of days specified in this field prior to the period end date, the document is not transferred automatically and stays with the current manager. This option becomes editable when the Enable on Change Employee Manager field is selected.

Field or Control	Description
Add Manager as Reviewer	Select to add current managers as peer reviewers when documents are transferred to new managers. The system adds current managers as nominees in respective documents, and they need to accept the evaluation requests on the Evaluations of Others Page to provide review feedback. This option becomes editable when the Enable on Change Employee Manager field is selected. Note: The Add Manager as Reviewer option is only applicable to documents created from templates that include <i>Previous Manager</i> as a participant role in the Evaluations section on the Template Definition - General Page. Be sure to include the correct participant role to templates to leverage this functionality. Without proper template setup, the system will not add managers to documents as reviewers even if the option is enabled, and the information will not be available on the Document Transfer Status page for administrators to review.
Transfer Past Period End Date	Select to automatically transfer documents as a result of an employee manager change when the change occurs <i>after</i> the period end date. Clear this option for documents to not transfer automatically and stay with current managers. This option becomes editable when the Enable on Change Employee Manager field is selected.
Access Type used for Transfers	Select the access type that the Direct Reports functionality uses to identify the next-level-up (in case of manager termination) or new (in case of employee manager change) manager for each document in the automatic transfer. Values are: <i>By Department Manager ID</i> <i>By Part Posn Mgmt Dept Mgr ID</i> <i>By Part Posn Mgmt Supervisor</i> <i>By Reports To Position</i> <i>By Supervisor ID</i> For more information about access types, see “Understanding Direct Reports Functionality” (Application Fundamentals).

Configure Rich Text Editor for Fluid

<i>Field or Control</i>	<i>Description</i>
Display RTE in Fluid (display rich text edit in fluid)	Select <i>Long Edit Box Only</i> to use plain text for fields such as comments and other long fields. Rich text formatting is not supported. Select <i>Use Rich Text Edit</i> to support rich text formatting for fields such as comments and other long fields. This option is available to PeopleTools 8.59 and higher. If the rich text field has a character limit, and copying and pasting rich text content from an external source exceeds the maximum character limit of the field, try pasting the content as plain text to remove the underlying text formatting information that's included in the copied content, then reapply formatting as needed. This option is Fluid ePerformance only.

Configure Document Progression

<i>Field or Control</i>	<i>Description</i>
Allow Administrator to Advance Document	Select to activate the feature that enables administrators to advance performance documents to next available statuses. See Understanding Document Advancement.

Fluid Popup Menu Setup Page

Use the Fluid Popup Menu Setup page (EP_PMENU_SETUP) to configure actions for the **More Actions** menu in Fluid ePerformance.

Navigation:

Set Up HCM > Product Related > ePerformance > Fluid Popup Menu Setup > Fluid Popup Menu Setup

This example illustrates the fields and controls on the Fluid Popup Menu Setup page.

Fluid Popup Menu Setup

Menu LevelManager

ApplicationePerformance

Menu Application

Effective Date01/01/1900

System Data

Menu Definition

*StepAny Step

*TypeSection Heading

DescriptionMenu for Section Heading on Define Criteria step

Menu Details

Actions

Methods

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Sequence	Action	Image Name	Hide When Display Only	Owner ID	Sub ID	Text ID		
10	Add Item	PS_EP_PLUS_CIRCLE_BLUI	☐	HEP	FLU	PMENU_ADD_ITEM_FL	☐	☐
20	Define Section Weig	PS_EP_ALIGN_H_S_FL	☐	HEP	FLU	PMENU_SEC_WT_FL	☐	☐
30	Define Items Weight	PS_EP_BASELINE_V_S_FL	☐	HEP	FLU	PMENU_ITM_WT_FL	☐	☐
50	Reorder Items	PS_EP_FORMAT_GRAY_S_F	☐	HEP	FLU	PMENU_REORDER_FL	☐	☐

Menu Definition

Field or Control	Description
Menu Level	The system delivers menu levels for these user roles: <i>Manager</i> and <i>Employee</i> .
Application	Select the application or feature to which this popup menu definition applies. System-delivered values include: <i>Business Objectives</i> <i>ePerformance</i>

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Field or Control	Description
Step and Type	Specify the document status and type to which this popup menu definition applies. A type refers to the placement of the More Actions menu. Valid values include: <i>Document Heading:</i> the right hand side of the document header on the Performance Document page. See Document-Level More Actions. <i>Document List:</i> the right hand side of the document card on a document list. See Document-Level More Actions. <i>Document Step:</i> the right hand side of the step drop-down field on the Performance Document page. See Step-Level More Actions. <i>Item Detail:</i> the right hand side of the item header on the Performance Document Item page. See Item-Level More Actions. <i>Objective:</i> the right hand side of the business objective document card on a document list, or the right hand side of the business objective document header. See Document-Level More Actions. <i>Objective Item:</i> the right hand side of the objective row in a business objective document section, or the right hand side of the Edit Items page header. See Item-Level More Actions. <i>Participant List:</i> the right hand side of the participant row on the Add/Review Participants page. See More Actions for Participant Reviews. <i>Section Heading:</i> the right hand side of the section title in a document. See Section-Level More Actions (performance documents) and Section-Level More Actions (business objective documents). <i>Section Item:</i> the right hand side of the item row in a document section. See Item-Level More Actions. <i>Subitem:</i> the Add link on the right hand side of the sub-item's section title.
Description	Enter a description for the popup menu definition.

Menu Details

Field or Control	Description
Sequence	Enter the order in which the selected action appears in the popup menu. The action with the lowest number appears at the top of the list.
Action	Select the action to appear in the popup menu.
Image Name	Select the image to display for the action in the popup menu.
Hide When Display Only	Select to not show this action in the menu when the document is read-only.
Owner ID, Sub ID, and Text ID	Select the text to display for the action in the popup menu. Choose the object owner ID first, followed by the sub ID, then the text ID from the Text Catalog. The system delivers text IDs that begin with <i>PMENU_</i> for popup menu actions.
Root Package ID, Path, Class ID, and Method	Specify the application package information for the action. The specified application package is used to determine whether to show or hide this action from the menu at runtime. The method must return a boolean (true or false) value.

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 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:

<i>This field in Manage Profiles maps</i>	<i>To this field in ePerformance</i>
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 Note: The maximum length of the EP_TITLE field is 60 characters. The system displays the first 60 characters of the JPM_DESCR90 field (maximum length: 90) in the EP_TITLE field, and does not show the remainder of the content that exceeds the length limit.
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 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:

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

<i>This field in a Non-Person Profile maps</i>	<i>To this field in ePerformance</i>	<i>Field Label in ePerformance</i>
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 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: Oracle PeopleSoft delivers Notification Composer Framework to manage the setup and administration of all notifications in one central location.

Once you have adopted the Notification Composer feature, you must use it to create new notifications and manage your existing notifications.

Notifications delivered with HCM Image 47 or later must use Notification Composer.

For more information about Notification Composer Framework, see “Understanding Notification Composer” (Enterprise Components).

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” (Approval Framework).

Video: [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” (Enterprise Components).

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 Page and Notification Texts

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 pages and in automatically generated 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.

Note: Oracle PeopleSoft delivers Notification Composer Framework to manage the setup and administration of all notifications in one central location.

Once you have adopted the Notification Composer feature, you must use it to create new notifications and manage your existing notifications.

Notifications delivered with HCM Image 47 or later must use Notification Composer.

For more information about Notification Composer Framework, see “Understanding Notification Composer” (Enterprise Components).

ePerformance uses Notification Composer to send notifications and Text Catalog to maintain the texts used in those notifications.

Related Links

“Configuring the Text Catalog” (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” (Application Fundamentals).

ePerformance Text Catalog Settings

ePerformance makes use of the text catalog for storing text that appears on 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 <i>D</i> 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 (<i>business objectives</i>)	Enter <i>O</i> in the Sub ID field and specify an applicable usage, text ID or both for the search.
Performance Notes	Enter <i>NP</i> 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:

Field or Control	Description
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: <i>Acknowledged, Shared with Employee, Canceled, Completed, Define Criteria, Evaluation in Progress, Not Started, Approval, Pending Acknowledgement</i> or <i>Track Progress</i> .
Track Progress Sub Status	Select the number of the checkpoint (from <i>I</i> to <i>II</i>) or <i>F</i> (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.
ADV-STATUS-SBJ ADV-STATUS-BDY	Manager or Employee	A document is advanced by an administrator after the completion of the Advance Performance Documents process (run type: Confirm).

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-UPDEE-BDY	Manager	An employee adds an item to the criteria document.
BASELINE-UPDMGR-SBJ BASELINE-UPDMGR-BDY	Employee	A manager adds an item to the criteria document.
CASCADE-CMP-MG-SBJ CASCADE-CMP-MG-BDY	Manager	The Cascade Items process (run type: Confirm) for a business objective document section has been completed.
CASCADE-OBJ-AD-SBJ CASCADE-OBJ-AD-BDY	Administrator	One or more objective items are cascaded to an employee's performance document.
CASCADE-OBJ-EE-SBJ CASCADE-OBJ-EE-BDY	Employee	One or more objective items are cascaded to the employee's own 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.
CASCADE-PRV-MG-SBJ CASCADE-PRV-MG-BDY	Manager	The Preview Cascade Items process for a business objective document section has been completed.
CHG-DUEDATE-SBJ CHG-DUEDATE-BDY	Manager, Employee or Multi-Participant Reviewer	A manager or ePerformance HR administrator changes the due date of an evaluation.
CHG-STATUS-SBJ CHG-STATUS-BDY	Manager, Employee or Multi-Participant Reviewer	An ePerformance HR administrator or manager resets the status of the evaluation to <i>Evaluation in Progress</i> . This can happen if an evaluation is prematurely advanced to the next stage of the process.

Text ID	Recipient	Condition for Creating
CHKPOINT-COMP-SBJ CHKPOINT-COMP-BDY	Employee	A manager marks a checkpoint as <i>Completed</i> .
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.
EMPDOC-COMPLT-SBJ EMPDOC-COMPLT-BDY	Manager	An employee marks the employee evaluation as <i>Completed</i> .
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 <i>Completed</i> .
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.

Text ID	Recipient	Condition for Creating
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 an evaluation as <i>Pending Acknowledgement</i> . This message is sent to the employee requesting that they formally acknowledge the evaluation.
RQST-REVIEW-SBJ RQST-REVIEW-BDY	Employee	A manager changes the status of a manager evaluation to <i>Shared with Employee</i> .
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.

Note: The system names the text IDs for notification content using this format:

<Event><Notification type suffix>

For example, the text IDs for the notification content used when a manager shares comments on the performance document during the Track Progress step are:

Email subject: TRKPROG-SHARE-SBJ

Email body: TRKPROG-SHARE-BDY

Phone text: TRKPROG-SHARE-PHN

Push notification: TRKPROG-SHARE-PSH

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:

Field or Control	Description
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
CREATE-PAGE-SBJ CREATE-PAGE-BDY	Page owner	An Objective page has been created.
PUB-ORGAN-SBJ PUB-ORGAN-BDY	Organization	An Objective page is published.
PUB-OWNERS-SBJ PUB-OWNERS-BDY	Page owners	An Objective page is published.
PUBLISH-PAGE-SBJ PUBLISH-PAGE_BDY	Administrator	A Business Objectives document is published.
SUBMIT-PAGE-SBJ SUBMIT-PAGE_BDY	Page owner	An Objective page is ready for publication.
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.

Note: The system names the text IDs for notification content using this format:

<Event><Notification type suffix>

For example, the text IDs for the notification content used when an objective page is created are:

Email subject: CREATE-PAGE-SBJ

Email body: CREATE-PAGE-BDY

Phone text: CREATE-PAGE-PHN

Push notification: CREATE-PAGE-PSH

Text Substitution for Due Date Notifications

ePerformance references the same list of tokens in 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.

Text Catalog ID	Recipient	Condition for Creating
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 in 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.

Note: The system names the text IDs for notification content using this format:

<Event><Notification type suffix>

For example, the text IDs for the notification content used when a document is transferred by an automatic transfer process are:

Email subject: AUTO-XFER-SBJ

Email body: AUTO-XFER-BDY

Phone text: AUTO-XFER-PHN

Push notification: AUTO-XFER-PSH

Text Substitution for Performance Notes

ePerformance references these tokens in text catalog entries for note transfer email notifications:

- %1: The old note owner.

- %5: The component link for the newly transferred note.

Delivered Email Text Entries for Performance Notes

This table lists the delivered text entries that ePerformance uses in system-generated email notifications for performance note transfer. It specifies to whom and the condition when these notifications are generated and sent. Each delivered 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.

<i>Text Catalog ID</i>	<i>Recipient</i>	<i>Condition for Creating</i>
NP-TRANSFER-EE-SBJ NP-TRANSFER-EE-BDY	New note owner	A performance note has been transferred to a new owner.
NP-TRANSFER-MG-SBJ NP-TRANSFER-MG-BDY	New note owner	A performance note has been transferred to a new owner.

Note: The system names the text IDs for notification content using this format:

<Event><Notification type suffix>

For example, the text IDs for the notification content used when a performance note is transferred from an employee to a new owner are:

Email subject: NP-TRANSFER-EE-SBJ

Email body: NP-TRANSFER-EE-BDY

Phone text: NP-TRANSFER-EE-PHN

Push notification: NP-TRANSFER-EE-PSH

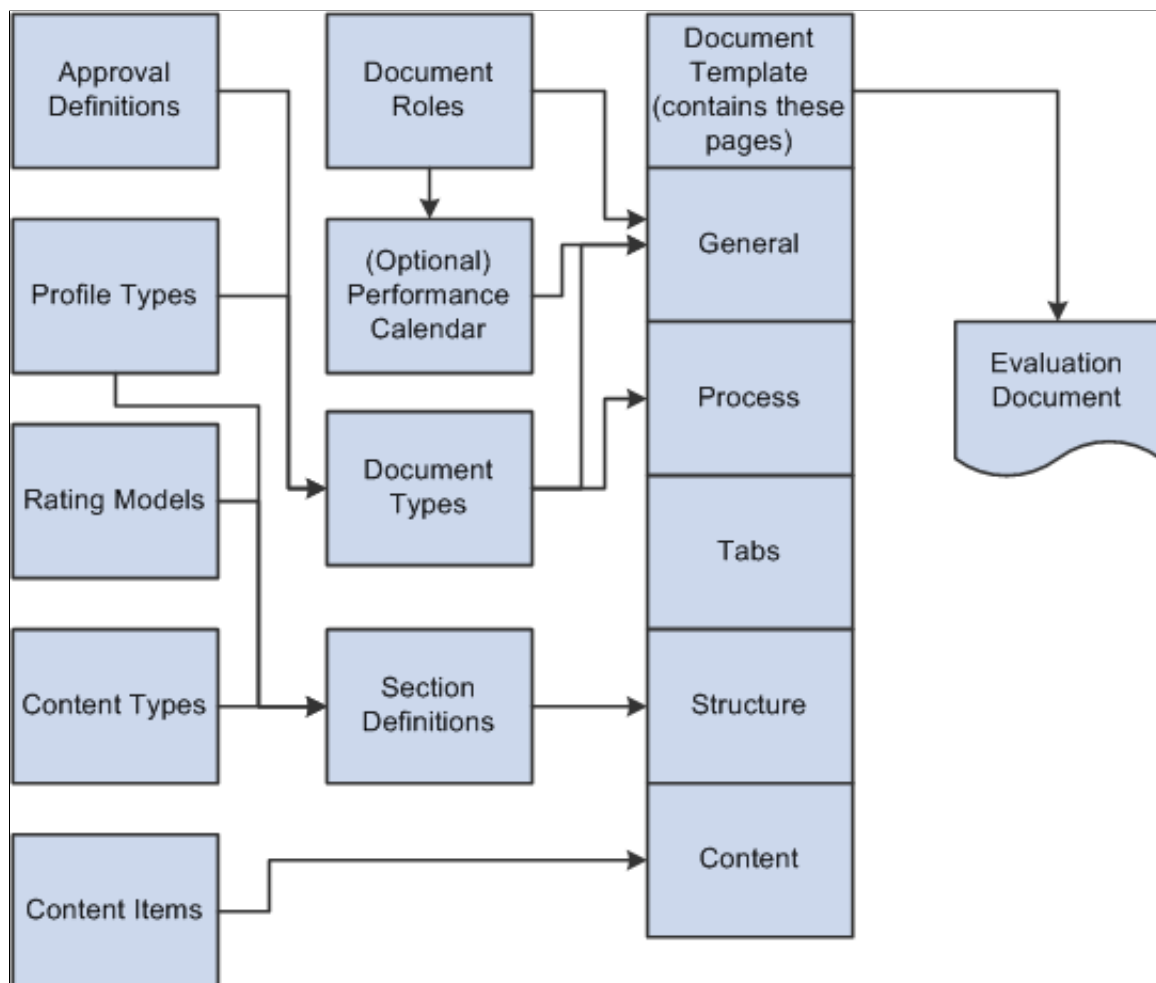
Setting Up Document Templates

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.

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.

Video: [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 Human Resources Plan Careers and Successions), “Succession Planning Self-Service” (PeopleSoft 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 Human Resources Plan Careers and Successions), “Succession Planning Self-Service” (PeopleSoft 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

<i>Page Name</i>	<i>Definition Name</i>	<i>Usage</i>
<u>Document Types Page</u>	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 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

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

Document Types

Document Type

K0ANNUAL

Document Type Detail ?

Q

|

<

<

1 of 1

>

>

|

View All

Effective Date

01/01/1980

*Status

Active

+

-

*Description

Annual Review

Short Description

Annual

☒

Official Review

*Document Usage

Performance

Initiate Process

☒ Employee

☒ Manager

☒ Employee can Select Manager

Clone Existing Document

☒ Employee

☒ Manager

Display in Document List

☒ Employee

☒ Manager

Template Source

☒ User Specified

☐ Profile Management

Profile Type

Default Template

Definition ID

ManagerToAdmin

Objective Plan

2023

<i>Field or Control</i>	<i>Description</i>
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.

Field or Control	Description
Document Usage	Select the process that uses the document type. Valid options are: • <i>Performance</i> Indicates that the system uses this document type for performance planning or evaluation. • <i>Development</i> Indicates that the system uses this document type for employee development. (Classic ePerformance) 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. (Classic ePerformance) 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. (Fluid ePerformance) Both performance and development documents appear on the document lists that are accessed from the Team Documents tile and My Documents tile. Documents can be filtered by document usage on these lists, if applicable.
Initiate Process	Select <i>Employee</i>, <i>Manager</i>, 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 (that is, creating new documents).
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 <i>Employee</i>, <i>Manager</i>, 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.

Field or Control	Description
Display in Document List	Select the roles of users who can view and access documents of this document type on document list pages. Values are <i>Employee</i> and <i>Manager</i>. Select at least one value. Both values are selected by default. If the Initiate Process field is selected for a role, the Display in Document List field for the same role is selected and not editable. This ensures that users can view the documents that they created for the document type. If you have document types that are meant for managers only, you can clear the Employee check box for the system to hide documents of these types on the document lists for employees. Supported document list pages include the ones that are accessible from: • Team Documents Tile (for users with <i>ePerformance Manager Fluid</i> and <i>Fluid Dashboard - MSS ePerf</i> roles). • My Documents Tile (for users with <i>ePerformance Employee Fluid</i> and <i>Fluid Dashboard - ESS ePerf</i> roles). • Team Performance Fluid navigation collection and Team Performance NavBar menu (for users with the <i>ePerformance Manager Fluid</i> role). • Performance Fluid navigation collection and Performance NavBar menu (for users with the <i>ePerformance Employee Fluid</i> role). Note: <i>Evaluations of Others</i> document lists are not affected by this display option. Note: This option is applicable to Fluid ePerformance only.
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.

Field or Control	Description
Profile Type	The system enables this field if you select the <i>Profile Management</i> option in the Template Source field. Select the profile type that is used by the Create Documents process to identify the document template. The list contains only nonperson profile types that have the ePerformance template association option included as a related object in the Profile Association Options group box on the Profile Types - Associations page.
Default Template	The system enables this field if you select the Profile Management option in the Template Source field. The Create Documents process uses the profile type and the employee's job data to determine the employee's nonperson profile and obtain the ePerformance template associated with that profile. Select the template that is used to generate the documents for this document type when the system cannot identify a template for the given profile type. Note: Because document types are defined before templates, return to the Document Type page after you define the default template and enter the value for this field.
Definition ID	Select the approval definition for documents of this type. Values include: • <i>ManagerOnly</i> This is a one-step approval process that routes the transaction to an approving manager. • <i>ManagerToAdmin</i> This is a two-step approval process that routes the transaction to an approving manager and then to the ePerformance HR Administrator. • <i>AdminOnly</i> 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

[Understanding Review and Approval Processes](#)

[Understanding Document Templates](#)

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

<i>Page Name</i>	<i>Definition Name</i>	<i>Usage</i>
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 > Define Participant Roles > Participant Roles

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

The screenshot shows the 'Participant Roles' page with the following details:

- Role ID:** PEER
- Role Details:**
 - *Effective Date:** 01/01/1900 (with a calendar icon)
 - *Status:** Active (with a dropdown arrow and plus/minus icons)
 - Description:** Peer
 - Long Description:** (empty text area with a plus icon)
- Navigation:** Find | View All | First 1 of 1 Last

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

<i>Page Name</i>	<i>Definition Name</i>	<i>Usage</i>
Performance Calendar Page	EP_CALEDAR	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_CALEDAR) to define performance calendars.

Navigation:

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

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

Performance Calendar

Calendar ID KOANNUAL

Description Annual Performance Calendar

Performance Period Find | View All First 1 of 2 Last

*Calendar Period ID 2011 *Status Active

*Period Begin Date 01/01/2011 *Period End Date 12/31/2011

Due Dates Personalize | Find | View All | First 1-7 of 7 Last

*Due Date Type	Checkpoint Sequence	Role	*Due Date
Approve Criteria			02/01/2011
Checkpoint Due	Checkpoint 01		07/15/2011
Finalize Criteria			12/15/2011
Nomination Due			12/15/2011
Evaluation Due		Employee	01/15/2012
Evaluation Due		Peer	01/15/2012
Evaluation Due		Manager	01/31/2012

Field or Control	Description
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.

Field or Control	Description
Due Date Type	Select a type for the due date you want to define. Values are: <i>Approve Criteria.</i> If selected, the approve criteria due date must be on or before any other specified due dates. <i>Checkpoint Due.</i> If due dates for all checkpoints are selected, then you must also specify the <i>Finalize Criteria</i> 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. <i>Finalize Criteria.</i> If selected, the finalize criteria due date must be on or before the nomination and evaluation due dates. <i>Nomination Due.</i> <i>Evaluation Due.</i>
Checkpoint Sequence	Select the checkpoint to which the corresponding checkpoint due date applies. This field becomes editable when <i>Checkpoint Due</i> is selected as the due date type. Values are <i>Checkpoint 01</i> through <i>Checkpoint 11</i>, 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 <i>Evaluation Due</i> 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 Document 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
<u>Section Definition Page</u>	EP_SECTION_DEFN	Define sections.

<i>Page Name</i>	<i>Definition Name</i>	<i>Usage</i>
<u>Define Content Group Page</u>	EP_CONTENT_SEC	Select both a content group type and a content group.

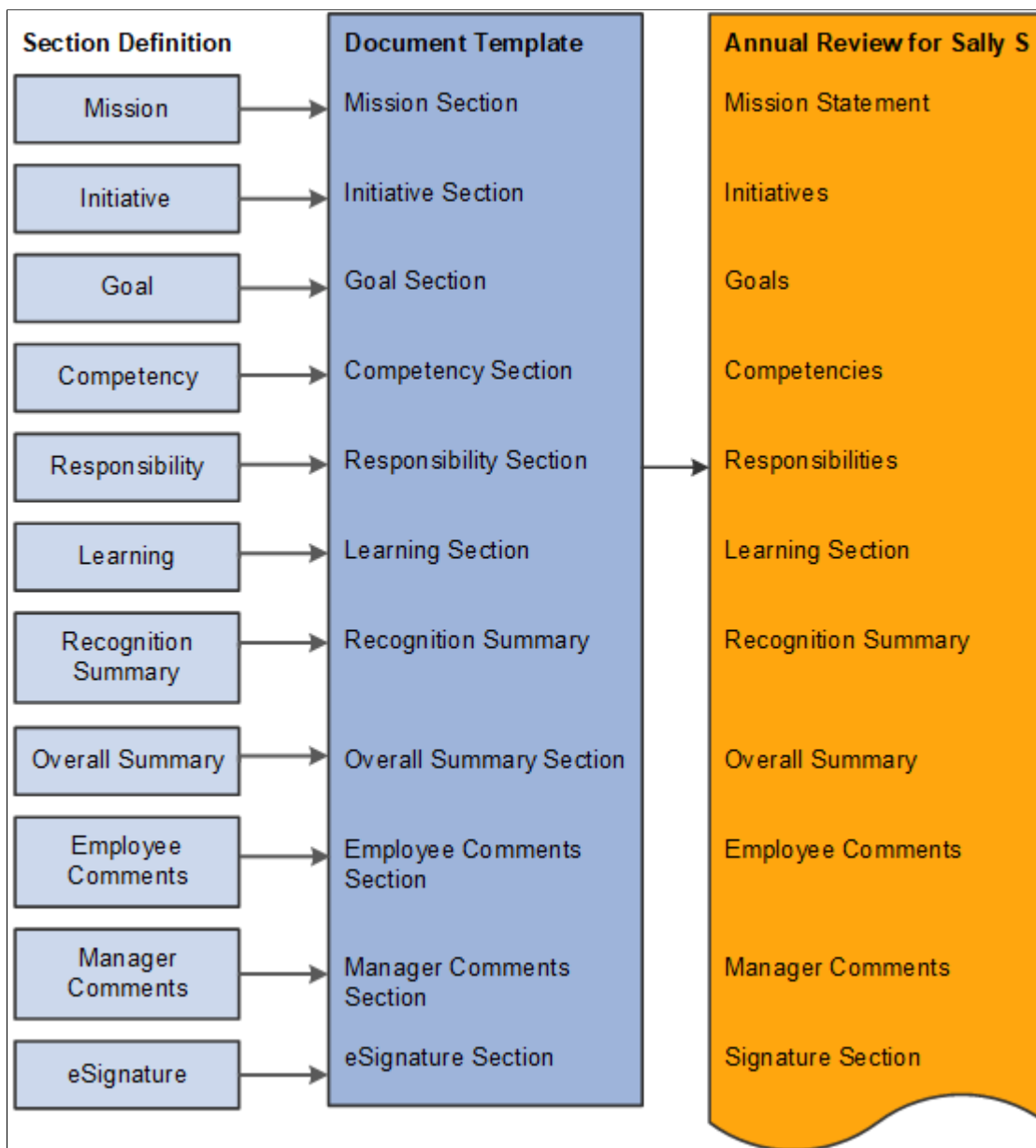
Understanding Document Sections

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.
- Recognitions that the employee received.
- A section for overall ratings and comments.
- A section for employee's to add additional comments.
- A section for manager's to add additional comments.
- A section for signatures.

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

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)
- Recognition Summary
- 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 [Manager and Employee Signatures for the eSignature Section](#).

- 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.

<i>If Special Processing is</i>	<i>Then the section</i>
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 sub-items.
Employee Comments	Cannot be rated or weighted. Cannot have items or sub-items.
Learning	Can be rated and weighted. Cannot have items or sub-items.
Manager Comments	Cannot be rated or weighted. Cannot have items or sub-items.
None	Can be rated and weighted. Can have items and sub-items.
Overall Summary	Can be rated and weighted. Cannot have items or sub-items.

<i>If Special Processing is</i>	<i>Then the section</i>
Recognition Summary	Can display employee recognitions that are added to performance documents. Cannot be rated or weighted Cannot have items or sub-items.
Signatures	Cannot be rated or weighted. Cannot have items or sub-items.
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 > Document Section Definition > Section Definition

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

Section Definition

Section Type

COMPETCY

Section Definition Detail

Effective Date

01/01/1900

*Status

Active

☐ Fluid Only Section

+

-

*Description

Competency Section

Section

☒ Rate

☐ Preliminary Rating

☒ Weight

Calculation Method

Average

Rating Model

K001

Rating Display

Stars

Map Ratings

Minimum Weight

0

Weight

0

*Special Processing

None

Items

☒ Enable Items

☐ Free-Form Allowed

☐ Rate

Content Type

Competencies

Define Content Group

Prompt Table

EP_J_CAT_ITEM_I

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

☐ Use Section Rating Model

☐ Weight

☒ Mandatory

☒ Description

☐ Due Date

☐ Ownership

☐ Percentage Completed

☐ Level of Difficulty

☐ Supports

☐ Status

☐ Empl Measures

☐ Start Date

☐ Target Rating

☐ Minimum Weight

☒ Critical

☐ Measures

☐ Reminder Date

☐ Stretch Goal

Link

User Defined Value

☐ Private - hide from employees

☐ End Date

Sub-Items

☒ Enable Sub-Items

☐ Free-Form Allowed

☒ Description

Sub-Item Label

Prompt Table

EP_J_CAT_SUB_I

Content Type

Sub-Competencies

Profile Management

☒ Initialize from Profile

Profile Type

Job

80

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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.

Field or Control	Description
Fluid Only Section	Select this check box if the corresponding section is applicable only to documents in Fluid. For example, the Recognition Summary section is a Fluid-only section.

Section

Field or Control	Description
Rate	Select this check box to enable a rating assignment for the section, either by a system calculation or manually. A rating field or display 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 <i>Business Objectives</i>, <i>Learning</i>, <i>None</i>, or <i>Overall Summary</i> is selected in the Special Processing field.
Calculation Method	Select the calculation method used for the section. Values include: • <i>Average</i> • <i>Review Band</i> • <i>Summation</i> The system enables this field if the Rate check box is selected and the Special Processing field is set to <i>Business Objectives</i>, <i>Learning</i>, <i>None</i>, or <i>Overall Section</i>.
Preliminary Rating	Select this check box to enable the 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 <i>Overall Summary</i>.

Field or Control	Description
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 <i>Business Objectives</i>, <i>Learning</i>, <i>None</i>, or <i>Overall Summary</i>.
Rating Display	Select how values of the selected rating model are displayed on documents. This field becomes editable after selecting a rating model. Values are: <i>Drop-Down Box</i> Note: Always use the <i>Drop-Down Box</i> option if the selected rating model has more than 5 rating values. <i>Radio Buttons</i> Note: Do not use the <i>Radio Buttons</i> option for Fluid ePerformance. If selected, the system treats the value as <i>Drop-Down Box</i>. (Fluid ePerformance only) <i>Stars</i>. This rating display supports rating models with 5 or less values.
Order By	Select how rating values are ordered using the setup data of the selected rating model. This field appears if the selected rating display is <i>Drop-Down Box</i>. Note: This option is Fluid ePerformance only. Values are: <i>Numeric Rating</i> (Numeric Rating column in rating model setup) <i>Rating Description</i> (Description column in rating model setup; default value) <i>Review Rating</i> (Rating column in rating model setup) Rating models are defined on the “Rating Model Page” (Application Fundamentals).

Field or Control	Description
Map Ratings	Select to assign a star rating value (<i>1 Star</i> through <i>5 Stars</i> to each review rating value of the selected rating model on the Map Ratings page (EP_MAP_RATING_TBL). This link appears if the selected rating display is <i>Stars</i>. Note: This option is Fluid ePerformance only. You must complete this mapping to use the star rating display.
Weight (check box)	Select this check box to enable the section to have a weighting relative to the other sections in the document. The system enables this check box if the Rate check box is selected and the Special Processing field is set to <i>Business Objectives</i>, <i>Learning</i>, or <i>None</i>. You cannot weigh sections of a performance document when you select a calculation method of <i>Summation</i> or <i>Review Band</i> for the Overall Summary section and elect to have the system calculate performance ratings. (You enter calculation instructions through the Template Definition component.) When selected, the Section Weight field appears in the section summary of documents created from templates that include this section. The field name is changed to Summary Weight when the document is in the <i>Evaluation in Progress</i> status.
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 (field)	Enter the default weight for the section. The system enables this check box if the Weight check box is selected.

Field or Control	Description
Special Processing	This field determines the type of information that is entered in this section and how the system processes the information. • <i>Business Objectives</i> – 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. • <i>Career Plan Summary</i> – 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 <i>Manager</i> role is available for selection. • <i>Employee Comments</i> – Select this option if this section is used by employees to enter and edit comments on the self-evaluation when the evaluation status is <i>Shared with Employee</i>, <i>Pending Acknowledgement</i>, or <i>Acknowledged</i>. 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 the Section Definition page become unavailable. • <i>Learning</i> – 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. • <i>Manager Comments</i> – 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 <i>Evaluation in Progress</i>, <i>Shared with Employee</i>, <i>Pending Acknowledgement</i>, or <i>Acknowledged</i>. When selected, all fields on the Section Definition page become unavailable.

Field or Control	Description
	• <i>None</i> – 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. • <i>Overall Summary</i> – 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 <i>Overall Summary</i>. When selected, all fields on the Section Definition page except the Rate field become unavailable. • <i>Recognition Summary</i> – Select this option to enable managers and employees to insert and view recognitions received by employees. • <i>Signatures</i> – 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 Section Definition page 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. • <i>eSignatures</i> – 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. When selected, all fields on the Section Definition page become unavailable.

Field or Control	Description
	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.

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

Field or Control	Description
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 in documents the items that were loaded on the Template Definition - Content page for the section, as well as items that are added manually by users when they work on the 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 option 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.

Field or Control	Description
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 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. The system enables this check box if the Rate check box in the Section group box is selected. When 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 sub-items on the document template default to the section rating model. The system enables this check box if the Rate check box is selected and 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. The system enables this check box if the Rate check box is selected. When selected, the Weight field appears on the Template Definition - Content page where you can enter the default weight for the corresponding item. At runtime, the Weight field appears for each item in documents created from templates that include this section.

Field or Control	Description
Target Rating	Select this check box to indicate that content items can have a target proficiency rating assigned in the Target Rating field 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 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 to allow items added to the template to be considered mandatory and therefore not to be edited or deleted. When selected, the Mandatory check box appears on the Template Definition - Content page where you can indicate if any section item added to the template, either manually or loaded from a profile, is mandatory or not. If the Mandatory check box is selected for an added item on the Content page of a template, the item cannot be deleted from documents that are created using that template. Also, specific attribute information of the item, such as due date and target rating, is read-only and cannot be edited.
Minimum Weight	Select this check box if content items need to have a minimum weighting. When selected, the Minimum Weight field appears on the Template Definition - Content page where you can enter the minimum weight for the corresponding item.
Description	Select this check box to display the Description field on the Template Definition - Content page, as well as documents created using templates that include this section. 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.

Field or Control	Description
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 toward 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 <i>Basic</i> , <i>Intermediate</i> and <i>Advanced</i> as its values. You can associate these values with the difficulty of an item. When an item from the Content Catalog is added, this field displays the level of difficulty associated with that item and you cannot edit the values. If the item is manually added, you can select the level of difficulty unless the item is marked mandatory on the Template Definition - Content page.

Field or Control	Description
Align Items and Links To	If you select <i>Business Objectives</i> 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 <i>Any Section</i> 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 <i>Business Objectives</i> 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 <i>Complete</i>, <i>In Progress</i>, and <i>N/A</i> (Not Applicable). The values that are available for selection in the User Defined Value field are defined on the “Custom Prompt Page” (PeopleSoft 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.

Field or Control	Description
Private - hide from employees	Select this check box if you want to enable managers or employees to indicate the privacy setting of items they are defining in this section. When an item is set as private, it cannot be copied to other documents.
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 set 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.

Field or Control	Description
Enable Sub-Items	Select this check box to indicate that the section can contain sub-items. Sub-items are typically sub-competencies that are created through the Competency section.
Sub-Item Label	Specify the label used to name sub-items in this section, if applicable. If not specified, the default label for sub-items is <i>Sub-Item</i>. Note: This field applies to Fluid ePerformance only. It becomes editable when the Enable Sub-Items field is selected.
Free-Form Allowed	Select this check box to enable users to add free-form (non-coded) sub-items to this section.
Prompt Table	Select the name of the table that holds the sub-items that are included in the section.

Field or Control	Description
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 sub-item appear on the evaluation. During the evaluation process, managers can click an update link on the evaluation to edit the description for the sub-item.

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.

Field or Control	Description
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.

This example illustrates the fields and controls on the Profile Types - Identities page.

Attributes

Identities

Content

Associations

Profile Type

JOB

Identity Options ?

Q

|

1 of 1

View All

*Effective Date

01/01/1900

*Status

Active

+

*Description

Job

☒ System Data

Acknowledgement ID

Q

☐ Approval Req'd for Identities

Profile Identity Options

Q

1-4 of 4

*Profile Identity Option	Request Acknowledgement	Sys Data	
Job Code	☐	☒	
Job Family	☐	☒	
Position Data	☐	☒	
Salary Grade	☐	☒	

+

Add Profile Identity

2. Identifies, for each profile identity option, key values that are specified for all of the profiles.

This example illustrates the fields and controls on the Non-person Profile page.

Non-person Profile

Profile ID

N900002

Profile Type

JOB

Job

*Profile Status

Active

*Description

Pos N900002

Short Description

JPMPOSN2

Print

Comments

Profile Actions

[Select Action]

Competencies

Responsibilities

Qualifications

NVQ

Worn Rank

Competencies

1-1 of 1

View All

ID	Competency	
0201	Accountability for decisions	

+

Add New Competencies

▸

Profile Identities

+

Add Profile Identity

▸

Profile Associations

+

Add Profile Association

3. Orders these profile identity options according to the order sequence that is specified on the “Profile Identity Options Page” (PeopleSoft 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.

This example illustrates the fields and controls on the Define Content Group page.

The screenshot shows a modal dialog titled "Define Content Group". It contains a "Section Definition" section with a "Help" link. Under this section, there are two dropdown menus labeled "Content Group Type" and "Content Group". At the bottom of the dialog are two buttons: "OK" and "Cancel".

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

<i>Page Name</i>	<i>Definition Name</i>	<i>Usage</i>
<u>Define Review JPN Page</u>	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

[Understanding Document Templates](#)

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

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

The screenshot shows the 'Define Review JPN' page with the following fields and values:

- Set ID:** JGENL
- Review ID:** J2001PFR
- *Description:** 2001 Performance Review
- Short Description:** 2001Performance
- Period Begin Date:** 10/01/2001 (with a calendar icon showing 31)
- Period End Date:** 03/31/2002 (with a calendar icon showing 31)
- *Document Type:** J02 (with a magnifying glass icon)
- Japan Performance Review** (text label)
- ☐ **Include in Grade Advance**

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

Field or Control	Description
Period Begin Date and Period End Date	Enter the first and last dates of the performance period. This information is informational only. See Template Definition - General Page .
Document Type	Select the document type that is valid for the selected setID.

Field or Control	Description
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 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
<u>Template Definition - General Page</u>	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.

Page Name	Definition Name	Usage
<u>Template Definition - Process Page</u>	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.
<u>Template Definition - Tabs Page</u>	EP_TAB_DTL	Define tab labels and display order for use, if the performance documents are configured to display in tabbed format.
<u>Template Definition - Structure Page</u>	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.
<u>Template Definition - Content Page</u>	EP_TMPL_DEFN4	Add criteria to sections.
<u>Load Content From Profile Page</u>	EP_TMPL_DEFN5	Load content from profiles. Profiles can be used to load criteria into sections.
<u>Clone Template Definition Page</u>	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 participate in the performance or development process. You can also designate that documents using this template are recognized by the system as the official review.

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

By selecting **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:

<i>Calculation Method for Overall Summary Section</i>	<i>Calculation Methods Allowed for Other Sections</i>	<i>Section Weighting Allowed?</i>	<i>Rating Calculations</i>
Average	Average	Yes	To determine item ratings, the user enters the item rating. If sub-items exist, the system calculates the item rating by taking the average of the sub-items. 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 <i>no</i> 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.

<i>Calculation Method for Overall Summary Section</i>	<i>Calculation Methods Allowed for Other Sections</i>	<i>Section Weighting Allowed?</i>	<i>Rating Calculations</i>
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 [Defining Sections](#) and [Template Definition - Structure Page](#).

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 Human Resources Manage Profiles).

See “Understanding Profile Comparisons” (PeopleSoft Human Resources Manage Profiles).

See [Defining Document Types](#).

See [Defining Roles](#).

See [Defining Performance Calendars](#).

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 [Performance Management Tile](#). On the left navigation, select **Performance Documents > Template Definition**.
- (Classic) **Set Up HCM > Product Related > ePerformance > Document Structure > Template Definition > Template Definition - General**

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

Template Definition			
General	Process	Tabs	Structure
Document Type K0ANNUAL Document Type Description Annual Review			
Template ID K0MIDPER Effective Date 01/01/1980			
*Description Annual with Mid-Period *Status Active		*Display Type Tabs Format Only ☒ Official Review ☒ Language Checker ☒ Concatenate Page Title	
Business Process ☒ Define Criteria ☒ Track Progress ☒ Nominate Participants			
Document Due Date Method Due Date Method Performance Calendar Calendar ID K0ANNUAL Calendar Period ID 2023 (Displays Dates in Template Only)			

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

Comments Box Options

Minimum Character Count

0

Fluid Template Options

*View Instructions

Display in Modal Window

☐ Allow Managers to Exclude Item Ratings from Calculation

Evaluations

Participants

Evaluation Document Header

⌵

*Role	Evaluation	Allow Document Download	Calendar Period Due Date		
Peer	☒	☐	01/31/2024	+	-
Employee	☒	☒	02/15/2024	+	
Manager	☒	☒	02/29/2024	+	

Field or Control	Description
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: Note: Fluid ePerformance only supports the <i>Long Format Only</i> option. <i>Long Format Only:</i> (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. <i>Tabs Format Only:</i> Document is displayed in sections as represented by tabs. <i>Toggle - Default Long:</i> Document is displayed in long format by default and users can toggle between long and tabbed format. <i>Toggle - Default Tabs:</i> 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 <i>Long Format Only</i>, 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.

Field or Control	Description
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 <i>Define Criteria - Update</i> if this option is selected. If this option is not selected, the page title reads <i>Define Criteria</i> 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.

Field or Control	Description
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 Step 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 <i>Define Criteria</i> step for performance documents that are created from this template.
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 and the Finalize Criteria step for performance documents that are created from this template.
Nominate Participants	Select to enable the 360 degree feedback functionality where users can add and track participant nominations, provide peer reviews, and view participant feedback. 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.

Note: ePerformance integrates with Team Calendar to display performance document due dates. From the Team Calendar, you can view document due date reminders for your team members, and have the option to perform related actions, such as opening the document for update, or viewing other performance documents.

See “Using Fluid Manager Calendar View” (PeopleSoft Absence Management).

Video: [Image Highlights, PeopleSoft HCM Update Image 43: Accessing Performance Management from Team Calendar](#)

Field or Control	Description
Due Date Method	Select the method used to calculate document due dates. Values are: <i>Performance Calendar:</i> 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. <i>Template Setup:</i> Use the Document Due Days and Period Type fields specified by role in the Evaluations section to determine the due dates when a document is created.
Calendar ID and Calendar Period ID	Enter the ID of a calendar and calendar period, if <i>Performance Calendar</i> 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](#).

Comments Box Options

<i>Field or Control</i>	<i>Description</i>
Minimum Character Count	Specify the minimum number of characters users must provide when they enter <i>required</i> review comments in documents. The system checks the character count on a document when: • The employee selects the action button to complete an evaluation. Or • The manager selects the action button to share, complete an evaluation, or submit it for approval. Note: This option is applicable to Fluid ePerformance only. This value is required if at least one Comments Required option is selected for a role for the Evaluation step on the Template Definition - Structure Page.

Fluid Template Options

<i>Field or Control</i>	<i>Description</i>
View Instructions	Select the location where user instructions (if available) for document steps and sections are shown. Values are: <i>Display in Modal Window:</i> (Default) Text is displayed on the Instructions page that appears when you select <i>View Instructions</i> from the More Actions menu of a document step or section. <i>Display on Document Page:</i> Text for the step is displayed in the Instructions section that appears below the document header. Text for the section appears below the section name. Instructions are defined in Text Catalog. The system displays the applicable text based on information such as the document usage, the role of the logged-in user, the current document step, and the document section.

Field or Control	Description
Allow Managers to Exclude Item Ratings from Calculation	Select to provide managers the ability to specify items to be excluded from the overall rating calculation of documents in the <i>Evaluation in Progress</i> status. When selected, additional setup options are available in the Final Evaluation Step - Role Rules section to control if managers can exclude items, sub-items, or both from rating calculation. This check box becomes editable if the Calculate Ratings check box is selected on the Template Definition - Process Page.

Evaluations - Participants

Field or Control	Description
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. To support peer reviews in evaluations, add a role (other than <i>Manager</i> or <i>Employee</i>) for which you can nominate participants and set up evaluation rules.
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, a self evaluation becomes available for the employee to provide evaluation feedback. 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 required for all reviews.

Field or Control	Description
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). Note: (Fluid ePerformance only) When selected, the <i>Export</i> action becomes available in the document-level More Actions menu for users to view and download the document in 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 <i>Performance Calendar</i> 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 <i>Template Setup</i> 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 <i>In Progress</i> to change the due date. Also managers can not change the due dates on their own documents. Only the administrator can do this.

Field or Control	Description
Period Type	Select one of these values to indicate the period in which the number of days you entered should apply: • <i>Before Period End Date</i> • <i>After Period End Date</i> This field appears if the <i>Template Setup</i> 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 one or more Evaluation Document Header fields are selected, the system displays the information in the collapsible section located in the header area of the evaluation document for the corresponding role.

Field or Control	Description
Empl ID (employee ID)	Select this check box to display the employee'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.

Field or Control	Description
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. Note: (Fluid ePerformance only) When selected, the <i>Rating History</i> action becomes available in the document-level More Actions menu. 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 [Performance Management Tile](#). On the left navigation, select **Performance Documents > Template Definition**.
- (Classic) **Set Up HCM > Product Related > ePerformance > Document Structure > Template Definition > Template Definition - Process**

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

Template Definition

[New Window](#) | [Help](#) | [Personalize Page](#)

[General](#)
[Process](#)
[Tabs](#)
[Structure](#)
[Content](#)

Document Type KOANNUAL
Document Type description Annual Review

Template ID KOMIDPER
Effective Date 01/01/1980

Define Criteria Step ⓘ

Updated By Manager and Employee

Approved By Manager

Approval Due Date 03/15/2023

Allow Attachments

Track Progress Steps

Mid-Period Checkpoints ⓘ

Updated By Manager and Employee

No. of Checkpoints 1

Allow Attachments

Scheduled Checkpoints

Checkpoint	Checkpoint Due Date
1	07/14/2023

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

Finalize Criteria ?

Completed By
☐ Copy Ratings to Evaluation
 Final Due Date 12/31/2023 ☒ Copy Comments to Evaluation
 Allow Attachments

Nominate Participants ?

Added By Submitted By
 Tracked By ☐ Allow both Manager and Employee to submit
 Calendar Due Date 12/31/2023 ☒ Employee can view before submit
☐ Allow participant feedback at anytime ☒ Employee can delete before submit

Nomination Role Rules

Role	Minimum Required	Maximum Required	Anonymity for Employee	Anonymity for Manager
Peer	0	5	☐	☐

Review Participant Evaluations ?

Track Evaluations
 View Evaluations

Anonymity

Role	Anonymity for Employee	Anonymity for Manager	Display Names in Mgr Doc
Peer	☐	☐	☐

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

Manager Evaluation ?

*Review Process
 Definition ID
 View Average Rating ☒ Manager ☒ Employee
☒ Cancel Outstanding Evaluations
☒ Allow Manager Attachments
☐ Allow to View Recognitions

Self Evaluation

☐ Allow Employee Attachments
☐ Allow to View Recognitions

Evaluation Rules ?

*Rounding Rule Decimal Places
☐ Calculate Ratings
 *Map Method

☒ Japan

 Review ID
☐ Include in Grade Advance

Note: The page sample shown here is for a performance document template. 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.

Field or Control	Description
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 <i>After Period End Date</i> or <i>Before Period End Date</i> to be the approval due date. This field appears if <i>Template Setup</i> is selected as the due date method.
Approval Due Date	Displays the calculated approval due date. This field appears if <i>Performance Calendar</i> is selected as the due date method.
Allow Attachments	Select to allow the manager, employee, or both to add attachments to documents in the Define Criteria step. Note: This option is Fluid ePerformance only. The system automatically selects: • The Allow Manager Attachments option in the Manager Evaluation section if the manager is allowed to add attachments in this step. • The Allow Employee Attachments option in the Self Evaluation section if the employee is allowed add attachments in this step.

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 the evaluation.

This section appears if the **Track Progress** business process is selected on the **General** page and contains these sub-sections:

- Mid-Period Checkpoints
- Scheduled Checkpoints
- Finalize Criteria

Mid-Period Checkpoints

Field or Control	Description
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 <i>Template Setup</i> on the Template Definition - General page. If the due date method is set to <i>Performance Calendar</i>, 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.
Allow Attachments	Select to allow the manager, employee, or both to add attachments to documents for the Checkpoint step. Note: This option is applicable to Fluid ePerformance only. The system automatically selects: • The Allow Manager Attachments option in the Manager Evaluation section if the manager is allowed to add attachments in this step. • The Allow Employee Attachments option in the Self Evaluation section if the employee is allowed add attachments in this step.

Scheduled Checkpoints

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

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

Finalize Criteria

Field or Control	Description
Completed By	Select the user roles who can complete the Finalize Criteria step in documents so the evaluation steps can begin.
Copy Ratings to Evaluation	Select for the system to copy the latest ratings from the Finalize Criteria step to the employee and manager evaluations. Only ratings entered by the employee will be copied to the employee's self evaluation and only ratings entered by the manager will be copied to the manager evaluation. Note: This option is Fluid ePerformance only.
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's 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 <i>After Period End Date</i> or <i>Before Period End Date</i> to be the criteria completion due date. These fields appear if <i>Template Setup</i> is selected as the due date method.
Final Due Date	Displays the calculated criteria completion due date. This field appears if <i>Performance Calendar</i> is selected as the due date method.

Field or Control	Description
Allow Attachments	Select to allow the manager, employee, or both to add attachments to documents for the Finalize Criteria step. Note: This option is applicable to Fluid ePerformance only. The system automatically selects: • The Allow Manager Attachments option in the Manager Evaluation section if the manager is allowed to add attachments in this step. • The Allow Employee Attachments option in the Self Evaluation section if the employee is allowed add attachments in this step.

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.

This section appears if the **Nominate Participants** business process is selected on the **General** page.

Field or Control	Description
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.
Allow both Manager and Employee to submit	Select this check box to allow both the manager and employee to submit participant nominations for the review. If selected, the system ignores the Submitted By field. It sets <i>Manager</i> as the default value if the field is blank. If this check box is cleared, the system uses the Submitted By field value to determine the role that can submit nominations. Note: This option is applicable to Fluid ePerformance only.
Tracked By	Select the user roles who can track the nomination process.

Field or Control	Description
Nominations in days	Enter the number of days <i>After Period End Date</i> or <i>Before Period End Date</i> to be the due date for nominating review participants.
Calendar Due Date	Displays the calculated nomination due date. This field appears if <i>Performance Calendar</i> is selected as the due date method.
Allow participant feedback at anytime	Select to allow participants to start their evaluations of the employee anytime after documents are started. When this option is selected, authorized users can add, submit, and track nominations throughout the evaluation cycle - starting from the Define Criteria step (if enabled) until the substep to update manager evaluation is completed. Participants are able to accept and start their evaluations during the same period of time as well. If this option is not selected, authorized users can add nominations as soon as the first step is in progress but they can submit nominations only after the step to update manager evaluation has started (when the document status is changed to <i>Evaluation in Progress</i>).
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.

Nomination Role Rules

<i>Field or Control</i>	<i>Description</i>
Minimum Required and Maximum Required	Specify the minimum and maximum nominations allowed for the corresponding non-manager or non-employee role that is added to the Evaluations section on the General page. (Fluid ePerformance only) If the Allow participant feedback at anytime option is selected, the Minimum Required field becomes uneditable.
Anonymity for Employee and Anonymity for Manager	Select if you want participants of the corresponding role to remain anonymous to the employee, the manager, or both, after nomination submission. Note: (Fluid ePerformance only) When selected, the system masks the participant identity after the nomination is submitted and is in the <i>Pending</i>, <i>Declined</i>, or <i>Withdrawn</i> status. The system uses the anonymity options in the Review Participant Evaluations section to mask the participant identity for accepted nominations. It is recommended that both sets of anonymity options be identical. When selected, the system displays participant names in this format on the page when you select the Track Nominations link: <role name><sequence #>, for example, Peer1 and Peer2. Note: (Fluid ePerformance only) When selected, participant names for nominations that are <i>Pending</i>, <i>Declined</i>, or <i>Withdrawn</i> are displayed in the <role name><sequence #> format on the Add/Review Participants page.

Review Participant Evaluations

Use 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 Template Definition - General Page.

Field or Control	Description
Track Evaluations	Select the user roles who can see the names of people who are participating in the review using the Track Nominations link of the Nominate Participants step. (Fluid ePerformance only) Users track participant evaluations on the Add/Review Participants page.
View Evaluations	Select the user roles who can drill down to view participants' evaluations using the View link of the Review Participant Evaluations step. If you specify user roles in this field, you should do so in the Track Evaluations field as well. (Fluid ePerformance only) Users view participant evaluations on the Add/Review Participants page.

Anonymity

The **Anonymity** group box allows you to indicate if the participants reviewing the evaluation (for roles that are added to the Evaluations section on the General page, except *Manager* and *Employee*) should be anonymous to the employee, manager, or both.

Field or Control	Description
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: <i><role name><sequence #></i>. For example, if you select the Anonymity for Employee field to hide the names of all participants of the <i>Peer</i> role from the employee, the system displays participants' names as <i>Peer1</i>, <i>Peer2</i> and so on when the employee reviews participants' evaluations using the View link of the Review Participant Evaluations step, if enabled. Similarly, if the Anonymity for Manager option is enabled for the <i>Peer</i> role, the system displays participants' names the same way when the manager views participants' evaluations using View link of the Review Participant Evaluations step, or reviews participants' feedback at the section level, item level, and sub-item level that appears in the manager document. Note: (Fluid ePerformance) When selected, participant names for nominations that are <i>Accepted</i>, <i>In Progress</i>, <i>Canceled</i> or <i>Completed</i> are displayed in the <i><role name><sequence #></i> format on the Add/Review Participants page and anywhere in the document where participant feedback is displayed. The participant's photo and project information (if available) are not shown.
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

Field or Control	Description
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: • <i>Apvl After Review-3 Steps</i> (approval after review-3 steps). • <i>Apvl After Review-4 Steps</i> (approval after review-4 steps): Select if the document approval occurs after the manager reviews the completed document with the employee. • <i>Apvl Before Review-3 Steps</i> (approval before review-3 steps). • <i>Apvl Before Review-5 Steps</i> (approval before review-5 steps): Select if the approval must occur before the manager reviews the completed document with the employee. • <i>Apvl No Review</i> (approval no review): Select if an approval process is required, but the manager does not need to review the document with the employee. • <i>No Apvl No Review</i> (no approval no review): Select if neither an approval process or a review of the completed document is required. • <i>No Apvl with Review-2 Steps</i> (no approval with review-2 steps). • <i>No Apvl with Review-4 Steps</i> (no approval with review-4 steps): Select if the manager reviews the completed document with the employee, but no approval process applies. See Understanding Review and Approval Processes.

Field or Control	Description
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: • <i>ManagerOnly</i> This is a one-step approval process that routes the transaction to an approving manager. • <i>ManagerToAdmin</i> This is a two-step approval process that routes the transaction to an approving manager and then to the ePerformance HR Administrator. • <i>AdminOnly</i> 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 for the system to automatically cancel the employee's self-evaluation that is not completed as well as the nominations that are not accepted when the manager evaluation moves past the <i>Evaluation in Progress</i> status. Note: Oracle recommends that you enable this option, which can be used to prevent late evaluations from coming in and altering the average ratings.

Field or Control	Description
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: • (Fluid ePerformance) Adds the <i>Attachments</i> action to the More Actions menu. • (Classic ePerformance) Adds a new section to the bottom of the manager document, This allows the manager to attach documents and specify user access when the evaluation is in the <i>Evaluation in Progress</i> status. This check box is selected automatically, if the manager is allowed to add attachments in the Define Criteria, Checkpoint, or Finalize Criteria step. Note: This attachment section is visible in the manager document to users who have access to attachments that were uploaded 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 <i>Evaluation in Progress</i>. Once the document moves past the <i>Evaluation in Progress</i> status or is canceled, the system does not allow attachments to be added or deleted. They become read-only.
Allow to View Recognitions	Select this check box for managers to be able to view employees' recognition posts on performance documents in the <i>Evaluation in Progress</i> status. This check box appears if the Enable Recognition option is selected on the “HCM Options Page” (Application Fundamentals). See “Understanding Recognition” (Application Fundamentals).

Self Evaluation

<i>Field or Control</i>	<i>Description</i>
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: • (Fluid ePerformance) Adds the <i>Attachments</i> action to the More Actions menu. • (Classic ePerformance) Adds a new section to the bottom of the self-evaluation. This allows the employee to attach documents and specify user access when the evaluation is in the <i>Evaluation in Progress</i> status. This check box is selected automatically, if the employee is allowed to add attachments in the Define Criteria, Checkpoint, or Finalize Criteria step. Note: This attachment section is visible in the self-evaluation to users who have access to attachments that were uploaded 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 <i>Evaluation in Progress</i>. Once the document moves past the <i>Evaluation in Progress</i> status or is canceled, the system does not allow attachments to be added or deleted. They become read-only.
Allow to View Recognitions	Select this check box for employees to be able to view their own recognition posts on self-evaluations in the <i>Evaluation in Progress</i> status. This check box appears if the Enable Recognition option is selected on the “HCM Options Page” (Application Fundamentals). See “Understanding Recognition” (Application Fundamentals).

Evaluation Rules

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

Field or Control	Description
Rounding Rule	Specify how the system should round calculated ratings whenever the system uses the <i>Average</i> calculation method. Values are <i>Round Down</i> <i>Round Up</i> <i>Standard Rounding</i> With standard rounding, the system rounds up on 5 and rounds down on 4. For example, 2.5 rounds to 3, while 2.4 rounds down to 2. This works in combination with the number of decimal places the system rounds to. For one decimal place, 2.45 rounds to 2.5, while 2.44 rounds to 2.4.
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 perform all roll-up calculations to calculate ratings for items (if sub-items exist), section summaries, and overall summaries. This feature is selected by default. When selected, the Calculate All Ratings option becomes available in the document, and the Calculate Rating button appears next to ratings fields where system calculation is available in the final evaluation. To have evaluators manually enter all ratings, deselect this check box. Note: (Fluid ePerformance only) <i>Calculate All Ratings</i> is available as an action from the More Actions menu of the <i>Evaluation</i> step.

Field or Control	Description
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. Available values are: <i>Nearest Rating</i> <i>Next Highest Rating</i> <i>Next Lowest Rating</i> 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: • <i>Next Highest Rating</i> yields the next numerically highest rating—in this case 3, or Average. • <i>Next Lowest Rating</i> yields the next numerically lowest rating—in this case 2, or Good. • <i>Nearest Rating</i> 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.

Field or Control	Description
(JPN) Include in Grade Advance (applicable for grade advance)	Select this check box if the selected review ID is eligible for the Grade Advance feature of the Plan Salaries business process. It is selected automatically if the Include in Grade Advance check box is selected on the 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 [Performance Management Tile](#). On the left navigation, select **Performance Documents > Template Definition**.
- (Classic) **Set Up HCM > Product Related > ePerformance > Document Structure > Template Definition > Template Definition - Tabs**

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

General

Process

Tabs

Structure

Content

Document Type

K0ANNUAL

Document Type Description

Annual Review

Template ID

K0MIDPER

Effective Date

01/01/1980

Tabset ID

K0ANNUALK0MIDPER

Tabs Detail ?

<

1-4 of 4

>

|

View All

Order	Tab Label		
10	Goals	+	-
20	Competencies	+	-
30	Overall Results	+	-
40	Employee Feedback	+	-

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 unavailable for entry 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 Performance Management Tile. On the left navigation, select **Performance Documents > Template Definition**.

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

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

Template Definition

General Process Tabs **Structure** Content

Document Type K0ANNUAL Document Type Description Annual Review
 Template ID K0MIDPER Effective Date 01/01/1980

Sections 1 of 7 [View All](#)

*Section Type Goals
 Tab Label ☐ Fluid Only Section ☒ Include in Define Criteria ☒ Include in Track Progress

Section

☒ Rate ☐ Preliminary Rating ☐ Weight
 Calculation Method Rating Model Rating Display
 Map Ratings
 Minimum Weight Weight
 *Special Processing

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

Items

☒ Enable Items
☒ Free-Form Allowed
☒ Rate
☒ Use Section Rating Model ☐ Target Rating
☐ Weight ☐ Minimum Weight
☐ Mandatory ☐ Critical
☒ Description ☐ Measures
☒ Due Date ☐ Reminder Date
☐ Ownership ☐ Stretch Goal
☐ Percentage Completed
☐ Level of Difficulty
☐ Supports
☒ Status
☐ Empl Measures
☐ Start Date
☐ Private - hide from employees
☐ End Date

Sub-Items

☒ Enable Sub-Items
☐ Free-Form Allowed
☐ Description

Profile Management

☐ Initialize from Profile

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

Define Criteria Step - Role Rules ⓘ

Role	Add Items	Update Items	Delete Items	Copy Objective Items	Copy Manager's Items	Copy from Another Document	Participant Feedback		
Employee ▼	☒	☒	☒	☐	☒	☐	☐	+	-
Manager ▼	☒	☒	☒	☐	☒	☐	☐	+	-

Track Progress Step - Role Rules ⓘ

Item	Rate/Comments	
Role		
Employee ▼	☒	+
Manager ▼	☒	+

Final Evaluation Step - Role Rules ⓘ

Rate/Weight	Section	Item	Edit	Profile Management	
Role	Rate Section	Rate Item	Exclude Item Rating	Rate Sub-Item	Exclude Sub-Item Rating
Employee ▼	☐	☒	☐	☐	☐
Manager ▼	☐	☒	☐	☒	☐

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](#).

Field or Control	Description
Section Type	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 Template Definition - 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.

Field or Control	Description
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 review process. Select the appropriate check boxes to grant the manager and employee permissions to add items, update items, delete items, copy objective items, copy manager's items, copy items from other documents and view participant feedback on the evaluation document when it's created.

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

(Overall Summary section only) All fields in this section are not editable. The Overall Summary section does not apply to the Defined Criteria step of the review process.

Field or Control	Description
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 unavailable for entry 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 editable if the section's special processing is <i>Business Objectives</i>, and available only to the <i>Manager</i> and <i>Employee</i> roles. See Copy from Business Objectives Page.
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: <i>Manager:</i> the user of this role can copy items from documents where he or she is the person to be evaluated. <i>Employee:</i> the user of this role can copy items from documents where his or her manager is the person to be evaluated. See Copy from Manager Document Page.

Field or Control	Description
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: <i>Manager</i>: the user of this role can copy items from any documents that he or she owns as a manager, regardless of document status. <i>Employee</i>: the user of this role can copy items from any of his or her previous documents. See Select a Document Page and Copy <section item> from My Documents or Copy <section item> from My Team's Documents Page.
Participant Feedback	Select this check box to enable managers to view completed participant (for example, users of <i>Peer</i> or <i>Other</i> roles) feedback directly on manager documents without any page transfer. This option is applicable to the <i>Manager</i> role only. It becomes available for editing if the Allow participant feedback at anytime option is enabled in the Nominate Participants section on the Template Definition - Process Page.

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 and employee permissions to add items, update items, delete items, copy objective items, copy manager's items, copy items from other documents, and view participant feedback 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.

(Overall Summary section only) The only editable field in this role rules section is **Section Comments**.

Field or Control	Description
Rate Section	Select to enable the role to assign a section rating. This option is available if the Rate option in the Section region is selected for the section. Note: This option is applicable to Fluid ePerformance only.
Rate Item	Select to enable the role to assign an item rating. This option is available if the Rate option in the Items region is selected for the section. Note: This option is applicable to Fluid ePerformance only.
Rate Sub-Item	Select to enable the role to assign a sub-item rating. This option is available if the Rate option in the Items region is selected for the section. Note: This option is applicable to Fluid ePerformance only.
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 section 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 several 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

Note: The **Rate** check box in the **Section** group box controls all options in the **Rate/Weight** tab. If the **Rate** check box is cleared, all options in this tab become cleared and read-only, with the exception of the **Employee Rating** option for the *Manager* role.

<i>Field or Control</i>	<i>Description</i>
Role	Select the role for which you are defining rules.
Rate Section	Select this check box to enable the role to assign a section rating. This option becomes editable if the Rate option in the Section group box is selected for the section.
Rate Item	Select this check box to enable the role to rate items in this section. This option becomes editable if the Rate option in the Items group box is selected for the section.
Exclude Item Rating	Select this check box to allow managers to exclude item ratings from the overall rating calculation of documents. This option is applicable to the <i>Manager</i> role in Fluid ePerformance only. It becomes editable if: • The Allow Managers to Exclude Item Ratings from Calculation option is selected on the Template Definition - General Page and • The Rate Item option is selected. This option is not editable if the Override Rating option or the Weight option in the Items group box is selected.
Rate Sub-Item	Select this check box to enable the role to rate sub-items in this section. This option becomes editable if: • The Enable Sub-Items option in the Sub-Items group box is selected for the section. • The Rate Item option is selected.

Field or Control	Description
Exclude Sub-Item Rating	Select this check box to allow managers to exclude sub-item ratings from the overall rating calculation of documents. This option is applicable to the <i>Manager</i> role in Fluid ePerformance only. It becomes editable if: • The Allow Managers to Exclude Item Ratings from Calculation option is selected on the <u>Template Definition - General Page</u> and • The Rate Sub-Item option is selected. This option is not editable if the Override Rating option or the Weight option in the Items group box is selected.
Rating Required	If the role can rate sections, items, or sub-items in this step, select this check box if you want to require the role to provide ratings at these levels. This option is selected and not editable for the <i>Manager</i> role. Note: This option is applicable to Fluid ePerformance only.
Override Rating	Select this check box to have the Override Rating button appear next to the Calculate button on the evaluation. The role can click this button to modify the calculated rating. Note: (Fluid ePerformance only) Use the rating display (<i>Drop-Down Box</i> or <i>Stars</i>) to override current ratings. This option becomes editable 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. Note: (Fluid ePerformance only) This option is not used. Employee rating, if shared, is always displayed in the manager document.

Field or Control	Description
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 becomes editable if the Rate option in the Section group box is selected for the section.
Weight Section	Select this check box to enable the role to assign a section weighting. This option becomes editable if the Weight option in the Section group box is selected for the section. The Weight option becomes editable if the Rate option is selected at the section level.
Weight Item	Select this check box to enable the role to weight items in this section. This option becomes editable if the Weight option in the Items group box is selected for the section. The Weight option becomes editable if the Rate option is selected at the item level.

Final Evaluation Step – Role Rules - Section

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

Final Evaluation Step - Role Rules ⓘ										
Rate/Weight	Section	Item	Edit	Profile Management ▶▶						
*Role	Comments	Employee Comments	Comments Required	Participant Feedback	Results Writer	Development Tips	Other Evaluator Comments	Notes		
Employee ▼	☒	☐	☐	☐	Not Used ▼	Not Used ▼	☐	☐	+	-
Manager ▼	☒	☐	☐	☐	Not Used ▼	Not Used ▼	☐	☐	+	-

Field or Control	Description
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.

Field or Control	Description
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 <i>Manager</i> role only; it becomes editable if the Comments option is selected for the <i>Employee</i> role. Note: (Fluid ePerformance only) This option is not used. Employee comment, if shared, is always displayed in the manager document.
Comments Required	If the role can provide comments for sections in this step, select this check box if you want to require the role to provide comments. Note: This option is applicable to Fluid ePerformance only.
Participant Feedback	Select this check box to enable managers to view completed participant (for example, users of <i>Peer</i> or <i>Other</i> roles) feedback directly on manager documents without any page transfer. Participant feedback, if available, can be displayed at the section, item and sub-item levels based on template setup. This option is available to the <i>Manager</i> role 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. Video: Consolidated Participant Feedback Display in Manager Evaluations

Field or Control	Description
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 becomes editable if the Comments check box is selected for the role. The available options are: • <i>Competency</i> Select to list the Results Writer statements that are associated with competencies. You associate statements with competencies on the Define Results Writer - Competency Page. • <i>Sub-Competency</i> Select to list the Results Writer statements that are associated with sub-competencies. You associate statements with sub-competencies on the Define Results Writer - Sub-Competencies Page. • <i>Not Used</i> Select if you do not want Results Writer suggestions to appear on the Suggested Results page.

Field or Control	Description
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 becomes editable if the Comments check box is selected for the role. The available options are: • <i>Competency</i> Select to list development tips that are associated with competencies. You associate development tips with competencies on the Link Development Tips - Competency Page. • <i>Sub-Competency</i> Select to list development tips that are associated with sub-competencies. You associate development tips with competencies on the Link Development Tips - Sub-Competencies Page. • <i>Not Used</i> Select if you do not want development tips to appear on the Suggested Results page.
Other Evaluator Comments	Select this check box to have comments that were entered by other evaluators appear on the Suggested Results page for the role. Only comments from completed evaluations that were entered for the same summary section appear on the list. This option becomes editable if the Comments check box is selected and the role is <i>Manager</i>.

Field or Control	Description
Notes	Select this check box to have performance notes that the employee or manager entered for documents appear as suggested results for the writing tool. Users can only see notes that were created by or transferred to them. In other words, the manager cannot see notes that were entered and owned by the employee. This option becomes editable if the Comments check box is selected for the role. See Also (Fluid ePerformance) Writing Suggestions - Performance Notes Page (Classic ePerformance) Writing Tools - Performance Notes Page

Final Evaluation Step – Role Rules - Item

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

Final Evaluation Step - Role Rules ⓘ

Rate/Weight	Section	Item	Edit	Profile Management						
*Role		Comments	Employee Comments	Comments Required	*Results Writer	*Development Tips	Other Evaluator Comments	Notes		
Employee ▼		☒	☐	☐	Not Used ▼	Not Used ▼	☐	☒	+	-
Manager ▼		☒	☒	☐	Not Used ▼	Not Used ▼	☐	☒	+	-

Field or Control	Description
Comments	Select this check box to have items in the section contain an area for users 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.

Field or Control	Description
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. Note: (Fluid ePerformance only) This option is not used. Employee comment, if shared, is always displayed in the manager document.
Comments Required	If the role can provide comments for items in this step, select this check box if you want to require the role to provide comments. Note: This option is applicable to Fluid ePerformance only.
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

If the **Define Criteria** or **Track Progress** step is enabled for users to set up evaluation criteria (through add, update, delete, and copy items) for use in documents, it is recommended that you do not enable these options in the **Evaluation** step. It is because adding or deleting items in the **Evaluation** step can cause out-of-sync issues between the manager document and the self-evaluation, unless the same item action is performed in both documents.

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

Final Evaluation Step - Role Rules ⓘ									
Rate/Weight	Section	Item	Edit	Profile Management	>				
*Role		Add	Update	Delete	Copy Objective Items	Copy Manager's Items	Copy from Another Document		
Employee ▼		☒	☒	☒	☐	☒	☐	+	-
Manager ▼		☒	☒	☒	☐	☒	☐	+	-

Field or Control	Description
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 editing 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 <i>Manager</i> and <i>Employee</i> roles.
Copy Manager's Items	Select this check box to enable the role to copy items from the manager's documents into the documents that are generated for the role. This option is available only to the <i>Manager</i> and <i>Employee</i> roles. <i>Manager:</i> if you add items to an employee's document as a manager, the Copy <item> from my Document option becomes available. Use this option to copy items from your own evaluations that match the criteria of the employee's document. <i>Employee:</i> if you add items to your own document as an employee, the Copy <item> from Manager Document option becomes available. Use this option to copy items from your manager's evaluation documents that match the criteria of your own document.

Field or Control	Description
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: <i>Manager:</i> if you add items to an employee's document as a manager, the Copy <item> from My Team's Documents option becomes available. Use this option to copy items from your team members' documents in which you are listed as the manager. <i>Employee:</i> if you add items to your own document as an employee, the Copy <item> from My Documents option becomes available. Use this option to copy items from other evaluation documents of yours.

Final Evaluation Step – Role Rules - Profile Management

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 ▼		☐			+ -

Field or Control	Description
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 option becomes editable if all these conditions are met: - The selected special processing in the Section section is either <i>Business Objectives</i> or <i>None</i>. - The Rate option is selected in the Items group box, and a content type is specified in the Content Type field of the same section. In order for the Rate option in the Items group box to be editable, the Rate option in the Section group box must already be selected. - 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 <i>Complete</i>. 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 <i>Complete</i>, meaning the manager evaluation status is in a <i>Complete</i> status and the document status at the header level is also <i>Complete</i>.
Person Profile Type	Select the profile type. These profile types are defined in the Manage Profiles business process with an Identity Option equal to <i>Person</i>. 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 <i>Manager</i>, <i>Nominee</i>, or <i>Self</i>.

Template Definition - Content Page

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

Navigation:

- (Fluid) Select the Performance Management Tile. On the left navigation, select **Performance Documents > Template Definition**.
- (Classic) **Set Up HCM > Product Related > ePerformance > Document Structure > Template Definition > Template Definition - Content**

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.

<i>Field or Control</i>	<i>Description</i>
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.

Field or Control	Description
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 <i>Advanced</i>, <i>Basic</i>, or <i>Intermediate</i>. Since the values come from the Content Catalog, it follows the same rules as other evaluation criteria fields such as Description and Measurements. To edit the field, select the Edit icon on the document. 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.

Field or Control	Description
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.

Field or Control	Description
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 <i>Employee</i> or <i>Manager</i> 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. When selected, this item cannot be deleted from documents that are created using this template. Also, specific attribute information of the item, such as due date and target rating, is read-only and cannot be edited. 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 <i>Critical</i> 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.

Field or Control	Description
Sub-Item ID	To include a sub-item from the prompt table (typically, a sub-competency) in this section of the document, select the sub-item 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.

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

Load Content From Profile

Search for Content

Content Type

Competencies

Profile Type

Job

Profile ID

100000

Search

Clear

Select Items

	Item ID	Title
☐	K2	Teaching Skills
☐	K3	Mentors Students

Select All

Deselect All

Add Item

Return to Previous 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

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

Clone Template Definition

Document Type	K0ANNUAL	Annual Review
Template ID	K0MIDPER	Annual with Mid-Period
Effective Date	01/01/1980	

Effective Date

New Document Type

New Template ID





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 *Objectives Management Setup* (HCCPEP1200). 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* 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

<i>Page Name</i>	<i>Definition Name</i>	<i>Usage</i>
<u>Objective Plan Page</u>	EPO_OBJ_PLAN	Define at a high level a year or the name of a plan to which you want to link objective pages.
<u>Objective Section Definition Page</u>	EPO_SECTN_DEFN	Define the sections that you want to include on the Objective Template Definition page.
<u>Objective Template Definition - General Page</u>	EPO_TMPL_DEFN	Define the layout of the Objective pages.
<u>Objective Template Definition - Sections Page</u>	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 > Set Up Objective Plan > Set Up Objective Plan

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

Objective Plan

Objective Plan 2023

Objective Plan Detail ?

*Status Active ▾

*Description 2023 Business Objectives

Short Description 2023 BusOb

*Begin date 07/01/2022

*End Date 12/31/2023

*Hierarchy Method Department ▾

Department Hierarchy SetIDs ?

*Set ID	*Tree Name		
SHARE	DEPT_SECURITY		

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

Field or Control	Description
Status	Select the status of the objective plan. The values are <i>Active</i> and <i>Inactive</i> . The default is <i>Active</i> .
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.

<i>Field or Control</i>	<i>Description</i>
Hierarchy Method	Select either <i>Department</i> or <i>Position</i> . If you select <i>Department</i> , the system displays a group box that allows you to enter setIDs and tree names that are associated with the department.

Department Hierarchy SetIDs

<i>Field or Control</i>	<i>Description</i>
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

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

Objective Section Definition

Section Type K-LOYAL

Section Definition Detail

Effective Date 01/01/1980  *Status Active   

*Description Customer Loyalty

Short Description Loyalty

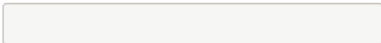
Items

☒ Enable Items
☒ Free-Form Allowed
☒ Description
☒ Measures
☐ Percentage Completed
☐ Item Status
☐ Due Date
☒ Align Items

Content Type Business Objectives 
[Define Content Group](#)
Status Definition 
Aligned To Customer Loyalty 

Sub-Items

☐ Enable Sub-Items
☐ Free-Form Allowed
☐ Description

Sub-Item Label 
Content Type 

<i>Field or Control</i>	<i>Description</i>
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 <i>Active</i> and <i>Inactive</i> . The default is <i>Active</i> .
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

Field or Control	Description
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.

Field or Control	Description
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 <i>Any Section</i> to align items to any section on objective pages.

Sub-Items

Field or Control	Description
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

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

Objective Template Definition

General
Sections

Objective Template
KCORP

Objective Template Definition

Q

|

<<

<

1 of 1

>

>>

|

View All

*Effective Date
01/01/2000

*Status
Active

+
-

*Description
Corporate Objectives Template

Short Description
Corporate

Page Details

Default Title
2023 Business Objectives

☒ Add Dept/Postion to Title

☒ Enable Comments Switch

Employee Photo Details

☒ Display Photo
☒ Display Name
☒ Display Job Title

Page Display

*Display Type
Long Format Only

Field or Control	Description
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 <i>Active</i> and <i>Inactive</i> . The default is <i>Active</i> .
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

<i>Field or Control</i>	<i>Description</i>
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 <i>Corporate Accounting</i> would be <i>2023 Business Objectives for Corporate Accounting</i> .
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

<i>Field or Control</i>	<i>Description</i>
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” (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 Human Resources Administer Workforce).
Display Job Title	Select to enable a space for the title of the person in the picture.

Page Display

Field or Control	Description
Display Type	Select how the Business Objectives page should be displayed. Values are: Note: Fluid Business Objectives only supports the <i>Long Format Only</i> option. <i>Long Format Only:</i> (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. <i>Tabs Format Only:</i> Page is displayed in sections as represented by tabs. <i>Toggle - Default Long:</i> Page is displayed in long format by default and users can toggle between long and tabbed format. <i>Toggle - Default Tabs:</i> Page is displayed in tabbed format by default 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

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

Objective Template Definition

[General](#)
[Sections](#)

Objective Template KCORP

Objective Template Definition

1 of 1

Effective Date

01/01/2000

Status

Active

Description

Corporate Objectives Template

Short Description

Corporate

Sections

1 of 3

*Section

Customer Loyalty

*Display Order

10

Items

☒ Enable Items
 ☒ Free-Form Allowed

Content Type

Business Objectives

Define Content Group

☒ Description
 ☒ Measures
 ☒ Percentage Completed
 ☒ Item Status

Status Definition

OBJECTIVE STATUS

☒ Due Date
 ☒ Align Items

Aligned To

Any Section

Sub-Items

☒ Enable Sub-Items
 ☒ Free-Form Allowed

Sub-Item Label

☒ Description

Content Type

Goals and Objectives

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Sections

Field or Control	Description
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 incrementing the highest value by tens.
Tab Label	Select the tab in which this section displays on the Business Objectives page. This field appears if the selected display type is <i>not Long Format Only</i>.

Items

Field or Control	Description
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.

Field or Control	Description
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 defined in the system. You can set up additional prompt lists for this field in Profile Management (Set Up HCM > Product Related > Profile Management > Profiles > Custom 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 <i>Any Section</i> to align items to any section on objective pages.

Sub-Items

Field or Control	Description
Enable Sub-Items	When you select this check box, the other fields in this page region are enabled.

Field or Control	Description
Sub-Item Label	Specify the label used to name sub-items in this section, if applicable.
	Note: This field applies to Fluid Business Objectives only.
	It becomes editable when the Enable Sub-Items field is selected.
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
ePerformance Installation - Objective Pages Page	EP_INSTALL_OBJ	Configure system settings and email notification setup for Business Objectives.

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.

Note: Oracle PeopleSoft delivers Notification Composer Framework to manage the setup and administration of all notifications in one central location.

Once you have adopted the Notification Composer feature, you must use it to create new notifications and manage your existing notifications.

Notifications delivered with HCM Image 47 or later must use Notification Composer.

For more information about Notification Composer Framework, see “Understanding Notification Composer” (Enterprise Components).

ePerformance Installation - Objective Pages Page

Use the ePerformance Installation - Objective Pages page (EP_INSTALL_OBJ) to configure system settings and email notification setup for Business Objectives.

Navigation:

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

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

ePerformance Installation

ePerformance

Objective Pages

Last Page ID

54

Last Objective Item ID

318

Configure e-Mail Notifications

☒ Notify owner when page is created
 ☒ Notify new owner when page has been transferred
 ☒ Notify old owner when page has been transferred
 ☒ Notify administrator when page is submitted for publication
 ☒ Notify page owners when page has been published

☒ One notification per publication process

☒ Notify direct/indirect reports when page has been published

☒ One notification per publication process

☒ Notify only on first publication
 ☒ Notify Employee when Objective Item is cascaded to their document
 ☒ Notify Manager when Objective Item is cascaded to their document

Fluid Settings

☒ Allow Managers or Alternate Editors to create documents
 ☒ Allow Alternate Editor to select document owner
 ☒ Allow Managers or Alternate Editors to publish documents

☒ Notify Administrator when a document is published

☒ Allow Managers or Alternate Editors to cascade items

☒ Notify Administrator when items are cascaded

Field or Control	Description
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.

Configure e-Mail Notifications

Field or Control	Description
Notify owner when page is created	Select to send notifications to business objective owners when business objective pages (or documents) are created with assigned owners.
Notify new owner when page has been transferred	Select to send notifications to new owners to whom business objective pages (or documents) have been transferred.
Notify old owner when page has been transferred	Select to send notifications to old owners from whom business objective pages (or documents) have been transferred.
Notify administrator when page is submitted for publication	Select to send notifications to administrators when business objective pages (or documents) are ready and waiting for them to publish.
Notify page owners when page has been published	Select to send notifications to owners when their business objective pages (or documents) have been published. 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 each recipient, even if there are multiple pages (or documents) in the process for which they could be notified.

Field or Control	Description
Notify direct/indirect reports when page has been published	Select to send notifications to employees when business objective pages (or documents) have been published. These employees are direct and indirect reports who have access to the published pages. Typically these individuals will need to update their ePerformance documents 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 each recipient, even if there are multiple pages in the process for which they could be notified.
Notify only on first publication	Select to send notifications to recipients only on the first publication of the business objective pages (or documents).
Notify Employee when Objective Item is cascaded to their document	Select to send notifications to employees when objective items have been cascaded down to their performance documents.
Notify Manager when Objective Item is cascaded to their document	Select to send notifications to managers when objective items have been cascaded down to the performance documents of their employees.

Fluid Settings

These settings are applicable to Fluid Business Objectives only.

Field or Control	Description
Allow Managers or Alternate Editors to create documents	Select to provide managers or alternate editors the ability to add new business objective documents for employees. If selected, the Create Document link becomes available on the Business Objectives Page .
Allow Alternate Editor to select page owner	Select to allow alternate editors to specify the owners when creating business objectives documents on the New Business Objective Document Page .
Allow Managers or Alternate Editors to publish documents	Select to allow managers or alternate editors to publish business objective documents. See Business Objectives Document Page .

Field or Control	Description
Notify Administrator when a document is published	Select to send notifications to administrators when business objective documents are published by managers. This option becomes editable when the Allow Managers or Alternate Editors to publish documents option is selected.
Allow Managers or Alternate Editors to cascade items	Select to allow managers or alternate editors to cascade objective items from business objective documents to performance documents. Managers can cascade items at the document section level on the Cascade Items Page.
Notify Administrator when items are cascaded	Select to send notifications to administrators when objective items are cascaded to performance documents by managers. This option becomes editable when the Allow Managers or Alternate Editors to cascade items option is selected.

Setting Up Business Objectives To Work With Performance Documents

In ePerformance, you can set up the system to enable the insertion of business objectives as items in performance documents, as well as align performance document items to business objectives.

Use this topic to review the steps involved to set up business objectives and performance documents to support business objective features in performance documents. This topic:

- Provides an overview of the *closest business objective page*, what it means for an employee in terms of aligning business objectives with items in the employee's performance document.

See [The Closest Business Objective Page](#).

- Lists key points when discussing steps for setting up business objectives and performance documents to support the adding of business objectives to performance documents as items, and the alignment of performance document items to business objectives.

The order of sections listed in this topic is the recommended order in which the corresponding steps should be performed. Set up business objectives first. Publish business objective documents and then create and update performance documents.

See [Setting Up Business Objectives](#) and [Setting Up ePerformance Documents](#).

- Includes added functionality in Fluid that enables managers to create, manage, and publish business objective documents for their teams, as well as cascade business objectives to their team documents using the **Business Objectives** tile in Fluid Manager Self-Service.

Employees can view published business objectives to which they have access using the **View Business Objectives** tile in Fluid Employee Self-Service.

See Also [\(Fluid\) Accessing Business Objective Tiles and Document Lists](#).

Important! *Business objective documents* is a new term introduced in Fluid and is the same as *business objective pages* or *objective pages*. These terms are used interchangeably in this topic.

The Closest Business Objective Page

The concept of the closest page is used to find the default objectives for an employee. It will be the objective page directly above them in the hierarchy.

1. If the department or position that the person is in has an objective page, then that will be their closest page. If not, then the system will use the department tree or position data, depending on the hierarchy defined, to climb up one level at a time until a published objective page is found.
2. Page owners are the individuals assigned to assemble business objectives for a given department or position. This group includes alternate editors since they too have access to update objective pages.
3. Page owners (and administrators) have access to published and non-published business objective pages.
4. Employees and managers who are not page owners have view-only access to published objective pages only.
5. If a business objective page is inactive, the system will bypass this page when looking for the closest page and climb up the hierarchy. In the chart to view other objective pages in the hierarchy, the **Business Objectives** link will not be displayed.
6. If a business objective page is not published, the system will stop climbing the hierarchy when looking for the closest page and display a message stating that the default page is not yet published.
7. If a business objective page is locked, the page owner or administrator cannot make any updates to the page. In the chart, the **Business Objectives** link is still displayed. Locked pages cannot be reassigned to a different owner or transferred.

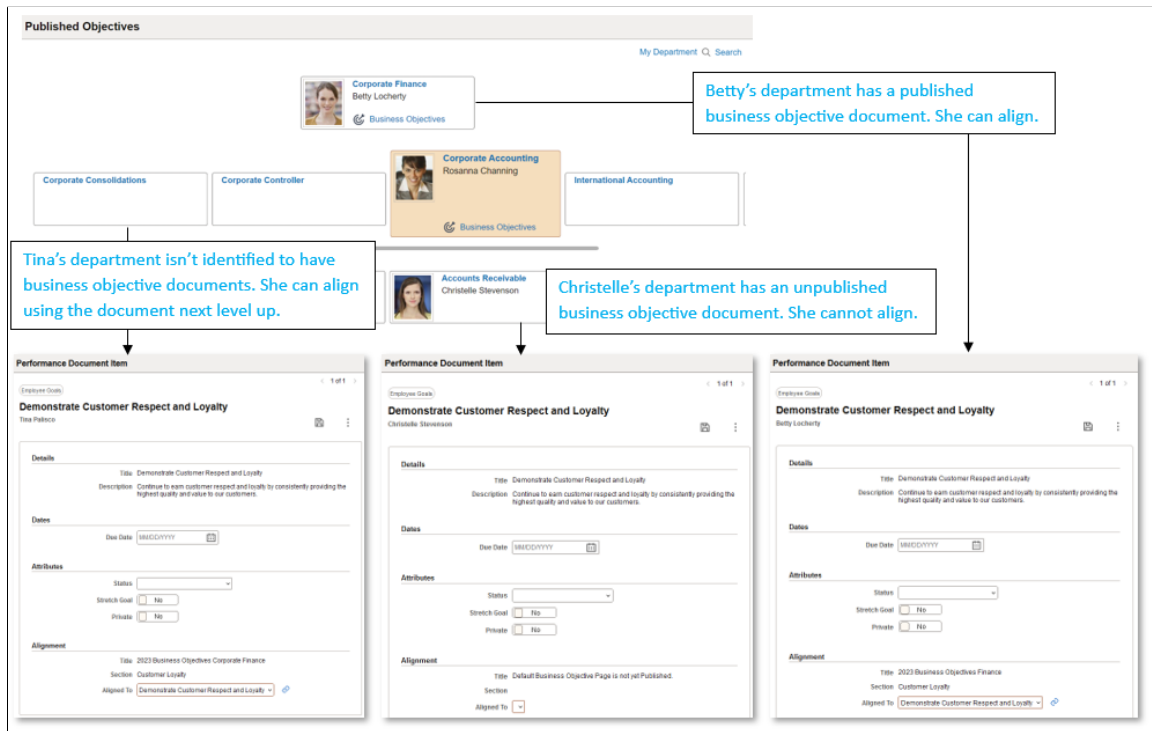
Review this example to see how the system determines if performance document items can be aligned to business objectives. Suppose that in Betty's organization:

- Betty's department (Corporate Finance) has a published business objective page.
- Tina is Betty's direct report. Her department (Corporate Consolidations) is not identified to have business objective pages. No business objective page is available.
- Rosanna is Betty's direct report. Her department (Corporate Accounting) has a published business objective page.
- Christelle is Rosanna's direct report. Her department (Accounts Receivable) has an unpublished business objective page.

Assuming that the setup for business objectives and performance documents to support alignment is completed:

- Items from Betty's performance document can align with business objectives from the closest page, which is available in her department. Same with Rosanna.
- Items from Tina's performance document can align with business objectives from the closest page, which is available in the department one level above hers.
- Items from Christelle's performance document cannot be aligned. Her department has an unpublished page and the system is unable to identify the closest page for alignment.

This image illustrates examples of business objective alignment in performance documents based on the presence of the closest business objective page.



Setting Up Business Objectives

Review this information when setting up business objectives.

1. Determine the Hierarchy Structure

Decide on the hierarchy structure that will be used to determine the reporting structure of your business objectives. The hierarchy can be position or department. The objective pages will be created using data from either position data or a department tree.

1. Position:

To use the position hierarchy, the **Position Number** and **Reports To** fields in the Job Data component need to be populated for all employees in your population.

2. Department:

To use the department hierarchy, you need to define a tree with the Structure ID = *Department*. The tree needs to be active in Tree Manager.

This example illustrates the Tree Definition and Properties page.

Tree Manager

Tree Definition and Properties

*Tree Name

*Structure ID Q

*Effective Date 📅

*Status

Active

▼

*Description

*Category Q

*Use of Levels

Strictly Enforced

▼

Performance Options

*Set ID Q

Audits

☐ All Detail Values in this Tree
☐ Allow Duplicate Detail Values

Item Counts

Node Count
0

Leaf Count
0

Level Count
0

Branch Count
0

Note: (For performance documents) The Department tree structure needs to match the reporting hierarchy used by the performance documents if you want to align and copy business objectives to the performance documents.

See Also “(Fluid) Updating Job Data” (PeopleSoft Human Resources Administer Workforce) and “Setting Up and Assigning Tree-Based Data Permission” (Application Fundamentals).

2. Define Objective Plans

New objective plans are typically defined yearly.

Objective plans are based upon department tree or position data.

If *Department* is used as the hierarchy method, specify the set ID and the department tree to be used on the [Objective Plan Page](#).

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This example illustrates the Objective Plan page.

Objective Plan

Objective Plan 2023

Objective Plan Detail ?

*Status Active

*Description 2023 Business Objectives

Short Description 2023 Busin

*Begin date 07/01/2022

*End Date 12/31/2023

*Hierarchy Method Department

Department Hierarchy SetIDs ?

*Set ID	*Tree Name		
SHARE	DEPT_SECURITY	+	-

3. Define Objective Sections

Note that:

1. In order to copy business objectives to performance documents as items, the content type on the business objective section setup must be the same as the content type on the performance document section setup.
2. The **Aligned To** field on the Objective Section Definition Page shows all business objective sections that are active, plus the *Any Section* value which will allow alignment to any section on the business objective page above in the hierarchy.
3. *Recommendation:* Use *Any Section* unless you need to tightly align content.

This example illustrates the Objective Section Definition page.

Objective Section Definition

Section Type K-PROFIT

Section Definition Detail

Effective Date

01/01/1980

*Status

Active

+ -

*Description

Profitability

Short Description

Profit

Items ?

☒ Enable Items

☒ Free-Form Allowed

☒ Description

☒ Measures

☐ Percentage Completed

☐ Item Status

☒ Due Date

☒ Align Items

Content Type

Business Objectives

Define Content Group

Status Definition

Aligned To

Any Section

4. Objective Template Definition

Note that:

1. If you want to automatically populate the page title with the department or position name, select the **Add Dept/Position to Title** check box on the Objective Template Definition - General Page. This name will be appended to whatever is specified in the **Default Title** field.
2. *Recommendation:* Use a separate template to create the business objective page for the top node of the hierarchy. The **Align Items** field on the Objective Template Definition - Sections Page for this template should be blank since there aren't any business objectives pages above this node to align to.

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This example illustrates the Objective Template Definition - Sections page.

Objective Template Definition

General

Sections

Objective Template KCORP

Objective Template Definition

Effective Date

01/01/2000

Status

Active

Description

Corporate Objectives Template

Short Description

Corporate

Sections

Search

1 of 1

View All

Effective Date

01/01/2000

Status

Active

Description

Corporate Objectives Template

Short Description

Corporate

Sections

Search

1 of 3

View All

*Section

Customer Loyalty

*Display Order

10

+

-

Items

Enable Items

Free-Form Allowed

Description

Measures

Percentage Completed

Item Status

Due Date

Align Items

Content Type

Business Objectives

Define Content Group

Status Definition

OBJECTIVE STATUS

Aligned To

5. Identify Objective Nodes

Note that:

1. You must identify the departments or positions that will have business objective pages on the Identify Business Objective Nodes Page prior to creating them.
2. *Recommendation:* Only identify departments or positions that will have published pages. If some pages are identified, and not published, the hierarchy will not be able to climb beyond the unpublished pages.

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This example illustrates the Identify Business Objective Nodes page.

Identify Business Objective Nodes

Enter search criteria to find the Departments that will have Business Objectives and then select Search.

Objective Plan 2023 2023 Business Objectives

Search Criteria

Set ID

Department

Select the checkbox to indicate that the department will have business objectives.

Target Department

Select	Department	Description	Manager Name	Drill Up	View Chart
☒	13000	Finance and Administration	Jean Parsons	Drill Up	

Select any children that will also have business objectives.

Direct Reports

1-6 of 6

Select	Department	Description	Manager Name	Drill Down
☒	11000	Information Systems	Calvin Roth	Drill Down
☒	13100	Corporate Finance	Betty Locherty	Drill Down

6. Create Business Objectives

Note that:

- Recommendation:* To avoid page owners from having access to unpublished objective pages and accidentally aligning before the page is complete, create the pages one level at a time, starting from the top of the organization. Complete and publish the pages for that level before creating pages and assigning page owners for the next level.
- Recommendation:* (For Administrators) Select the **Set Owner to Department Manager** (or **Set Owner to Position Manager**) check box when creating the pages. If you do not select this check box, or no department (or position) manager exists for the department (or position) you are creating, then you will need to manually assign the owner when you need to transfer the page. An owner must exist prior to publishing the page.
- Department or position prompt will only include the departments or positions that have been selected on the Identify Business Objective Nodes page.
- Both administrators and managers can create business objective pages.
 - (For Administrators) Publication due date, template, and department (or position number) are required on the [Create Business Objectives Page](#).

Check the confirmation page messages to verify the pages were created and whether or not the owner was assigned.

This example illustrates the Create Business Objectives page for administrators.

Create Business Objectives

Complete the information in the *Home Page Creation Details* section.
Once the creation details have been chosen, select the **Create Page** pushbutton to generate the objective page(s).

Home Page Creation Details

Objective Plan 2023 Business Objectives

Effective Date 04/10/2024 

Template 

Publication Due Date 

☐ Set Owner to Department Manager

Department Selection







1-1 of 1 




Set ID	Department ID	Department Name		
				

Create Objective Pages

- (For Fluid Manager Self-Service) Create business objective documents for themselves or as alternate editors on the [New Business Objective Document Page](#).

A banner message is shown briefly confirming the creation of the document, which is now ready for update.

This example illustrates the New Business Objective Document page for managers.

Create Document

* Indicates required field

New Business Objective Document

Cancel

Create

Role

Create Document ☒ For Self ☐ As Alternate Editor

Objective

*Plan

*Effective Date

04/04/2024

*Template

Document

*Title

*Publication Due Date

MM/DD/YYYY

Comments

Ownership

Owner Name

Betty Locherty (You)

Owner Title

Finance Director

Alternate Editor

Add

7. Manage Business Objectives

Owners, alternate editors, and the administrator can view and update the objective pages.

1. Once an objective page has been published, the next time you want to update the page, you will be prompted for a new effective date. If the most recent effective dated row is dated today, then you can either reopen that row, or add a new future-dated row.

Note: Future-effective dated rows cannot be submitted for publication (or subsequently published), until on or after that date.

- (For Administrators)

This example illustrates the Update Objectives page for administrators to reopen published business objective pages for edit.

Update Objectives

Department 13111 - Accounts Payable

The most current business objectives, effective as of today, have already been published. To reopen these objectives, select the Reopen button or enter a future effective dated date in the effective date field.

Note: Pages with future effective dates cannot be submitted for publication until on or after the new effective date.

☒ Re-open the latest published page
☐ Add a new effective dated page: 03/12/2024

OK Cancel

- (For Fluid Manager Self-Service)

This example illustrates the Update modal page for managers to reopen published business objective documents for edit.

Business Objectives Document

Published

2023 Business

Accounts Payable • Edm

Document Details

Document cannot be

Update

To update this document, you can reopen the current published document, effective as of today, or set a future effective date.

Note: Documents with future effective dates cannot be submitted for publication until on or after the new effective date.

☒ Reopen the current published document
☐ Set a future effective date

Cancel Save

Update

2. Setting the **Alternate Editor** field will allow an additional person to update the objective page. The alternate editor must have the permission list for ePerformance Manager.

- (For Administrators)

This example illustrates the Update Objectives page for administrators to edit business objective pages.

Update Objectives

Department 13100 - Corporate Finance

Department
13100 - Corporate Finance

Period
07/01/2022
To
12/31/2023

Objective Plan
2023
2023 Business Objectives

Template ID
KCORP
Corporate Objectives Template

Effective Date
08/19/2023

Status
In Progress - Assigned

Title
2023 Business Objectives Corporate Finance

Objectives Owner
KU0007
Betty Locherty

Owner Title
Finance Director

Alternate Editor

Comments

Save
Cancel
Preview
Submit For Publication
View Different Objectives

- (For Fluid Manager Self-Service) Use the **Document Details** link on the document page to add new, edit or remove the alternate editor.

This example illustrates the Business Objectives Document page for managers to review and update documents.

Business Objectives Document

In Progress - Assigned

2023 Business Objectives Corporate Finance

Corporate Finance • Betty Locherty

Document Details

Document is not visible to others until published.
Publish

Customer Loyalty

This example illustrates the Document Details page for managers to review document ownership.

Document Details

In Progress - Assigned

2023 Business Objectives Corporate Finance

Corporate Finance • Betty Locherty

Cancel Save

Objective

Plan 2023 Business Objectives

Period: 01 July 2022 - 31 December 2023

Effective Date 08/19/2023

Department Corporate Finance

ID: 13100

Template Corporate Objectives Template

Document

*Title 2023 Business Objectives Corporate Finance

Publication Due Date 12/31/2023

Comments

Ownership

Owner Name Betty Locherty

Owner Title Finance Director

Alternate Editor [Add](#)

3. View other published business objectives in the hierarchy.
 - (For Administrators) The **View Different Objectives** link is used to view the objectives chart.

Only objective pages that have never been published can be deleted by the administrator.

This example illustrates the Search for Business Objectives page.

- (For Fluid Manager Self-Service) Use the **More Actions** menu (document level) > View Published Objectives to view other published business objective documents in the hierarchy.

Managers cannot delete business objective documents.

This example illustrates the Published Objectives page.

4. Use the **Edit** icon and then the **Aligned To** field to get business objectives from the department or position directly above the page you are currently on. The system will only allow alignment to the items from the section(s) defined in the template.
- (For Administrators)

This example illustrates the Update Objectives page for administrators to edit business objectives.

Update Objectives

Edit Customer Loyalty

You can edit the details. When you are finished, select the Update button to save your entry.

Display Order	1
Title	Demonstrate Customer Respect and Loyalty
Description	Continue to earn customer respect and loyalty by consistently providing the highest quality and value to our customers.
Measurement	Maintain an average score of Exceeds Expectations on the quarterly customer loyalty surveys.
Due Date	 (example 12/31/2000)
Status	
Percent Complete	

Align Customer Loyalty to Business Objectives

Title	2023 Business Objectives Finance
Section	Customer Loyalty
Aligned To	Demonstrate Customer Respect and Loyalty  

 This Objective was modified on 2023-08-19

[Return To Objective Page](#)

- (For Fluid Manager Self-Service)

This example illustrates the Edit Items page for managers to edit business objectives.

Edit Items

Customer Loyalty

1 of 1

Demonstrate Customer Respect and Loyalty

Pre-defined • 1 Customer Loyalty Goals

Objective

Title

Demonstrate Customer Respect and Loyalty

Description

Continue to earn customer respect and loyalty by consistently providing the highest quality and value to our customers.

Measurement

Maintain an average score of Exceeds Expectations on the quarterly customer loyalty surveys.

Due Date

MM/DD/YYYY

Status

Percent Complete

Align Customer Loyalty to Business Objectives

Title

2023 Business Objectives Finance

Section

Customer Loyalty

Aligned To

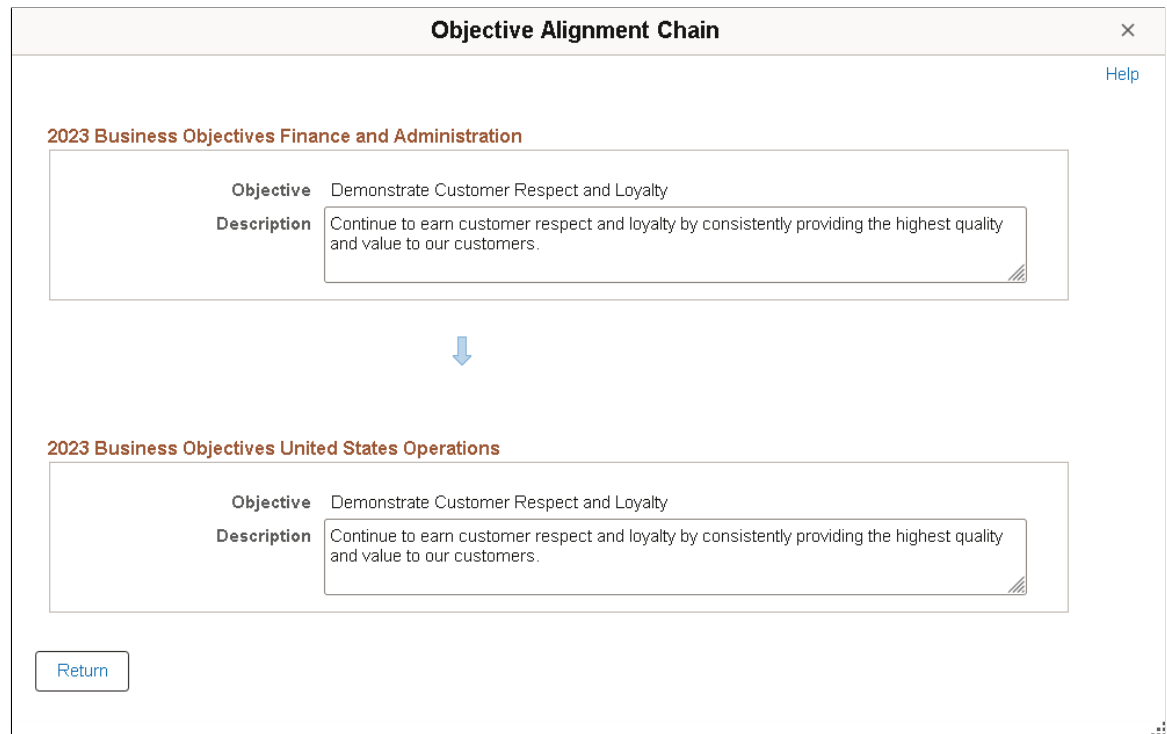
Demonstrate Customer Respect and Loyalty

Info

Chain

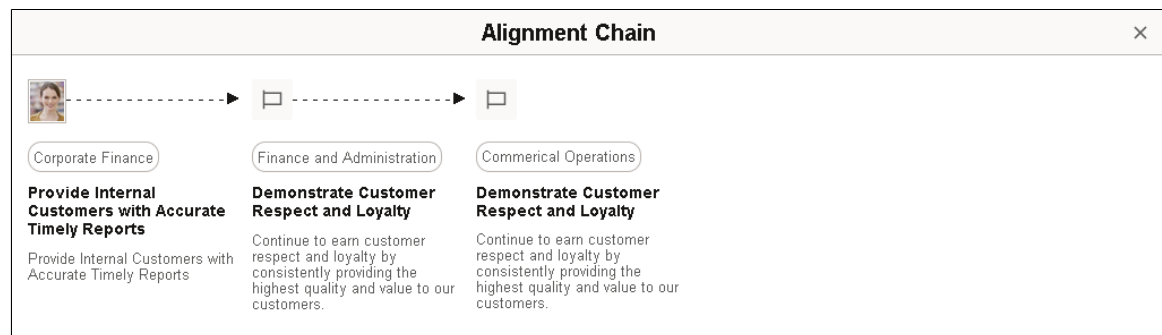
5. The **Info** icon next to the **Aligned To** field displays item details.
6. The **Chain** icon next to the **Info** icon displays the alignment of the item, with the progression showing the departments/positions that the item is aligned to.
 - (For Administrators) The objective page you're on is displayed at the top of the chain page. The aligned node at the top of the organization is displayed at the bottom of the chain page.

This example illustrates the Objective Alignment Chain page.



- (For Fluid Manager Self-Service) The objective page you're on is displayed on the left of the chain page. The aligned node at the top of the organization is displayed on the right of the chain page.

This example illustrates the Alignment Chain page.



7. (For Administrators only) The alert icon, which displays beneath the **Aligned To** item on the main and edit pages, signifies whether the item has been updated since it was aligned to this business objective page.

Green means the aligned item is still active and has not been updated since alignment.

Yellow means that the item is still active but has been updated since it was aligned. You may want to recheck the item.

Red signifies that the item is now inactive, and you should change the alignment to an active item. When inactive, text will also display next to the item title.

8. (From the Workforce Development menu) The page owner must use the **Submit for Publication** button to submit the business objective page to the administrators for publication. If modifications are made to the page after it has been published, the page must be submitted to the administrator again for publication.

(For Fluid Manager Self-Service) If enabled, managers (owners or alternate editors) can publish business objective documents as well as submit documents to the administrator for publication. For more information, see the *Publish Business Objective* section in this topic.

9. The **View History** drop-down (for administrators) or the **View History** button (for Fluid Manager Self-Service, next to the **Save** button on the document page) is available when there is more than one effective-dated row. Selecting a date value will open a new window to display the history.
10. If you delete an item from a published business objective page (update by adding a new effective-dated row), then the item will be inactivated instead of deleted. It can be reactivated. If an item is deleted before first publication, then the item is truly deleted.
 - (For Administrators) Reactivate using the add item functionality.

This example illustrates the Add an Item page for administrators to reactivate inactive business objectives.

[Update Objectives](#)

Add an Item

You have chosen to add a new Employee Commitment.

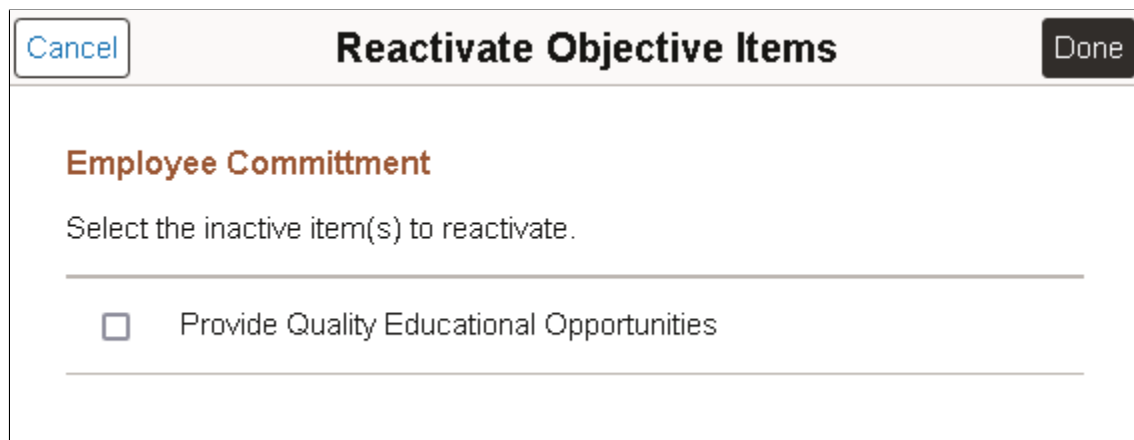
You can either enter a new Employee Commitment on your own or choose a Employee Commitment already defined in the system. When you are finished, select the Next button to continue.

☐ **Add pre-defined item**
☐ **Add your own Item**
☐ **Reactivate Inactive Items**

[Return To Objective Page](#)

- (For Fluid Manager Self-Service) Reactivate using the **More Action** menu (section level) > Reactivate Items.

This example illustrates the Reactivate Objective Items page for managers.



Reactivate Objective Items

Employee Commitment

Select the inactive item(s) to reactivate.

☐ Provide Quality Educational Opportunities

See Also [\(Classic\) Managing Business Objectives](#) and [\(Fluid\) Working With Business Objective Documents](#).

8. Assign or Transfer Business Objectives

Note that:

1. You can only assign an owner to business objective pages that are currently without an owner (status = *In Progress - Unassigned*).
2. Business objective pages must have an owner before they can be published.
3. When transferring a business objective page to a new owner on the [Assign/Transfer Business Objectives Page](#):
 - A new effective-dated row is added if the business objective page is published.
 - The current row is updated if the business objective page is not yet published.

This example illustrates the Assign/Transfer Business Objectives page.

Administer Business Objectives

[New Window](#) | [Help](#)

Assign/Transfer Business Objectives

Select the action you would like to perform along with any other required information. Depending upon the action selected the Status field may not be available.

Objective Plan 2023 2023 Business Objectives

Action

Search Criteria

Set ID

Department

Objectives Owner

Status

9. Publish Business Objectives

Note that:

1. Business objective pages must be published to be used on performance documents.
2. *Recommendation:* Publish all business objective pages prior to working on the performance documents. Features to copy items from business objectives and align items with business objectives cannot be utilized until the closest business objective page in the hierarchy is published.
3. Both administrators and managers can publish business objectives pages.
 - (For Administrators) Business objective pages must be in the *Ready to Publish* status to be available for publication on the Publish Business Objectives - Select Page to Publish Page.

This example illustrates the Publish Business Objectives page used by administrators to publish business objective documents.

Publish Business Objectives

Select Page to Publish

Enter search criteria to find the objective pages that you want to publish. Select the checkbox next to each page you want to publish and then select the Continue button.

Objective Plan 2023 2023 Business Objectives

Search Criteria

Set ID:

Department:

Status:

Business Objectives

Select	Title	Set ID	Department Description	Status	Objectives Owner	Update Objectives	View Objectives
☐	2023 Business Objectives Corporate Accounting	SHARE	Corporate Accounting	Ready to Publish	Rosanna Channing	Update	View

Select All Deselect All

- (For Fluid Manager Self-Service) Feature is available when the option to allow managers (page owners or alternate editors) to publish business objective documents is enabled on the ePerformance Installation - Objective Pages Page.

Managers can publish *In Progress - Assigned* business objective documents of which they are the owner or alternate editor, and the documents have never been published.

This example illustrates the Publish button on the Business Objectives Document page that managers can use to publish their business objective documents.

Business Objectives Document

In Progress - Assigned

2023 Business Objectives Corporate Accounting

Corporate Accounting • Rosanna Channing

[Document Details](#)

> **Customer Loyalty**

> **Profitability**

> **Employee Commitment**

[↑ Back to Top](#)

Note: The **Publish** button is not available to managers when they update *In Progress - Assigned* business objective documents that were once published. They must use the **Submit For Publication** button to submit the documents to be republished by the administrator.

4. Use the ePerformance Installation - Objective Pages Page to select when the system sends notifications regarding the publication of business objectives.

To provide managers the ability to publish their business objectives in Fluid Manager Self-Service, select **Allow Managers or Alternate Editors to publish documents** and the associated notification option (if desired).

This example illustrates the ePerformance Installation - Objective Pages page.

ePerformance

Objective Pages

Last Page ID

58

Last Objective Item ID

332

Configure e-Mail Notifications

☒ Notify owner when page is created

☒ Notify new owner when page has been transferred

☒ Notify old owner when page has been transferred

☒ Notify administrator when page is submitted for publication

☒ Notify page owners when page has been published

☒ One notification per publication process

☒ Notify direct/indirect reports when page has been published

☒ One notification per publication process

☒ Notify only on first publication

☒ Notify Employee when Objective Item is cascaded to their document

☒ Notify Manager when Objective Item is cascaded to their document

Fluid Settings

☒ Allow Managers or Alternate Editors to create documents

☒ Allow Alternate Editor to select document owner

☒ Allow Managers or Alternate Editors to publish documents

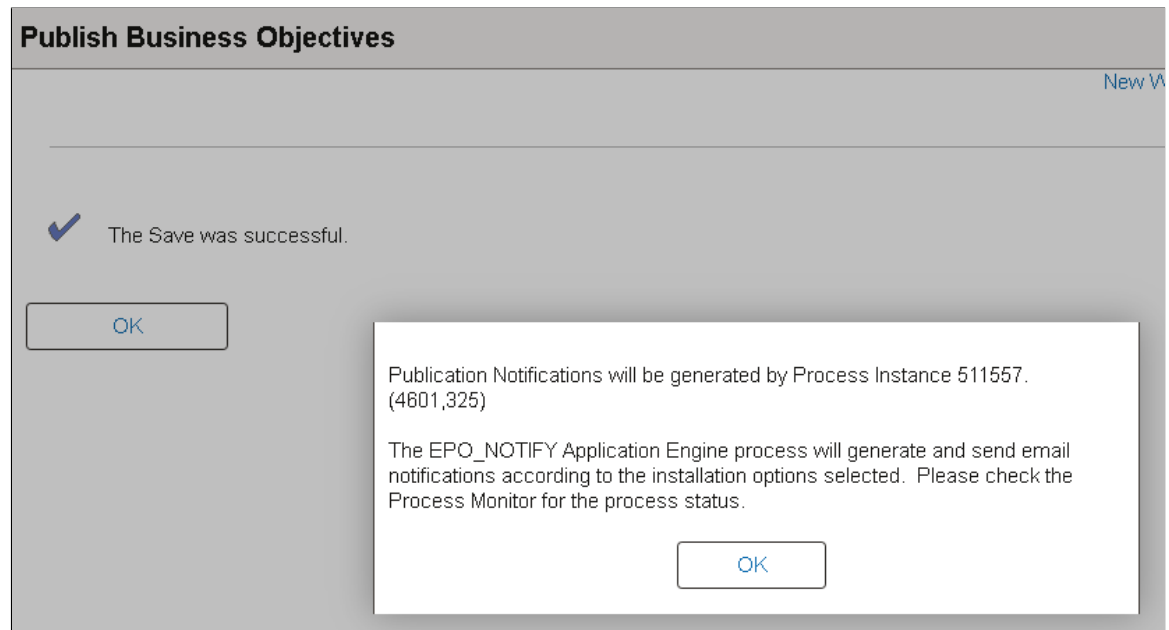
☒ Notify Administrator when a document is published

☒ Allow Managers or Alternate Editors to cascade items

☒ Notify Administrator when items are cascaded

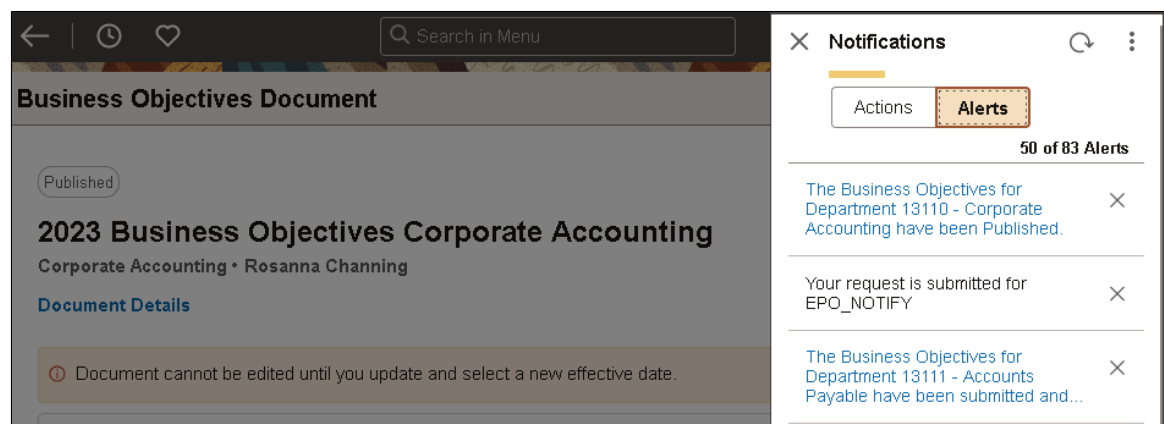
5. Each time you publish an objective page and you have publication notifications selected on the installation page, a notification process will be submitted to the process scheduler and you will get the following message identifying the process instance when you confirm your publication.
 - (For Administrators)

This example illustrates the publication confirmation as popup message.



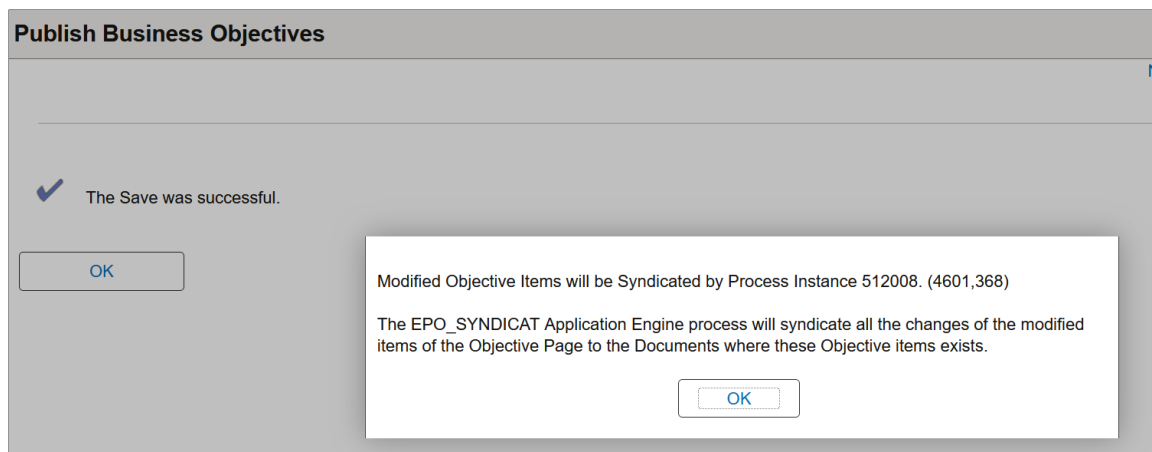
- (For Fluid Manager Self-Service)

This example illustrates the publication confirmation as informational alert displayed in the Notifications panel.



6. After a business objective page has been published, and you are republishing it after making updates, a process for syndication will be submitted to the process scheduler and you will get the following message identifying the process instance when you confirm your publication.

This example illustrates the process for syndication confirmation as popup message.



7. Once a business objective page has been published, it cannot be deleted.

Setting Up ePerformance Documents

Review this information when setting up performance documents to work with business objectives and performing processes related to business objectives.

1. Define Document Types

The **Objective Plan** field must be populated on the [Document Types Page](#) to work with business objectives. This field ties the business objective plan to the ePerformance document type.

This example illustrates the Document Types page.

The screenshot shows the 'Document Types' page with a sub-header 'Document Type' and the value 'PERFORM'. Below this is a 'Document Type Detail' section with a search icon and pagination '1 of 1'. The form contains the following fields and options:

- Effective Date:** 01/01/2000 (calendar icon)
- *Status:** Active (dropdown menu)
- *Description:** Performance Document (text field)
- Short Description:** Perform (text field)
- *Document Usage:** Performance (dropdown menu)
- Initiate Process:**
 - ☒ Employee
 - ☒ Manager
 - ☒ Employee can Select Manager
- Clone Existing Document:**
 - ☒ Employee
 - ☒ Manager
- Template Source:**
 - ☒ User Specified
 - ☐ Profile Management
- Profile Type:** (dropdown menu)
- Default Template:** (text field)
- Definition ID:** (text field with search icon)
- Objective Plan:** 2023 (dropdown menu, highlighted with a blue box)

2. Define Document Sections

Note that:

1. The **Special Processing** field must be set to *Business Objectives* on the section in order to tie an ePerformance document section to a Business Objective page. This will allow you to copy, align and cascade items between business objectives and performance documents.
2. The **Special Processing** field must be defined on the section, because once it's set on the section it can't be updated on the template.
3. If the section special processing is *Business Objectives* on the Section Definition Page, then the **Align Items** and **Links To** fields are available and are used to connect an item in a performance document section to an appropriate business objective document item for the business objective plan.

This example illustrates the Section Definition page (1 of 2).

Section Definition

Section Type GOALS

Section Definition Detail | < < 1 of 1 > > | View All

Effective Date 01/01/1900 *Status Active ☐ Fluid Section

*Description Goals & Objectives

Section

☒ Rate ☐ Preliminary Rating ☐ Weight

Calculation Method Average

Rating Model

Rating Display

Minimum Weight 0 Weight 0

*Special Processing Business Objectives

This example illustrates the Section Definition page (2 of 2).

Items

☒ Enable Items ☒ Free-Form Allowed ☒ Rate ☐ Use Section Rating Model ☐ Weight ☐ Mandatory ☒ Description ☒ Due Date ☐ Ownership ☒ Percentage Completed ☐ Level of Difficulty ☒ Align Items ☐ Status ☒ Empl Measures ☒ Start Date

Content Type Business Objectives [Define Content Group](#)

Prompt Table EP_J_CAT_ITEM_I

☐ Target Rating ☐ Minimum Weight ☐ Critical ☐ Measures ☐ Reminder Date ☒ Stretch Goal

Links to Any Section

User Defined Value

☒ Private - hide from employees ☒ End Date

3. Define Document Templates

Note that:

- To have business objectives available for copy from within a performance document section:
 - Bring in section(s) with special processing = *Business Objectives* on the Template Definition - Structure Page. This will bring in all section values to the template definition and enable the Role Rules of *copy objective items* for Define Criteria, Track Progress and Final Evaluation steps. If these Role Rules are not enabled, then copy will not be allowed from within performance documents of the associated template.

- The content type on the business objective section(s) (business objective template definition) must be the same as the content type on the performance document section (special processing = *Business Objectives*) that you want to copy business objectives to.
 - Select the **Copy Objective Items** check box in the Define Criteria, Track Progress and Final Evaluation Step Role Rules grids to enable those roles to copy.
2. When section special processing = *Business Objectives* and the **Links To** field is set to *Any Section*, the system will display the items from all sections in the associated business objective document that have the same content type as the ePerformance document section from which you are aligning items.
 3. Selecting the **Private - hide from employees** option hides items when the employee or manager tries to add items to the employee's performance document from the manager's document. This will prevent private items from being copied to the employee's document from the manager's document.
 4. The **Measures** field comes from Content Catalog and therefore can't be updated on the template or document. On the other hand, the **Employee Measures** long field does not come Content Catalog and therefore can be updated at the template and document level (it can be used as long flex field with text catalog).
 5. The **Status** and **User Defined Value** fields go together. If the **Status** field is selected, then the **User Defined Values** field will display a list of values that have been defined on the "Custom Prompt Page" (PeopleSoft Human Resources Manage Profiles) in the Content Catalog with the prompt list name = *OBJECTIVE STATUS*.

This example illustrates the Custom Prompt page.

Custom Prompt

New Window | Help | Personalize Page

Prompt List Name OBJECTIVE STATUS

Custom Prompt ⓘ

*Effective Date 01/01/1980 *Status Active

*Description Objective Statuses

*Short Description Obj ☐ System Data

*Maximum Length 1

Prompt Type

☒ Use Custom List Values
☐ Use Prompt Record

Prompt Values

*List Value	*Description		
C	Completed	+	-
I	In Progress	+	-
N	Not Applicable	+	-
S	Not Started	+	-

6. Select the **Copy Manager's Items** check box in the Role Rules grids to enable the copying of document items from managers' documents into employees' performance documents.

7. Select the **Copy from Another Document** check box in the Role Rules grids to enable the copying of document items from documents of other team members (or other documents of the employee) into employees' performance documents.

This example illustrates the Template Definition - Structure page (1 of 3).

Template Definition

[New Window](#) | [Help](#) | [Feedback](#)

General
Process
Tabs
Structure
Content

Document Type
PERFORM

Document Type description
Performance Document

Template ID
K0PERF2

Effective Date
01/01/1980

Sections ?
Q

*Section Type Q

Goals & Objectives

*Display Order

☒ Include in Define Criteria

☐ Fluid Section

Section ?

☒ Rate

☐ Preliminary Rating

☐ Weight

Calculation Method

Rating Model Q

Rating Display

Order By

Minimum Weight

Weight

*Special Processing

This example illustrates the Template Definition - Structure page (2 of 3).

Items ?

☒ Enable Items

☒ Free-Form Allowed

☒ Rate

☒ Use Section Rating Model

☐ Weight

☐ Mandatory

☒ Description

☒ Due Date

☐ Ownership

☐ Percentage Completed

☐ Level of Difficulty

Content Type

Business Objectives

[Define Content Group](#)

Prompt Table

EP_J_CAT_ITEM_I

☐ Target Rating

☐ Minimum Weight

☐ Critical

☐ Measures

☐ Reminder Date

☒ Stretch Goal

☒ Align Items

Links to

Any Section

☒ Status

User Defined Value

OBJECTIVE STATUS

☐ Empl Measures

☒ Private - hide from employees

☐ Start Date

☐ End Date

This example illustrates the Template Definition - Structure page (3 of 3).

Define Criteria Step - Role Rules ⓘ

Role	Add Items	Update Items	Delete Items	Copy Objective Items	Copy Manager's Items	Copy from Another Document	Participant Feedback		
Employee ▼	☒	☒	☒	☒	☒	☒	☐	+	-
Manager ▼	☒	☒	☒	☒	☒	☒	☐	+	-

Final Evaluation Step - Role Rules ⓘ

Rate/Weight Section Item **Edit** Profile Management ▶▶

*Role	Add	Update	Delete	Copy Objective Items	Copy Manager's Items	Copy from Another Document		
Employee ▼	☒	☒	☒	☒	☒	☐	+	-
Manager ▼	☒	☒	☒	☒	☒	☐	+	-

4. Create Performance Documents

Administrators can create performance documents for employees by group ID or employee ID in a batch process on the [Create Documents Page](#).

This example illustrates the Create Documents page for administrators.

Create Documents

Run Control ID PS Report Manager Process Monitor Run

Run Request Parameters

Period Begin Date Period End Date

Document Type Template ID

Manager Selection Method

Create Documents Using

☒ Group ID ☐ Employee ID

Documents Using Group ID

Employee Groups to Process

1-1 of 1 View All

	*Group ID	As Of Date	Description	Language Code		
1		03/14/2024			+	-

Managers can create performance documents for their direct/indirect reports in Fluid Manager Self-Service, if enabled by document type.

This example illustrates the Create Documents button on the Team Documents page for managers.

Employees can create performance documents for themselves in Fluid Self-Service, if enabled by document type.

This example illustrates the Create Document button on the My Documents page for employees.

See Also [Team Documents - Team Documents Page](#) and [My Documents - My Documents Page](#).

5. Update Performance Documents

Note that:

1. If section special processing = *Business Objectives*, then the **Business Objectives** tab is available in the section which will allow you to view the closest business objective page when adding items.

This example illustrates the Select/Create Items - Business Objectives page.

The Select/Create Items - Business Objectives page will display business objectives from the listed published business objective document where the section and content type match between the ePerformance document and the business objective document.

2. On the Performance Document Item page where you can update the item, the **Alignment** section is displayed (when the section is set up to align items).

The **Aligned To** drop-down lists all business objectives from the section used for alignment on the template. The objectives will come from the business objective document displayed in the **Title** field.

Once an item is selected, the **Section** field value is updated to show the section of the selected business objective in the specified business objective document.

The **Chain** icon is also available to show how the selected business objective aligns with other higher-level business objectives. When you copy the items, the alignment from the business objective document will also be copied. The alignment cannot be updated unless the alignment was blank at the time of the copy.

This example illustrates the Performance Document Item page.

The screenshot displays the 'Performance Document Item' page for 'Employee Goals'. The main title is 'Provide Quality Educational Opportunities' by Rosanna Channing. The page is divided into several sections:

- Details:**
 - Title: Provide Quality Educational Opportunities
 - Description: Provide each employee with ample education and training opportunities so they can further their skills and abilities in the workplace.
- Dates:**
 - Due Date: MM/DD/YYYY (with a calendar icon)
- Attributes:**
 - Status: (dropdown menu)
 - Stretch Goal: ☐ No
 - Private: ☐ No
- Alignment (highlighted with a blue box):**
 - Title: 2023 Business Objectives Corporate Accounting
 - Section: Employee Commitment
 - Aligned To: Provide Quality Educational Opportunities (dropdown menu) with a chain icon.

3. In addition to editing items, the manager can use the **Copy To** action from the **More Actions** menu to copy items from the employee's performance document to other documents that the manager owns. This functionality is only available to documents in the Define Criteria, Checkpoint or Finalize Criteria step, and not in the Evaluation step.

This example illustrates the Copy To action on the Performance Document page to be used by managers to copy business objectives to other documents.

The screenshot shows the 'Performance Document' page for Rosanna Channing, Senior Accounting Manager, for the period 1 Jan - 31 Dec 2023. The page is in 'In Progress' status. It displays 'Step 1 of 2: Define Criteria'. Under 'Employee Goals', there are two items: 'Provide Quality Educational Opportunities' and 'Demonstrate Customer Respect and Loyalty', both with 'No Due Date'. Under 'Competencies', there is one item: 'Analytical thinking'. A dropdown menu is open for the 'Demonstrate Customer Respect and Loyalty' goal, showing options: 'Copy To...', 'Notes', 'Delete', and 'Last Updated'. The 'Copy To...' option is highlighted with a blue box.

Select one or more documents to which the specified item is copied.

This example illustrates the Copy to Other Documents page.

The screenshot shows the 'Copy to Other Documents' dialog box. It has a 'Cancel' button on the top left and a 'Save' button on the top right. The main text reads: 'This function will copy item Demonstrate Customer Respect and Loyalty to the selected documents.' Below this, it says: 'This is the list of documents to which selected item(s) can be copied. This list includes only documents that have the same document type and section as the document you are currently on and where evaluation criteria is in progress.' There are links for 'Select All' and 'Deselect All'. A list of documents is shown, with one document selected: 'Netty Owyang, Manager-Accounting, 1 Jan - 31 Dec 2023'.

See Also [\(Fluid\) Working With ePerformance Documents](#).

6. Cascade Business Objectives

Cascade is a process (EP_CASCADE) that pushes items from a business objective document into one or more performance documents. The process is available to administrators as well as managers (if enabled on the ePerformance Installation - Objective Pages page).

At one time, items from a particular section of a business objective page can be cascaded. To cascade items from other sections or other business objective page, the administrator must run the process again with different values. This process is mass insertion of items into documents.

Business objectives can be cascaded to performance documents only if the content type of the selected sections (both business objective page and performance document) is the same. Since a document can have the same content type in more than 1 section, the administrator must specify the name of the section where items need to be cascaded/copied.

On the **Select Objectives Page**, the administrator will define the information pertaining to the business objective page. Once an objective plan and a department are selected, all sections of the business objective page matching the criteria will be displayed. Selection of section will further display its item in the grid. One or more items can be selected for cascade.

This example illustrates the Cascade Objective Items - Select Objectives page for administrators.

Cascade Objective Items

Select Objectives | Document Parameters

Run Control ID: PS | Report Manager | Process Monitor | Run

*Objective Plan: 2023 | Set ID: SHARE | *Section Type: Profitability

2023 Business Objectives | Department ID: 13100

Cascade Run Type: ☐ Preview Cascade Items ☒ Confirm Cascade Items

Page Title: 2016 Business Objectives Corporate Finance
Page Owner: KU0007

Section : Profitability

Objective Title
☐ Maintain Cost Effective Service
☒ Effectively Manage Department Expense

Since pushing of these items into the documents is an irreversible process, 2 run types are available: Preview Cascade Items and Confirm Cascade Items.

The Preview option gives an ability to see how the business objectives would look like in performance documents after cascade. In this mode, there will *not be any database updates*. A PDF report will be created, listing the business objectives to be cascaded and the documents where they WILL be cascaded. If for some reason a business objective cannot be cascaded to a document, the reason will be specified in the report as well. In this way, the administrator can visualize the result and can make changes to the selection criteria if needed. This option can be run any number of times. The data will be stored in temporary tables.

This example illustrates the Cascade Item Report listing documents to which business objectives to be cascaded.



Cascade Item Report

Page 1 of 1
 3/14/2024

Page Title : 2016 Business Objectives Corporate Finance
 Plan :
 Section : Profitability
 Period : 2022-07-01 - 2023-12-31

SetId : SHARE
 Department : 13100
 User : PS
 Run Id : PS

Item : Effectively Manage Department Expense

Item Cascade Successful:

Doc Id	Empl Id	Name	Role
1363	KU0046	Rosanna Channing	
1364	KU0055	Netty Owyang	

In case of the Confirm option, items are added to the ePerformance item tables. The PDF report is again generated, and notifications are sent when *Confirm Cascade Items* is selected and completed. Second run of the Confirm option process for the same selection will not result any data if *overwrite* is not allowed, and will have the same result as previous if *overwrite* is allowed.

This example illustrates the Cascade Objective Items - Document Parameters page for administrators.

Cascade Objective Items

Select Objectives
Document Parameters

Run Control ID PS
Report Manager Process Monitor
Run

ePerformance Document Parameters

*Document Type

*Period Begin Date

*Manager ID

*Cascade Levels

Section Type

Period End Date

☐ Overwrite existing Item?

Same content type as objective section

Overwrite item in performance document

Copy items to documents of direct reports (or direct and indirect reports)

Once business objectives are selected, use the Document Parameters Page to enter selection criteria for performance documents. The **Section Type** drop-down field will list all sections that have the same content type as that of the business objective section. Documents owned by the specified manager created between entered period begin date and end date will be selected. If the period end date is blank, then documents created up until today will be included.

Selecting the **Overwrite existing item** check box will overwrite the common items in the documents (otherwise those items will be skipped on the document). This is another way of bringing in the changes made to business objectives after their insertion into performance document.

Review this example:

A business objective named *Take professional training every Quarter* has Update Skills aligned to it on the business objective document of the IT Dept. This item got copied over to performance document of employee K1 on 1/15/2023. On 6/23/2023, the alignment on the business objective got changed to another

item *Enroll in OU training*. This change has not trickled into the performance document. When items from this business objective document is cascaded next time and the Overwrite option is enabled, then this change will also be copied. If the Overwrite option is not selected, then the process will skip this item as it is already present in the document.

In this example, it is recommended to select the Overwrite option for the cascade process.

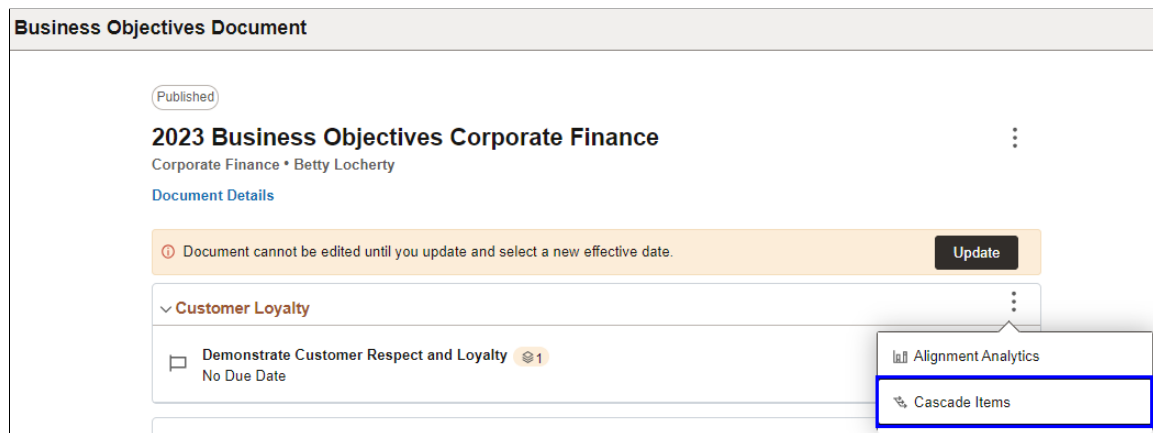
Such changes can also be brought over in documents by the Syndicate process. It is explained later in this document.

The **Cascade Levels** field determines if the selected business objectives need to be cascaded to the manager's direct reports only or indirect reports also. Select *One* for direct reports only. Select *All* to include both direct and indirect reports all the way down in the chain.

Cascade items are treated like mandatory items where item details cannot be edited on the performance document. Cascade item on a document, if copied to other documents will still be treated as a cascade item on other documents.

Managers can also cascade items to performance documents if the **Allow Managers or Alternate Editors to cascade items** check box is selected on the ePerformance Installation - Objective Pages Page. Instead of a run control page, they run the cascade process directly from their business objective documents in Fluid. From the section where they want to run the process, select *Cascade Items*.

This example illustrates the Cascade Items action on the Business Objectives Document page to be used by managers to cascade business objectives to performance documents.



On the Cascade Items Page, select the items to be cascaded, and specify the criteria of the team documents to where items will be cascaded.

Select to run the process using the Preview or Confirm option. If this is the first time to run the process, Preview is the only option. A status message appears next to the business objective document's section title, showing when the process is submitted or completed. Upon completion, use the **Cascade Item Report** link to review the results in the PDF report.

Select the cascade level and specify if the process should overwrite items that already exist in target performance documents.

This example illustrates the Cascade Items page.

CancelCascade ItemsSubmit

2023 Business Objectives Corporate Finance

Corporate Finance • Betty Locherty

Select objective items to cascade to your team's performance documents. Enter the performance document type and section you want to update. Select the run settings then select Submit to initiate the cascade process.

Objective

Objective Plan2023 Business Objectives

DepartmentCorporate Finance

Section TypeCustomer Loyalty

Items

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

☒ Demonstrate Customer Respect and Loyalty

Document

*Document TypePerformance Document

*Section TypeGoals & Objectives

*Period Begin Date07/01/2022

Period End Date12/31/2023

Settings

*Cascade Run TypeConfirm Cascade Items

[Cascade Item Report](#)

*Cascade LevelsOne

Overwrite existing Item?☒

Cascade Notifications: If the notification options are enabled, then notifications will be sent out after the completion of the Confirm option process.

This example illustrates the ePerformance Installation - Objective Pages page.

ePerformance Installation

ePerformance
Objective Pages

Last Page ID 58

Last Objective Item ID 332

Configure e-Mail Notifications

- ☒ Notify owner when page is created
- ☒ Notify new owner when page has been transferred
- ☒ Notify old owner when page has been transferred
- ☒ Notify administrator when page is submitted for publication
- ☒ Notify page owners when page has been published
 - ☒ One notification per publication process
- ☒ Notify direct/indirect reports when page has been published
 - ☒ One notification per publication process
- ☒ Notify only on first publication
- ☒ Notify Employee when Objective Item is cascaded to their document
- ☒ Notify Manager when Objective Item is cascaded to their document

Fluid Settings

- ☒ Allow Managers or Alternate Editors to create documents
- ☒ Allow Alternate Editor to select document owner
- ☒ Allow Managers or Alternate Editors to publish documents
 - ☒ Notify Administrator when a document is published
- ☒ Allow Managers or Alternate Editors to cascade items
 - ☒ Notify Administrator when items are cascaded

Administrators can review a list of item cascading processes that are run by managers on the [Review Manager Cascaded Items Page](#).

This example illustrates the Review Manager Cascaded Items page.

Review Manager Cascaded Items						
Cascaded Items						
4 rows						
Business Objectives TL	Section Type TL	Document Type TL	Run Type TL	Submitted Date/Time TL	Submitted By TL	
2016 Business Objectives Corporate Finance	Profitability	Performance Document	Preview	01/18/2024 9:08:34AM	Betty Locherty	>
2023 Business Objectives Corporate Finance	Employee Commitment	Annual Review	Preview	01/18/2024 9:02:13AM	Betty Locherty	>
2016 Business Objectives Corporate Finance	Customer Loyalty	Performance Document	Confirm	01/17/2024 6:10:40PM	Betty Locherty	>
2016 Business Objectives Corporate Finance	Employee Commitment	Performance Document	Preview	01/17/2024 12:25:29PM	Betty Locherty	>

7. Syndication Process

This is the process which brings down the changes made to a business objective item into the performance document if that item exists in the document. This is not an online process but run automatically when the business objective document with the modified item is republished by the administrator.

When any item is modified on a business objective document that was once published, a flag is set for syndication. When the administrator publishes this document again, the syndication process (part of the publish process) checks for the flag. If the flag is found to be set then the syndication process will run by itself. The process will not hold publication of the document.

For each item that needs to be syndicated, the process selects the document where the item exists and updates with the current values. The syndication flag is then reset on the business objective item. If no documents are found to have the marked item, then process will just reset the flag.

If for any reason the process fails, the administrator can use the [Restart Batch Processes Page](#) to restart the process.

8. Restart Batch Process

There are 2 batch jobs automatically submitted to the Process Scheduler when business objective documents are published. They are the Batch Notifications job with publication, and the Syndication job when republishing a business objective document. Use the [Restart Batch Processes Page](#) to restart those batch processes if they fail.

This example illustrates the Restart Batch Processes page.

Rerun Objective Batch Process
[New Window](#)

[Restart Batch Processes](#)

Run Control ID

PS

Report Manager

Process Monitor

The following processes are available to be Re-run. Select the process(es) you would like to Re-run and then select Submit.

Processes to be Re-run

	Process Name	Run Date Time	Objective Plan	User ID	Set ID	Hierarchy Method
☐	EPO_NOTIFY	03/13/2024 7:21:17PM	2016	PS	SHARE	D
☐	EPO_NOTIFY	03/11/2024 4:22:42PM	2023	PS	SHARE	D

9. Create Business Objectives Summary Data

Note that:

1. The EPO_OBJ_EXT (Create Objectives Summary Data) process gathers the data that is used to display the alignment chart report. This process should be run whenever business objective items are associated with ePerformance documents and the Item alignment changes.

This example illustrates the Create Objectives Summary Data page.

Create Objectives Summary Data

Run Control ID PS
Report Manager Process Monitor
Run

Objective Plan 2023 2023 Business Objectives
Set ID SHARE Table Set shared across Corp

See Also [Create Objectives Summary Data Page](#).

2. Access the chart report from the icon on the business objective page at the Section level.

The chart displays the number of items that are aligned to a business objective for a section.

This example illustrates the Alignment Analytics action on the Business Objectives Document page to be used by managers to view business objective alignments for employees.

Business Objectives Document

Published

2023 Objectives for the Finance Organization

Corporate Finance • Betty Locherty
Document Details

Document cannot be edited until you update and select a new effective date.
Update

> Customer Loyalty

▼ Profitability

☐ Maintain Cost Effective Services

☐ Provide Accurate and Timely Financial Reports

Alignment Analytics
Cascade Items

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

<i>Field or Control</i>	<i>Description</i>
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: <i>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.</i> 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.

Field or Control	Description
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 sub-items (behaviors), the item rating was calculated.	Competency text for the item and rating.
Item	Sub-competency	At least one sub-item for the item is rated.	Sub-competency text for the item, sub-item, and rating.
Section	Competency	At least one item in the section is rated. If the item has sub-items, 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.

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

[Defining Content for the Development Tips and Results Writer Tools](#)

[Linking Development Tips to Competencies and Sub-Competencies](#)

[\(Classic\) 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

<i>Page Name</i>	<i>Definition Name</i>	<i>Usage</i>
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

[\(Classic\) 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

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.

Field or Control	Description
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 <i>Customer Defined</i> .
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

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

<i>Field or Control</i>	<i>Description</i>
Content Supplier	Select the source of the content: <i>Customer Defined</i> 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.
Define Results Writer - Competency Page	EP_COMP_WRT_TBL	Define Results Writer statements for each level of proficiency associated with a competency.
Define 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

[\(Classic\) Working With Writing Tools](#)

“Understanding the Content Catalog” (PeopleSoft 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

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

The screenshot shows the 'Define Development Tips' page. At the top, the title 'Define Development Tips' is displayed in blue. Below it, the 'Development Tip ID' is 'CHANGE03'. The form contains three main fields:

- *Title:** A text input field containing 'Adapts to change - Strength'.
- *Content Supplier:** A dropdown menu with 'Customer Defined' selected.
- Description:** A large text area containing the text 'Be a champion for change. Initiate the efforts to deliver the message or vision for change to everyone.' There is a small icon in the top right corner of the text area.

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.

Field or Control	Description
Content Supplier	Select the content supplier for the development tip. Select a third-party supplier from the available options, or select <i>Customer Defined</i> 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

This example illustrates the fields and controls on the Link Development Tips - Competency page.

Field or Control	Description
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

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.

Define Results Writer - Competency Page

Use the Define 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 > Define Results Writer > Competency

This example illustrates the fields and controls on the Define 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.

Field or Control	Description
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**.

Define Results Writer - Sub-Competencies Page

Use the Define 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 > Define Results Writer > Sub-Competencies

This example illustrates the fields and controls on the Define Results Writer - Sub-Competencies page.

The screenshot displays the 'Define Results Writer - Sub-Competencies' page. It features a breadcrumb trail: **Competency** (ADAPT) > **Sub-Competencies** (CHANGE). Below this, there is a section for **Proficiency Description** (CHANGE) with a 'Find | View All' link and pagination (First, 1 of 2, Last). The main section is **Results Writer Detail**, which contains a table with the following structure:

*Seq Nbr	Results Writer	Review Rating
1	%1 is always able to smoothly integrate changes into %3 existing plans.	Above Average
1	%1 usually integrates changes smoothly into %3 existing plans.	Average

Each row in the table includes a 'Find | View All' link, pagination (First, 1 of 2, Last), and a button to add a new row (+).

The Define Results Writer - Sub-Competencies page and Define 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

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.

Field or Control	Description
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” (Integration Interfaces)	EO_FILE_INBOUND	Select the file that you are importing into the Advisor tools.
“Inbound File Page” (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 <i>PeopleTools: Process Scheduler</i>, “Viewing the Status of Processes”

Related Links

“Understanding the Flat File Utility” (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.

<i>File Identifier</i>	<i>Description</i>
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” (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” (Application Fundamentals).

Video: [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 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.

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 Publish 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:

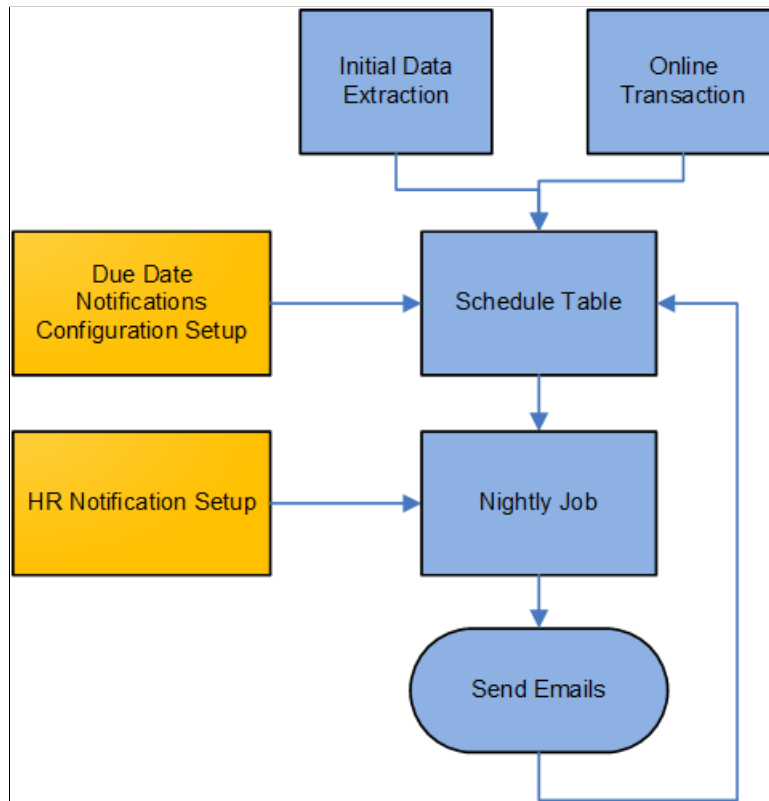
- Define Criteria
- Checkpoint
- Finalize Criteria
- Nominate Participants
- Evaluation

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 Publish 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.

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.

Video: [Image Highlights, PeopleSoft HCM Update Image 27: ePerformance Due Date Notifications](#)

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.

<i>Due Date Type or Evaluation Step</i>	<i>Step Due Date</i>	<i>Who To Notify</i>	<i>WHEN DUE DATE NOTIFICATIONS ARE SENT</i>
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)

<i>Due Date Type or Evaluation Step</i>	<i>Step Due Date</i>	<i>Who To Notify</i>	<i>WHEN DUE DATE NOTIFICATIONS ARE SENT</i>
Nominate participants	May 1	Manager, employee, or both	March 2 April 1 April 26
Complete mid-period checkpoint	June 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

Related Links

“Understanding Notification Publisher” (Enterprise Components)

Accessing Due Date Notification Setup Using Fluid Navigation Collection

This topic discusses a list of pages that individuals with the ePerformance Setup User role can access from the Fluid navigation collection to set up the Due Date Notifications feature.

For general information about fluid pages in PeopleSoft HCM, see “Understanding PeopleSoft Fluid User Interface Homepages” (Application Fundamentals).

Video: [Image Highlights, PeopleSoft HCM Update Image 17: Workforce Administrator and Talent Administrator Homepages](#)

Video: [PeopleSoft Fluid User Interface Experience in HCM](#)

Pages Used to Access Due Date Notification Setup Using Fluid Navigation Collection

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 Installation - ePerformance Page	EP_INSTALLATION	Enable the Due Date Notifications feature and specify scheduling options.
Maintain Text Catalog “Maintain Text Catalog Page” (Application Fundamentals)	HR_SSTEXT_TEXT	Review text catalogs for use in due date notifications and modify them if needed.
Define Recipient Type “Recipient Type Information Page” (Enterprise Components)	HCSC_RCPNT_GEN_FL	Review the recipient type to be used when creating notification instances.
Configure Email Template “Configure Email Template Page” (Enterprise Components)	HCSC_NOTIF_TMPL	Verify the bind parameters population method for email templates.
Publish Notification “Publish Notification Page” (Enterprise Components)	HCSC_ADH_NOTIF_FL	Verify notification instances.
Schedule Notification Process “Setting Up and Publishing Notifications” (Enterprise Components)	HCSC_NOTIF_RC	Schedule and run the process to generate and send due date notifications.

Performance Notifications Tile

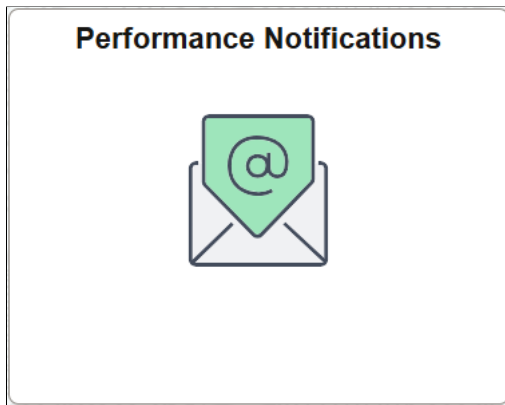
Use the Performance Notifications tile (HC_PERF_NOTIF_TILE_FL) to access pages to set up the Due Date Notifications feature that generates and sends due date reminders for evaluation documents.

Navigation:

Select *Talent Administrator* from the list of home pages. The **Performance Notifications** tile is available on the Talent Administrator landing page.

As an ePerformance setup user, you can add the tile, through personalization, to another system-delivered home page or a home page that you create.

This example illustrates the Performance Notifications tile.



Select 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.

This example illustrates the fields and controls on the Performance Notifications application start page.

 The screenshot shows the "Performance Notifications" application start page. On the left is a navigation pane with a header "Performance Notifications" and a list of links: "ePerformance Installation", "Maintain Text Catalog", "Define Recipient Type", "Configure Email Template", "Publish Notification", and "Schedule Notification Process". The main content area has a header with "ePerformance" and "Objective Pages" tabs, and links for "New Window", "Help", and "Personalize Page". Below the header, there is a "Last Document ID" field with the value "1369". To the right is a "Debug Options" section with checkboxes for "Debug Rating Calculations", "Allow Language Override", "PS Audit Enabled", "Enable AutoSave", "Enable Rich Text in Modal onl", and "Don't reposition document or". Below this is a "Configure e-Mail Notifications" section with two sub-sections: "Document Creation" and "Define Criteria & Track Progress". The "Document Creation" section has two checked checkboxes: "Document was created by HR (Recipient is Manager or Employee)" and "Document was created by Manager or Employee (Recipient is Manager or Employee)". The "Define Criteria & Track Progress" section has five checked checkboxes: "Employee add/updates an item (Recipient is Manager)", "Manager add/updates an item (Recipient is Employee)", "Define Criteria was approved (Recipient is Manager or Employee)", "Define Criteria was reopened (Recipient is Manager and/or Employee)", and "Checkpoint comments were shared (Recipient is Manager or Employee)".

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

- Define Recipient Type
- Configure Email Template
- Publish Notification
- Schedule Notification Process

Refer to the [Setting Up Due Date Notifications](#) 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 Installation - ePerformance Page](#). Each time the Notification Publisher 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 notification instances 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 technical brief (ID: 2420910.1) on My Oracle Support 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 Notification Publisher framework to support the Due Date Notifications feature.

The setup of the framework consists of a number of steps:

- a. Review the recipient type for this feature using the Recipient Setup component (HCSC_RCPNT_AG_FL).

The system delivers the `EP_DUEDT` recipient type, which is used in the recipient lookup when creating notification instances or composing due date notifications.

See Also “Recipient Type Information Page” (Enterprise Components)

- b. Review email templates on the “Generic Template Definition Page” (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*.

- c. Verify that email templates were loaded successfully to the system on the “Configure Email Template Page” (Enterprise Components).

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:

This example illustrates the an email template example used for due data notifications.

Configure Email Template

Email Template ID

EP_WARNING_EMAIL

Subject

%1

Message Text

%2

[View Template Variables](#)

▼ **Select Bind Parameter Population Method**

Root Package ID

EP_NOTIFICATIONS

Q

Qualified Package/Class Path

:

Q

Application Class ID

BindVariables

Q

Method

getBindParameters

▼

▼ **Template Security**

Security Type

Public Access

▼

- d. Verify that notification instances were loaded successfully to the system on the “Publish Notification Page” (Enterprise Components).

Do not modify these notification IDs.

Here is an example of a notification drafted for a due date email reminder:

This example illustrates a notification draft of a due date email reminder.

Publish Notification

Return to Search

Previous In List

Next In List

Notification Instance 24

Last Updated 01/01/1900

Send

Message Status Published

Select the recipients using the lookup. Recipients should be separated by a semicolon.
Note: Expiration Date is not applicable for email.

DescriptionWarning, Evaluation, Manager

CategoryHR Notification

Delivery MethodEmail

Posting Date01/01/1900

Email Template IDEP_WARNING_EMAILePerformance Warning Reminder

Priority2-Medium

Sender SystemEmail ID

To[ePerformance Due Date Reminder=Warning Reminder(2);Evaluation Due(5);Manager(M)];

CC

BCC

View Recipient List

- e. 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 notification instances in the system for processing.

Related Links

“Setting Up and Publishing Notifications” (Enterprise Components)

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Chapter 7

Generating Documents

Understanding Document Generation

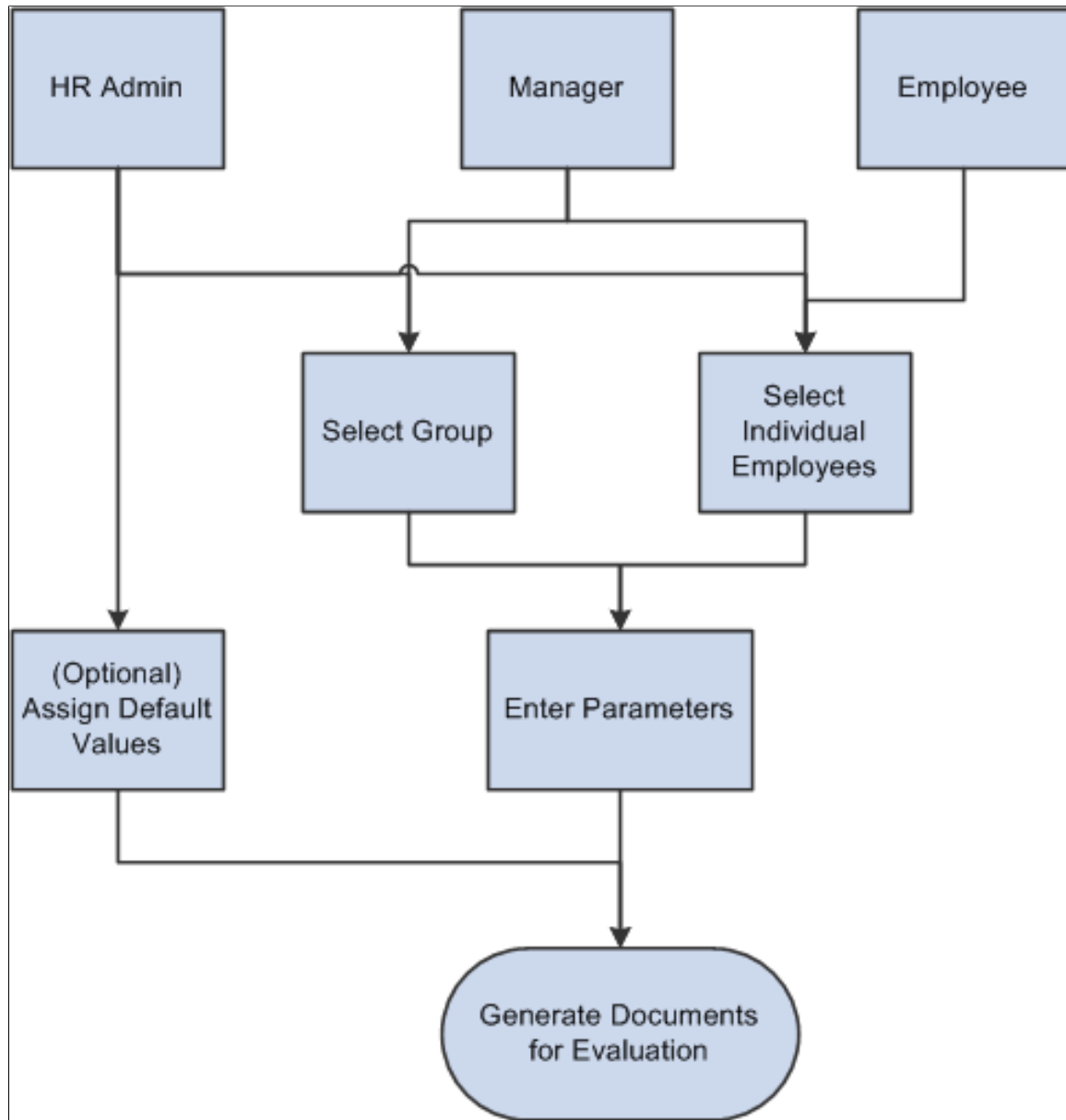
This section discusses:

- 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.

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](#).

Fluid ePerformance

Fluid ePerformance redesigns the components and pages for accessing and updating evaluation documents to better support the performance review process for managers, employees, and review participants. For more information, refer to the [Understanding Fluid ePerformance](#) topic.

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

ePerformance Field Label	Job Profile Manager Field Name
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 Company Directory, Employee Snapshot, PeopleSoft Search, and other HCM transactions that are accessible from files on Manager and Employee Self Service home pages.

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	- Transactions accessible through the Team Performance Tile - Open Performance Documents - Open Development Documents	- Employee Snapshot - My Team - Company Directory - PeopleSoft Search results - Manager Self-Service transactions where related actions are supported

Available to Role	Supported Related Action	Available In
Employee	Transactions accessible through the Performance Tile	- Company Directory (when viewing self record) - Personal Details - Employee Self-Service transactions where related actions are supported

These screenshots show the list of ePerformance relation actions that are initiated from Employee Snapshot (for managers) and Personal Details (for employees):

This example shows the performance management related actions for a manager.

This example shows the performance management related actions for an employee.

(Managers only) 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 access. 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.

Delegated Documents

Delegation is not supported in related actions. In other words, managers cannot open and edit documents that are delegated to them using 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” (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” (Application Fundamentals).

See “Understanding Job Data” (PeopleSoft Human Resources Administer Workforce).

See [Defining System Settings](#).

Assigning Document Defaults

This topic discusses how to assign document defaults.

Page Used to Assign Document Defaults

<i>Page Name</i>	<i>Definition Name</i>	<i>Usage</i>
Assign Document Defaults Page	EP_DEFAULT	Enter the default document type and evaluation period values for ePerformance-related transactions.

Assign Document Defaults Page

Use the Assign Document Defaults page (EP_DEFAULT) to enter the default document type and evaluation period values for ePerformance-related transactions.

Navigation:

Set Up HCM > Product Related > ePerformance > Document Structure > Assign Document Defaults > Assign Document Defaults

This example illustrates the fields and controls on the Assign Document Defaults page.

Assign Document Defaults

Assign Document Defaults
|
<
<
1 of 3
>
>

+
-

*Transaction Name
My Team

Document Type
Annual Review

Period Begin Date
Period End Date

+
-

*Transaction Name
Performance Status Chart

Document Type
Annual Review

Period Begin Date
01/01/2022
Period End Date
12/31/2022

+
-

*Transaction Name
Team Rating Insights

Document Type
Annual Review

Period Begin Date
01/01/2023
Period End Date
12/31/2024

Use this page to enter default values for use in a number of ePerformance-related transactions. When a supported transaction is initiated, the system prepopulates the default values that are specified for it.

Field or Control	Description
Transaction Name	Select the type of transaction for which the default values are specified. Values are: • <i>Create Documents</i>: Default values are used to create ePerformance documents in the PeopleSoft Classic User Interface. • <i>My Team</i>: Default values are used when retrieving performance data for the “My Team – Performance Page” (PeopleSoft eProfile Manager Desktop). • <i>Performance Status Chart</i>: Default values are used for launching the “My Team’s Performance Status Pagelet” (PeopleSoft eProfile Manager Desktop) for the first time. • <i>Profile Compare</i>: Default values are used to render performance review ratings for employees as additional information in profile compare results. • <i>Team Rating Insights</i>: Default values are used for launching the Team Rating Insights tile and dashboard visualizations for the first time.
Document Type	Specify the document type for use in the selected transaction. For the <i>Team Rating Insights</i> transaction, select a document type with the <i>Performance</i> document usage.
Period Begin Date and Period End Date	Specify the evaluation period for use in the selected transaction. Note: (For the <i>Team Rating Insights</i> transaction only) You can: - Specify a period begin date <i>and</i> period end date for the <i>Team Rating Insights</i> dashboard to show documents with a period begin date that falls within the specified range. Or, - Specify a period begin date for the dashboard to show documents with the exact same period begin date. Or, - Specify a period end date for the dashboard to show documents with the exact same period end date.

(Classic) Generating Documents as Administrators

This topic provides an overview on administrator document generation and discusses how to generate documents as administrators in Classic Plus mode.

Pages Used to Generate Documents as Administrators

<i>Page Name</i>	<i>Definition Name</i>	<i>Usage</i>
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 [Performance Management Tile](#). On the left navigation, select **Performance Documents > Create Performance Documents** or **Development Documents > Create Development Documents**.
- (Classic) **Workforce Development > Performance Management > Performance Documents > Create Performance Documents > Create Documents**
- (Classic) **Workforce Development > Performance Management > Development Documents > Create Development Documents > Create Documents**

Note: This task is available to administrators and managers both on Fluid homepages and from the Navigator menu. When accessed from the Navigator, do not add this task page to a Fluid homepage or the NavBar from the Actions menu.

Refer to the [Performance Management Tile](#) and [Team Performance Tile](#) topics for more information about performing this task in fluid.

This example illustrates the fields and controls on the Create Documents page.

Create Documents

Run Control ID 1
Report Manager
Process Monitor
Run

Run Request Parameters

Period Begin Date 01/01/2021
Period End Date 12/31/2021

Document Type Performance Review
Template ID K0BDGT01

Manager Selection Method By Department Manager ID

Create Documents Using

☒ Group ID
☐ Employee ID

Documents Using Group ID

Employee Groups to Process

1-1 of 1
View All

	*Group ID	As Of Date	Description	Language Code		
1	G1	02/22/2021	G1		+	-

Run Request Parameters

Field or Control	Description
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 Assigning Document Defaults.
Document Type	Enter a document type such as <i>Performance Document</i>, <i>Performance Plan</i>, or <i>Annual Review</i>. 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 Assigning Document Defaults.
Template ID	Select the template ID to generate the documents. This field is available if the template source on the Document Types page is <i>User Defined</i> for this document type.

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

Create Document Using

Field or Control	Description
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.

<i>Field or Control</i>	<i>Description</i>
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

<i>Field or Control</i>	<i>Description</i>
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

<i>Field or Control</i>	<i>Description</i>
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 Human Resources Manage Positions)

“Understanding Group Build” (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

This example illustrates the fields and controls on the View Document Creation Results page.

View Document Creation Results

Run Control ID 1

Run Request Parameters

Period Begin Date 01/01/2021

Period End Date 12/31/2021

Document Type KOMERIT1

Performance Review

Manager Selection Method By Department Manager ID

Create Documents Using

☒ Group ID
 ☐ Employee ID

Documents Using Group ID

Results

Group ID G1 G1

Employee Groups Processed

Empl ID	Empl Record	Name	Template ID	Group Manager ID / Mentor ID	Supervisor Name	Success?	Status
PU221	0	Nicole-Marie Appleton	Performance Review - Average			No	The document could not be created as input parameters are missing or invalid. Please contact your system administrator.
Z1000	0	Charles Albion	Performance Review - Average	Z9002	Randall Capman	Yes	Document created successfully

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

(Classic) Generating Documents as Managers

This topic provides an overview of the document generation process for direct reports and discusses how to generate documents as managers in Classic Plus mode.

Note: A fluid version of ePerformance is now available to support employee performance reviews. For more information, see [Understanding Fluid ePerformance](#).

Pages Used to Generate Documents as Managers

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.

Note: (Fluid navigation collection) Refer to the [Create Documents Page \(Team Performance\)](#) topic to create new documents as managers using the navigation collection from the fluid **Team Performance** tile.

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 Performance Doc by Grp > Create Performance Documents**
- **Manager Self-Service > Performance Management > Development Documents > Create Development Doc by Grp > Create Development Documents**

This example illustrates the fields and controls on the Create <Performance or Development> Documents - Select Group page.

Create Performance Documents

Employee Selection Criteria
Here is a list of groups that you manage. Select the group you want to use for creating new performance documents.
Select *Continue* when finished

As Of Date 02/22/2021  [Refresh Groups](#)

Select Group

	Group ID	Description
Select	HXCMPGROUPP1	GROUP P1
Select	HXCMPJC10	HXCMPJC10
Select	HXCMPJC11	HXCMPJC11
Select	HXCMPJC12	HXCMPJC12
Select	HXCMPJC13	HXCMPJC13

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:

- Select a group on the Create <Performance or Development> Documents - Select Group page.
- **Manager Self-Service > Performance Management > Performance Documents > Create Performance Documents > Create Performance Documents**
- **Manager Self-Service > Performance Management > Development Documents > Create Development Documents > Create Development Documents**

This example illustrates the fields and controls on the Create <Performance or Development> Documents - Employee Selection Criteria page.

Create Performance Documents

Employee Selection Criteria
Select the employees you are creating new performance documents for.

As Of Date  [Refresh Employees](#)

[Find Employee](#)

Betty Locherty's employees

Select	Name	Empl ID	HR Status	Job Title	Department
☐	Amelia Lucas	HXGSS101	Active	QA Analyst	HRMS Division
☐	CDETRosanna Channing	DETC0046	Active	Senior Accounting Manager	Corporate Accounting
☐	 Cynthia Adams	KU0101	Active	Corporate Controller	Corporate Accounting
☐	Diane Palmer	KOMTX005	Active	Administrative Assistant	Corporate Finance
☐	Franklin Ron	HXGSS100	Active	QA Analyst	HRMS Division
☐	 Jill Chancellor	KUL702	Active	Payroll Manager	Payroll
☐	 Netty Owyang	KU0055	Active	Manager-Accounting	International Accounting
☐	Paul Jackson	HXADMIN1	Active	HR-System Test Job Code	HRMS Division
☐	Pierre Potvin	SI0008	Active	Senior Financial Analyst	Corporate Finance
☐	 Rosanna Channing	KU0046	Active	Senior Accounting Manager	Corporate Accounting
☐	 Steve Smith	SSMITH	Active	Manager	HRMS Division
☐	Susan Hoinck	KU0119	Active	Senior Financial Analyst	Corporate Finance
☐	 Tina Palisco	KU0071	Active	Manager-Accounting	Corporate Consolidations

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

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, listing the employees belonging to that group.

The system populates the list of employees for whom you can create documents 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 unavailable for entry.

Field or Control	Description
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” (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.

This example illustrates the fields and controls on the Create <Performance or Development> Documents - Document Creation Details page.

Create Performance Documents

Complete the information in the *Document Creation Details* section below, then select **Create Documents** to generate documents for the employee(s) you previously selected.

Document Creation Details

Period Begin Date

Period End Date

Document Type

Create Documents

Selected Employees

Employee ID	Last Name	First Name
HXGSS100	Ron	Franklin
KOMTX005	Palmer	Diane

[Return to Select Employees](#)

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.

Refer to the [Create Documents Page \(Team Performance\)](#) topic to create new documents as managers from the fluid Manager Self Service home 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.

This example illustrates the fields and controls on the Create <Performance or Development> Documents - Results page.

Create Performance Documents - Results
Below are the results for the employees you selected.

Selected Employees

Employee ID	Name	Template	Successful Creation?	Status
HXGSS100	Franklin Ron	Perf Eval for Compensation	Yes	Document created successfully
K0MTX005	Diane Palmer	Perf Eval for Compensation	Yes	Document created successfully

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

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

<i>Field or Control</i>	<i>Description</i>
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.

(Classic) Generating Documents as Employees

This topic discusses how to generate documents as employees in Classic Plus mode.

Note: A fluid version of ePerformance is now available to support employee performance reviews. For more information, see [Understanding Fluid ePerformance](#).

Page Used to Generate Documents as Employees

<i>Page Name</i>	<i>Definition Name</i>	<i>Usage</i>
Create <Performance or Development> Documents Page	EP_CREATEAPPR_EE	Enter parameters for generating documents as employees.

Create <Performance or Development> Documents Page

Use the Create <Performance or Development> Documents page (EP_CREATEAPPR_EE) to enter parameters for generating documents as employees.

Note: (Fluid navigation collection) Refer to the [Create Document Page \(Performance\)](#) topic to create new documents as employees using the navigation collection from the fluid **Performance** tile.

Navigation:

- **Self Service > Performance Management > My Performance Documents > Create Performance Documents > Create Performance Documents**
- **Self Service > Performance Management > My Development Documents > Create Development Documents > Create Development Documents**

This example illustrates the fields and controls on the Create <document type> Documents page (employee).

Create Performance Documents

Complete the information in the *Document Creation Details* section below, then select **Create Documents** to generate your performance document.

Document Creation Details

Period Begin Date

Period End Date

Document Type

Create Documents

<i>Field or Control</i>	<i>Description</i>
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 <i>Yes</i> in the Create from Prior Document field.

Field or Control	Description
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 <i>No</i> 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.

(Classic) Accessing Documents

This topic provides overviews of ePerformance WorkCenter and discusses how to access documents in Classic Plus mode.

Note: A fluid version of ePerformance is now available to support employee performance reviews. For more information, see [Understanding Fluid ePerformance](#).

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.

Page Name	Definition Name	Usage
<u>Define Criteria Page</u> <u>Checkpoint <#> Page</u> <u>Finalize Criteria Page</u>	EP_APPR_BASE1	Perform business process tasks that are specific to the Define Criteria or Track Progress business processes on documents.
<u>Nominate Participants - Add Nominees Page</u>	EP_APPR_NOM_BUILD	Add participant nominations to documents.
<u>Nominate Participants - Track Nominations Page</u>	EP_APPR_NOM_TRACK	Track participant nominations submitted for documents.
<u><Manager or Self-> Evaluation Page</u> <u>Peer Evaluation Page</u>	EP_APPR_MAIN1	Evaluate documents.
<u>Overview Page</u>	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:

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" (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 Human Resources Administer Workforce).

See "(Classic) Reviewing and Updating Personal Information" (PeopleSoft 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:

From Fluid home pages:

Users who are members of the *ePerformance Manager Fluid* role have access to the Team Performance tile and can navigate to document pages for their teams from the navigation collection. Similarly, users

with the *ePerformance Employee Fluid* role have access to the Performance tile and can navigate to document pages for themselves as the employee or a participant of another individual's review.

- Manager Self Service (home page), Team Performance (tile), Current Documents, Current Documents
- Manager Self Service (home page), Team Performance (tile), Historical Documents, Historical Documents
- Employee Self Service (home page), Performance (tile), My Current Documents, My Current Documents
- Employee Self Service (home page), Performance (tile), My Historical Documents, My Historical Documents

For more information about accessing ePerformance document pages using tiles and navigation collections from Fluid self service home pages, see [Accessing Performance Documents as Employees Using Fluid Navigation Collection](#) and [Accessing Performance Documents as Managers Using Fluid Navigation Collection](#).

From the Navigator:

- **Manager Self Service > Performance Management > Performance Documents > Current Performance Documents**
- **Manager Self Service > Performance Management > Performance Documents > Historical Performance Docs**
- **Manager Self Service > Performance Management > Performance Documents > View Performance Documents**
- **Self Service > Performance Management > My Performance Documents > Current Performance Documents**
- **Self Service > Performance Management > My Performance Documents > Historical Performance Docs**
- **Workforce Development > Performance Management > Performance Documents > View Performance Documents**
- **Manager Self Service > Performance Management > Development Documents > Current Development Documents**
- **Manager Self Service > Performance Management > Development Documents > Historical Development Docs**
- **Manager Self Service > Performance Management > Development Documents > View Development Documents**
- **Self Service > Performance Management > My Development Documents > Current Development Documents**
- **Self Service > Performance Management > My Development Documents > Historical Development Docs**

- **Workforce Development > Performance Management > Development Documents > View Development Documents**

From the Related Actions menu available in various features:

- Performance Management, Open Performance Documents
- Performance Management, Open Development Documents

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” (Enterprise Components).

Video: [PeopleSoft WorkCenters](#)

Video: [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 Performance Documents > Current Performance Documents**
- **Manager Self-Service > Performance Management > Development Documents > Current Development Documents > Current Development Documents**
- **Self-Service > Performance Management > My Performance Documents > Current Performance Documents > Current Performance Documents**
- **Self-Service > Performance Management > Development Documents > Current Development Documents > Current Development Documents**
- (Related action) **Performance Management > Open Performance Documents**
- (Related action) **Performance Management > Open Development Documents**

This example illustrates the fields and controls on the Current <Performance or Development> Documents page.

Current Performance Documents

Listed are the current performance documents for which you are the Manager.

▼ **Filter Criteria**

First Name

Last Name

Document Type

Document Status

Period Between -

Performance Documents

1-29 of 29

Name	Document Type	Document Status [▲]	Period Begin	Period End	Job Title	Next Due Date
Cynthia Adams	Update Profile Management	Define Criteria	01/01/2000	12/01/2000	Officer-Loan	12/01/2000
Netty Owyang	Performance Document	Define Criteria	01/01/2009	12/31/2009	Manager-Accounting	12/31/2009
Cynthia Adams	Performance Document	Define Criteria	01/01/2009	12/31/2009	Corporate Controller	12/31/2009

This screenshot shows an example of the Current Performance Documents page that is accessed from the Manager Self Service navigator 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, the column showing employee names appears instead of the manager name. The grid lists all documents with statuses that are not *Complete* or *Canceled* for which you are the manager. Documents in the *Complete* or *Canceled* status are listed on the document history page for the corresponding document type. You can filter documents by name, document type, document status and review period.

The same also applies to development documents.

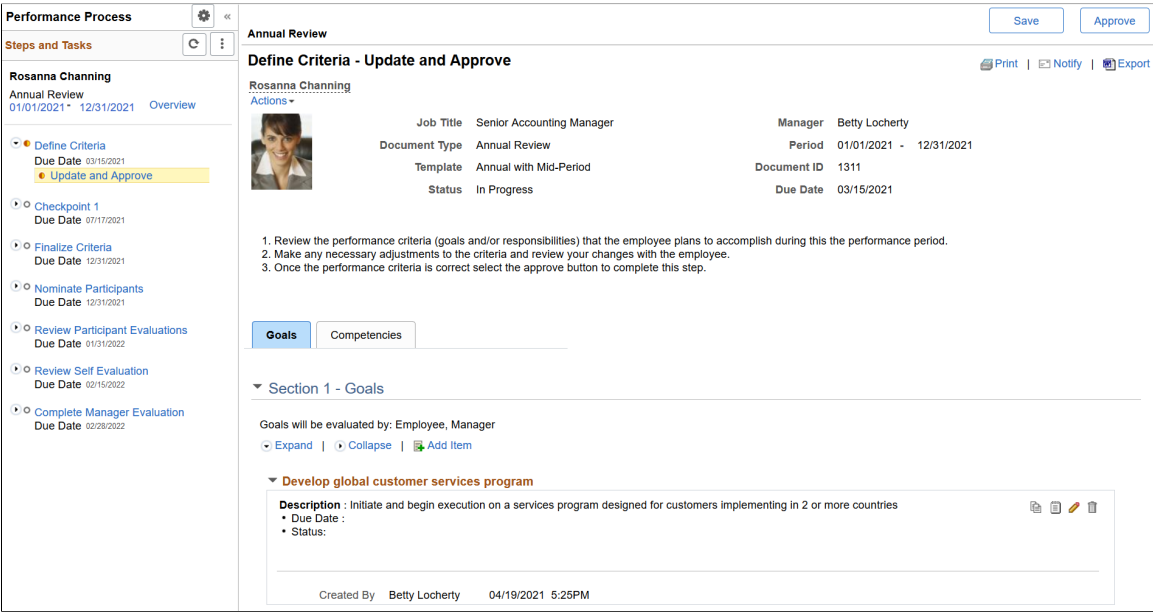
Define Criteria Page

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 Current <Performance or Development> Documents page from the Navigator, or the Current Documents or My Current Documents page from a Fluid home 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.

Field or Control	Description
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 eProfile Manager Desktop)

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.

Field or Control	Description
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 [Understanding Evaluation Criteria Modification](#).
- Checkpoint and Finalize Criteria steps, see [Understanding Mid-Period Checkpoints](#).
- Nominate Participants step, see [Understanding the Nomination and Tracking Processes](#).
- Self Evaluation (for employee), Manager Evaluation, and Participant Evaluations steps, see [Understanding Evaluation Data Entry](#).

Related Links

[Understanding Document Templates](#)

[Working With Delegations](#)

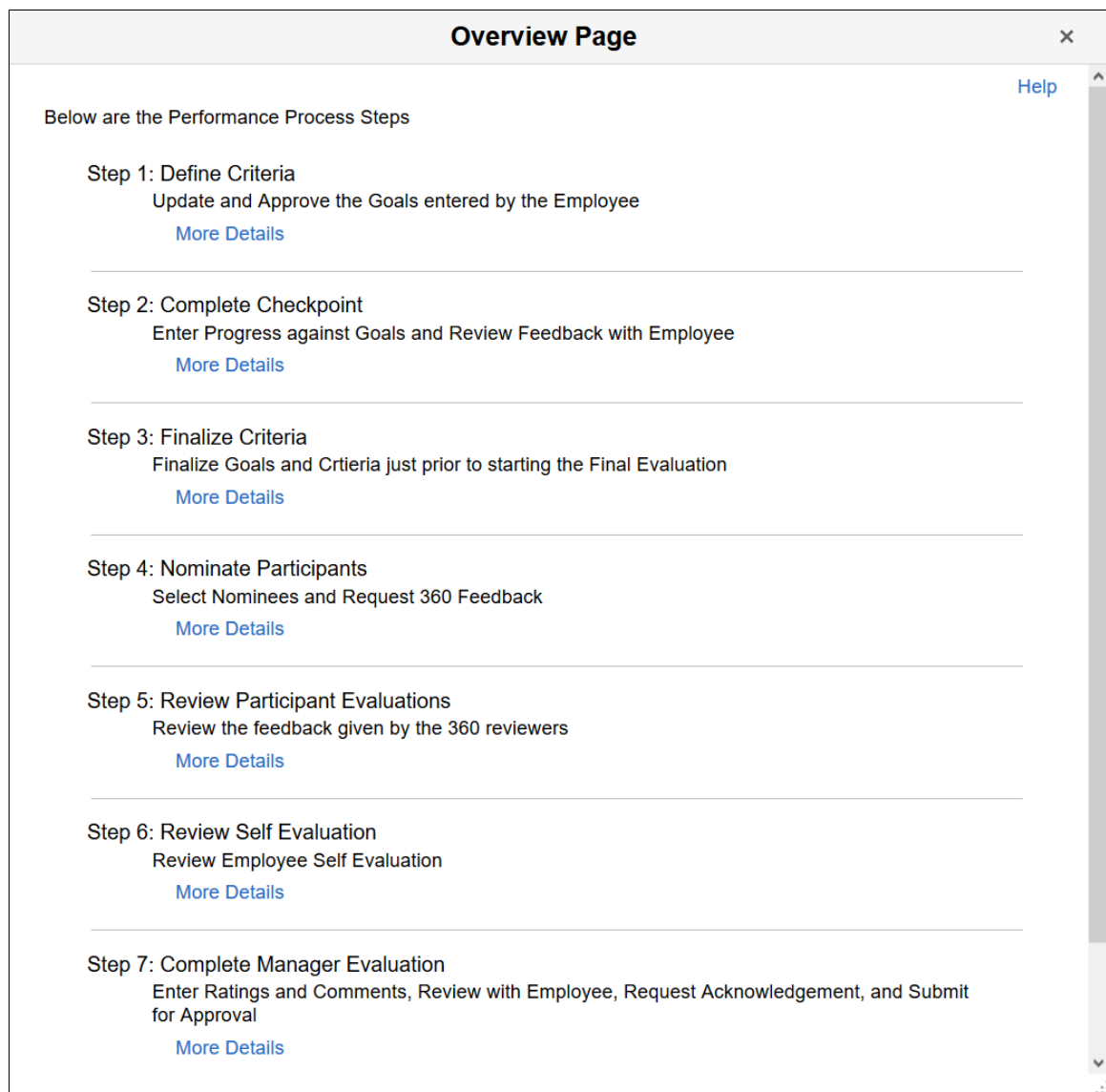
Overview Page

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.

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.

Accessing Performance Tasks and Documents Using Fluid Navigation Collection

Accessing Performance Tasks as Administrators Using Fluid Navigation Collection

This topic lists the pages that ePerformance administrators can access from the navigation collection of the **Performance Management** tile to manage templates, documents, profiles, and business objectives.

For general information about fluid pages in PeopleSoft HCM, see “Understanding PeopleSoft Fluid User Interface Homepages” (Application Fundamentals) and “Using the Talent Administrator Homepage” (Application Fundamentals).

Video: [Image Highlights, PeopleSoft HCM Update Image 17: Workforce Administrator and Talent Administrator Homepages](#)

Video: [PeopleSoft Fluid User Interface Experience in HCM](#)

Delivered Administrator Roles

Users must be members of the:

- *ePerformance HR Admin* role to access the **Performance Management** tile and most of its navigation collection entries.
- *ePerformance HR Admin Fluid* role to access **Auto Transfer Document Status** and **Objectives > Review Manager Cascaded Items**.
- *Profile Administrator* role to access **Profiles**.

Pages Used to Access Performance Tasks as Administrators Using Fluid Navigation Collection

<i>Page/Tile Name</i>	<i>Definition Name</i>	<i>Usage</i>
Performance Management Tile	HC_PERF_ADMIN_FL (cref for the tile)	Access administrator-specific pages to manage documents, profiles, and business objectives.

Page/Tile Name	Definition Name	Usage
- Create Performance Documents - Create Development Documents Create Documents Page	RUNCTL_EPMGRDOC	Create documents.
- Delete Performance Documents - Delete Development Documents Delete Documents Page	EP_APPR_SELECT	Delete documents.
- Reopen Performance Document - Reopen Development Document Reopen Document Page	EP_APPR_SELECT	Reopen documents.
- Transfer Performance Document - Transfer Development Document Transfer Document Page	EP_APPR_SELECT	Transfer documents.
- Cancel Performance Documents - Cancel Development Documents 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.

Page/Tile Name	Definition Name	Usage
Non-person Profiles “Non-person Profile Page” (PeopleSoft Human Resources Manage Profiles)	JPM_PROFILE1	Create and update non-person profiles.
Person Profiles “Person Profile Page” (PeopleSoft Human Resources Manage Profiles)	JPM_PROFILE_PERS	Create and update person profiles.
Search and Compare Profiles “Understanding Setting Up Search and Compare Profiles” (PeopleSoft 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 Human Resources Manage Profiles)	CM_PROFILE_SUMM	Match employee profiles.
Manage Business Objectives <u>Manage Business Objectives - Select Objective Plan Page</u>	EPO_PLAN_SELECT	Select an objective plan for update.
Create Objectives Summary Data <u>Create Objectives Summary Data Page</u>	EPO_ALIGN_EXT	Extract data by objective plan that the system will use to generate the Employees Aligned to Business Objectives metric.
<u>Review Manager Cascaded Items Page</u>	EPO_CASC_RUN_FL	Review a list of item cascading processes run by managers.
<u>Configure Performance Notes Page</u>	EP_NP_CONFIG_FL	Specify setup options for using performance notes by role.
Advance by Document Search <u>Advance by Document Search - Select Documents Page</u>	EP_APP_SEL_FL	Define criteria for selecting documents to advance.
Advance by Group/Department <u>Advance by Group/Department Page</u>	EP_RUN_ADV_DOC	Define selection criteria and the target status for advancing documents by group or department.

Page/Tile Name	Definition Name	Usage
Review Advanced Documents Review Advanced Documents - List Page	EP_ADV_RES_LST_FL	View a list of completed document advancement process instances.

Performance Management Tile

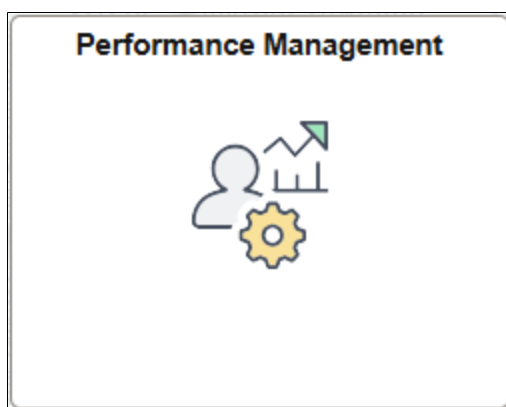
Use the Performance Management tile (HC_PERF_ADMIN_FL) to access groups of pages to manage templates, documents, profiles, and business objectives.

Navigation:

- The **Performance Management** tile is available on the sample HCM landing page, “My Work - Human Resources Section” (Application Fundamentals).
- Select *Talent Administrator* from the list of home pages. The **Performance Management** tile is available on the Talent Administrator landing page.

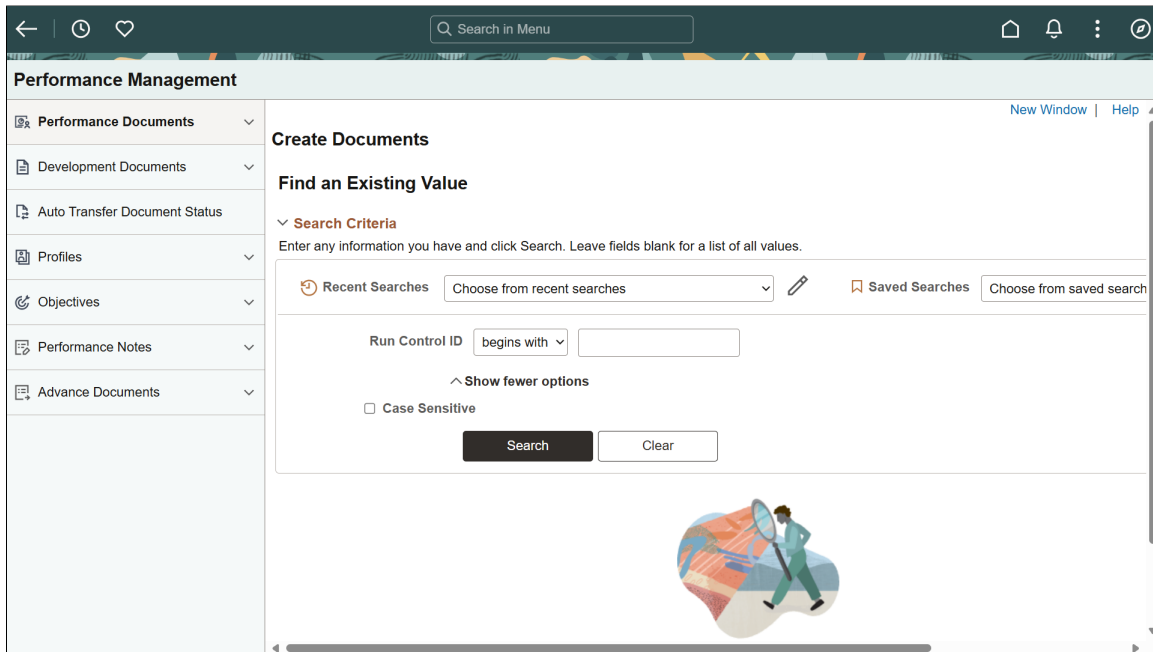
As an administrator, you can add the tile, through personalization, to another system-delivered home page or a home page that you create.

This example illustrates the Performance Management tile.



Select the **Performance Management** tile to access a collection of administrative transactions for ePerformance from one location.

This example illustrates the pages that are displayed on the Performance Management 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
- Performance Notes
- Advance Documents

Accessing Performance Documents as Managers Using Fluid Navigation Collection

This topic discusses a list of pages that ePerformance managers can access from the navigation collection of the **Team Performance** tile to work with documents of their teams.

- Refer to this topic for information about the **Team Performance** tile if the Fluid ePerformance functionality is *not* implemented in the system.

Managers who use the fluid **Team Performance** tile and navigation collection to access documents work with document pages in the Classic Plus style. It is different from Fluid ePerformance, in which

both the navigation to documents as well as document pages used in performance reviews are built in Fluid.

- Refer to [\(Fluid\) Accessing ePerformance Tiles and Pages](#) for information about the **Team Performance** tile if the Fluid ePerformance functionality is implemented in the system.

For more information about the Fluid ePerformance functionality, refer to the [Understanding Fluid ePerformance](#) topic.

For general information about fluid pages in PeopleSoft HCM, see “Understanding PeopleSoft Fluid User Interface Homepages” (Application Fundamentals) and “Using the Manager Self-Service Homepage” (Application Fundamentals).

Video: [PeopleSoft Fluid User Interface Experience in HCM](#)

Video: [Image Highlights, PeopleSoft HCM Update Image 29: ePerformance Fluid Administrative Component for Managers](#)

Delivered Manager Role

Users must be members of the *ePerformance Manager Fluid* role to access the **Team Performance** tile and its navigation collection.

Pages Used to Access Performance Documents as Managers Using Fluid Navigation Collection

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.

Page/Tile Name	Definition Name	Usage
<u>Transfer Documents Page (Team Performance)</u>	EP_MSSADM_SELECT_FL	Transfer documents to other managers.
<u>Select a Manager Page</u>	HR_PSEL_FLU	Select a manager for the document transfer.
<u>Transfer Documents - Confirmation Page (Team Performance)</u>	EP_MSSADM_CONF_FL	Review and confirm the document transfer.
<u>Reopen Documents Page (Team Performance)</u>	EP_MSSADM_SELECT_FL	Change the status of documents that are currently in the evaluation phase back to <i>Evaluation in Progress</i> .
<u>Reopen Documents - Confirmation Page (Team Performance)</u>	EP_MSSADM_CONF_FL	Review and confirm the status change of the selected documents back to <i>Evaluation in Progress</i> .
<u>Cancel Documents Page (Team Performance)</u>	EP_MSSADM_SELECT_FL	Cancel documents.
<u>Cancel Documents - Confirmation Page (Team Performance)</u>	EP_MSSADM_CONF_FL	Review and confirm the cancelation of selected documents.
<u>Delete Documents Page (Team Performance)</u>	EP_MSSADM_SELECT_FL	Delete canceled documents.
<u>Delete Documents - Confirmation Page (Team Performance)</u>	EP_MSSADM_CONF_FL	Review and confirm the deletion of selected documents.
<u>Enter Preliminary Ratings Page (Team Performance)</u>	EP_MSSADM_CONF_FL	Enter preliminary performance ratings for documents that are currently in progress.
<u>View-Only Documents - Select Employee Page (Team Performance)</u>	HR_PSEL_FLU	Select employees and review their documents.
<u>View-Only Documents - Document List Page (Team Performance)</u>	EP_MSS_VIEWONLY_FL	View the list of documents for the selected employee.
<u>Create Documents by Group - Select Group Page (Team Performance)</u>	HR_PSEL_GROUP_FL	Select a group of employees for whom documents are created.
<u>Create Documents by Group - Team Members Page (Team Performance)</u>	HR_PSEL_FLU	Select employees from the selected group for whom documents are created.
<u>Create Documents by Group - Document Creation Details Page (Team Performance)</u>	EP_CREATE_MSS_FLU	Select the document template and dates that are used to create documents.

Page/Tile Name	Definition Name	Usage
<u>Create Documents by Group - Results Page (Team Performance)</u>	EP_CREATE_M_RS_FLU	View the document creation results.
<u>Team Performance Status Tile</u>	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.
<u>Team Performance Status Page</u>	EP_PG_DOCSTS_FLU	View the performance status of the documents in details, and modify chart displays if necessary.
<u>Change Settings Page</u>	EP_PG_CHNG_SET_SCF	Edit the default settings used for launching the Performance Status page.

Team Performance Tile

Use the Team Performance tile (HC_EP_MSS_SELECT_FLU_GBL) to view the total count of current documents that are owned by and delegated to the logged-in manager.

Navigation:

Select *Manager Self Service* from the list of home pages. The **Team Performance** tile is available on the Manager Self Service landing page.

As a manager, you can add the tile, through personalization, to another system-delivered home page or a home page that you create.

This example illustrates the Team Performance tile.



If no current documents are available, no document count is displayed on the **Team Performance** tile.

Select 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

Note: The system uses the **Display in Document List** option in the document type setup to determine which documents to display in document lists for current documents, delegated documents, and historical documents. If the option is selected for the Manager role on the [Document Types Page](#), documents that belong to this document type will be displayed.

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:

Select 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.

This example illustrates the fields and controls on the Current Documents page (Team Performance) for the tablet, including the navigation collection.

The screenshot displays the 'Current Documents' page within a tablet application. The top navigation bar includes a back arrow, 'Manager Self Service', and the page title 'Team Performance'. On the left, a navigation menu lists options: 'Current Documents' (highlighted), 'Delegated Documents', 'Historical Documents', 'Administrative Tasks', 'View-Only Documents', and 'Create Documents by Group'. The main content area is titled 'Current Documents' and features a 'Create Documents' button. Below this is a table with the following columns: 'Name / Job Title', 'Document Type', 'Document Status', 'Period Begin / Period End', and 'Next Due Date'. The table lists four documents:

Name / Job Title	Document Type	Document Status	Period Begin / Period End	Next Due Date
Rosanna Channing Senior Accounting Manager	Annual Review	Define Criteria	01/01/2021 12/31/2021	03/15/2021
Rosanna Channing Senior Accounting Manager	Development Documents	Evaluation in Progress	11/01/2015 11/30/2015	11/30/2015
Susan Hoinck Senior Financial Analyst	Development Evaluation	Define Criteria	01/01/2015 12/31/2015	12/31/2015
Cynthia Adams Corporate Controller	Test App for Mgr only	Approval - Submitted	01/01/2015 12/31/2015	12/31/2015

The interface also includes a filter icon and a '37 rows' indicator at the top right of the table area.

This example illustrates the fields and controls on the Current Documents page (Team Performance) for the smartphone.

Current Documents	
39 rows	
+	↕
Cynthia Adams Development Evaluation Define Criteria > 01/01/2021 - 12/31/2021 Next Due Date 12/31/2021	
Courtney Osborn Development Evaluation Define Criteria > 01/01/2021 - 12/31/2021 Next Due Date 12/31/2021	
Rosanna Channing Annual Review Define Criteria >	
Rosanna Channing Development Documents Evaluation in Progress > 11/01/2015 - 11/30/2015 Next Due Date 11/30/2015	

(Smartphone) To return to the navigation menu, select 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

Select a row to open the corresponding document for edits in the ePerformance WorkCenter. From the WorkCenter, you can select the Team Performance button on the page banner to return to the Team Performance page.

Field or Control	Description
 Create Documents or	Select the button to access the Create Document page to create new documents as a manager.
	Select 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.
	Select 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.”

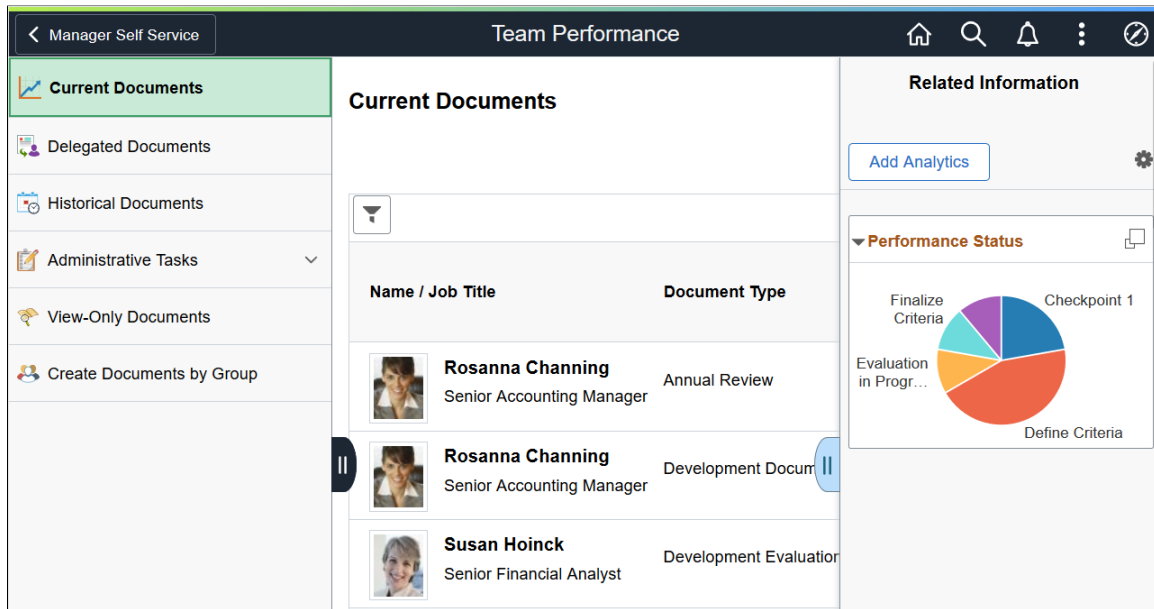
Video: [Image Highlights, PeopleSoft HCM Update Image 18: Simplified Analytics](#)

Video: [PeopleSoft Simplified Analytics](#)

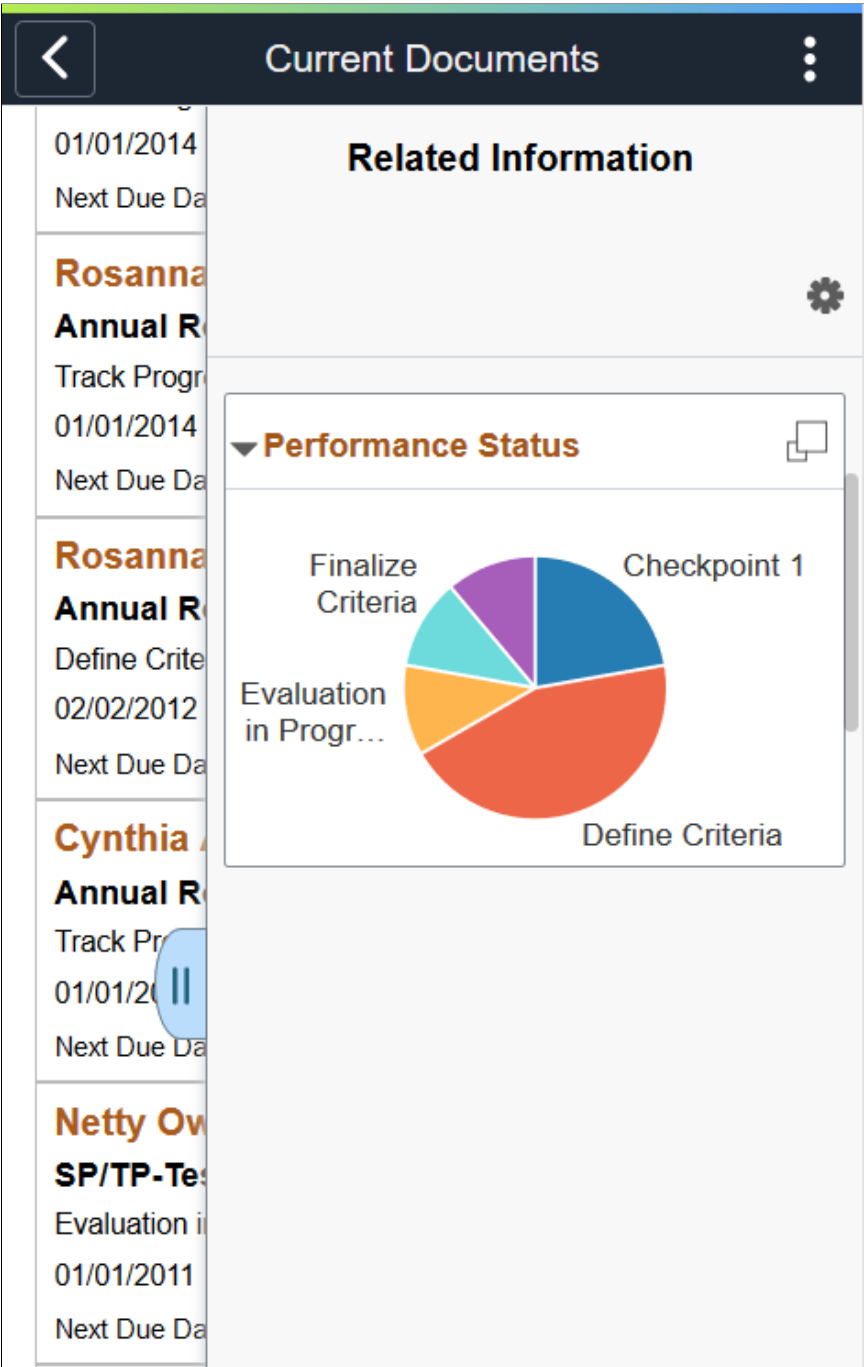
Navigation:

Select the Supplementary Panel tab on the Current Documents, Delegated Documents or Historical Documents page.

This example illustrates the supplementary panel for Team Performance for the tablet.



This example illustrates the supplementary panel for Team Performance for the smartphone.



Field or Control	Description
 (Supplementary Panel tab)	Select this tab to open the Related Information panel.

Field or Control	Description
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 <i>PeopleTools: Pivot Grid</i>, “Working with Simplified Analytics,” Accessing Simplified Analytics.
Add Analytics	Select the button to create a new simplified analytics chart using the Create Analytics Wizard. The delivered role <i>PivotGridSuperUser</i> gives users the ability to create and publish reports. For information on how to create simplified analytics, see <i>PeopleTools: Pivot Grid</i>, “Working with Simplified Analytics,” Creating Simplified Analytics.
 [Personalize RC (Related Content) icon]	This icon appears at the top of the Related Information panel. Select 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]	Select 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. Select 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:

Select the **Create Documents** button or **Add** icon on the Current Documents 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.

For an explanation of fields and controls on this page, see the "(Fluid) <Transaction Name> - Find Team Member Page" (Application Fundamentals).

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:

Select the **Continue** button on the Select Employee(s) page.

This example illustrates the fields and controls on the Create Documents page (Team Performance).

Back

Create Documents

Create

Period Begin Date

01/01/2021

Period End Date

12/31/2021

Document Type

Annual Review

Template

Annual with Mid-Period

Selected Employees

Employee Photograph	Name	Job Title	
	Cynthia Adams	Corporate Controller	

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.

Field or Control	Description
Create	Select 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. Select 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:

Select the **Delegated Documents** tab on the left panel of the Team Performance page.

This example illustrates the fields and controls on the Delegated Documents page (Team Performance). The navigation collection is collapsed.

Delegated Documents				
Documents for Rosanna Channing				
12 rows				
Name / Job Title	Document Type	Document Status	Period Begin / Period End	Next Due Date
 John Patterson Manager-Revenue	Annual Review	Track Progress - Checkpoint 1	01/01/2021 12/31/2021	09/22/2021 >
 Julie Kijewski Clerk	Performance Document	Define Criteria	01/01/2008 12/31/2008	12/31/2008 >
 David Ho Senior Financial Analyst	Annual Review	Define Criteria	01/01/2021 01/01/2021	06/15/2020 >
 Shawn Quilligan Financial Analyst	Annual Review	Define Criteria	01/01/2021 12/31/2021	06/14/2021 >

(Smartphone) To return to the navigation menu, select 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.

Field or Control	Description
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.

Select a row to open the corresponding document for review in the ePerformance WorkCenter. From the WorkCenter, you can select 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:

Select the **Historical Documents** tab on the left panel of the Team Performance page.

This example illustrates the fields and controls on the Historical Documents page (Team Performance). The navigation collection is collapsed.

Historical Documents				
Name / Job Title		Document Type	Document Status	Period Begin / Period End
	Rosanna Channing Senior Accounting Manager	Annual Review	Completed	01/01/2020 12/31/2020 >
	Rosanna Channing Senior Accounting Manager	Annual Review	Completed	01/01/2019 12/31/2019 >
	Shawn Quilligan Financial Analyst	Project Review	Canceled	01/01/2019 02/28/2019 >

(Smartphone) To return to the navigation menu, select 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

Select a row to open the corresponding document for review in the ePerformance WorkCenter. From the WorkCenter, you can select 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:

- Select **Administrative Tasks** and then the **Transfer Documents** tab on the left panel of the Team Performance page.
- (Fluid ePerformance tile navigation) Team Performance Tile, then Administrative Tasks Tile. Select the **Transfer Documents** tab on the left panel of the Administrative Tasks page.

This example illustrates the fields and controls on the Transfer Documents page (Team Performance). The navigation collection is collapsed.

Transfer Documents

Next >

To transfer a document to a different manager, select the document(s), then select the Next button to choose the receiving manager. Only current documents can be transferred.

6 rows

☐	Name / Job Title	Document Type	Document Status	Period Begin / Period End
☐	 Abigail Smith Billing Specialist	Annual Review	Define Criteria	01/01/2024 12/31/2024
☐	 Abigail Smith Billing Specialist	Annual Review	Evaluation in Progress	01/01/2023 12/31/2023
☐	 Alex Duncan Accountant	Annual Review	Pending Acknowledgement	01/01/2023 12/31/2023

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 select 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:

Select the **Next** button on the Transfer Documents page.

This example illustrates the fields and controls on the Select a Manager page.

Select a Manager

×

Search Results

3 rows


Rosanna Channing

>

Job Title	Department	Location
Senior Accounting Manager	Corporate Accounting	Corporation Headquarters
ACName		

Enter keywords in the search field to find the new manager for the transfer. Select the match from the search results.

For an explanation of fields and controls on this page, see the “(Fluid) Person Search Page” (Application Fundamentals).

Transfer Documents - Confirmation Page (Team Performance)

Use the Transfer Documents - Confirmation page (EP_MSSADM_CONF_FL) to review and confirm the document transfer.

Navigation:

Select a manager row for the transfer on the Select a Manager page.

This example illustrates the fields and controls on the Transfer Documents - Confirmation page (Team Performance).

Transfer Documents

< Previous

Save

You have chosen to transfer the document(s) listed to another manager.
To select or change the receiving manager, use the "Select Manager" button. To complete the transfer select the Save button.
If your document has performance notes linked to it, select the Notes link to view or transfer your notes.

New Manager Rosanna Channing

Select Manager

1 row

Name / Job Title	Document Type	Document Status	Period Begin / Period End	Notes to Transfer
 Abigail Smith Billing Specialist	Annual Review	Define Criteria	01/01/2024 12/31/2024	0 / 1 Selected

↑ Back to Top

The grid on this page lists the selected documents and the receiving manager for the transfer.

Field or Control	Description
Save	Select to complete the transfer of documents (and selected document notes if applicable).
Select Manager	Select to choose a different manager for the transfer if necessary.
Notes to Transfer	Use this link to view or select notes to be transferred along with their document on the Transfer Notes Page. It displays the number of notes (if available) that are associated with the document and how many of them are selected for transfer. Link example: <i>0/2 Selected</i> (0 of 2 notes selected) This link appears if the document contains performance notes, and the Allow Transfers option is enabled for managers on the Configure Performance Notes Page. Additional instructional text is displayed for viewing or transferring document notes.

Transfer Notes Page

Use the Transfer Notes page (EP_NP_XFER_SEL_SCF) to view or select notes to be transferred with documents.

Navigation:

Select the notes to transfer link of a document on the Transfer Documents - Confirmation page.

This example illustrates the fields and controls on the Transfer Notes page.

Notes		1 row
☐ Subject / Text	Created	
☐ Certification Received project management certificate.	03/12/2025 1:11PM	

The Transfer Notes page lists the notes that are associated with the document. Review and select notes to be transferred along with the document to the new manager.

Select **Done** to transfer ownership of selected notes with the document. Select **Cancel** to not include any notes in the document transfer.

Note: For notes that are not selected to be transferred with their documents to the new manager, they become standalone historical notes that are available on the [Performance Notes Page](#) or [My Performance Notes Page \(Note List\)](#) to the old manager.

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:

- Select **Administrative Tasks** and then the **Reopen Documents** tab on the left panel of the Team Performance page.
- (Fluid ePerformance tile navigation) [Team Performance Tile](#), then [Administrative Tasks Tile](#). Select the **Reopen Documents** tab on the left panel of the Administrative Tasks page.

This example illustrates the fields and controls on the Reopen Documents page (Team Performance). The navigation collection is collapsed.

Reopen Documents

Next

To change the status of a document back to "Evaluation in Progress", select the document(s) and then select the Next button.
Only documents with a status of "Shared with Employee", "Pending Acknowledgement", "Acknowledged" or "Approval" (with Approval Status of "Submitted" or "Approved") can be changed back to "Evaluation in Progress" status.

4 rows

☐

Name / Job Title

Document Type

Document Status

Period Begin / Period End

☐

 **Carmichael Espinosa**
Consultant-Senior

Project Review

Shared with Employee

06/15/2002
12/31/2002

☐

 **Connie Chung**
Auditor-General

Annual Review

Shared with Employee

01/01/2002
12/31/2002

☐

 **Cynthia Adams**
Corporate Controller

Test App for Mgr only

Approval - Submitted

01/01/2015
12/31/2015

☐

 **Susan Hoinck**
Analyst-Business

Development Documents

Approval - Submitted

01/01/2009
12/31/2009

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 select 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:

Select the **Next** button on the Reopen Documents page.

This example illustrates the fields and controls on the Reopen Documents - Confirmation page (Team Performance). The navigation collection is collapsed.

Reopen Documents

Previous

Save

You have chosen to change the status of the document(s) listed.
To confirm this status change, select the Save button.

1 row

Name / Job Title	Document Type	Document Status	Period Begin / Period End
 Carmichael Espinosa Consultant-Senior	Project Review	Shared with Employee	06/15/2002 12/31/2002

The grid on this page lists the selected documents to be reopened. Select 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:

- Select **Administrative Tasks** and then the **Cancel Documents** tab on the left panel of the Team Performance page.
- (Fluid ePerformance tile navigation) Team Performance Tile, then Administrative Tasks Tile. Select the **Cancel Documents** tab on the left panel of the Administrative Tasks page.

This example illustrates the fields and controls on the Cancel Documents page (Team Performance). The navigation collection is collapsed.

Cancel Documents

Next

To cancel a document, select the document(s) and then select the Next button.
Only documents with a status of "Define Criteria", "Track Progress" or "Evaluation in Progress" can be canceled.

33 rows

☐	Name / Job Title	Document Type	Document Status	Period Begin / Period End
☐	 Adland Chu Clerk-Payroll Sr	Developmental Document	Evaluation in Progress	10/01/2004 12/31/2004
☐	 Adland Chu Clerk-Payroll Sr	Performance Document	Define Criteria	01/01/2004 12/31/2004
☐	 Allan Martin Project Manager	Update Profile Management	Evaluation in Progress	01/01/2001 12/01/2001

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 select 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:

Select the **Next** button on the Cancel Documents page.

This example illustrates the fields and controls on the Cancel Documents - Confirmation page (Team Performance). The navigation collection is collapsed.

Cancel Documents

Previous
Save

You have chosen to cancel the document(s) listed.
To confirm this cancellation, select the Save button.

1 row

Name / Job Title	Document Type	Document Status	Period Begin / Period End
 Angela McKay Auditor-General	Annual Review	Evaluation in Progress	01/01/2002 12/31/2002

The grid on this page lists the selected documents to be canceled. Select the **Save** button to complete the transaction.

Delete Documents Page (Team Performance)

Use the Delete Documents page (EP_MSSADM_SELECT_FL) to delete canceled documents.

Navigation:

- Select **Administrative Tasks** and then the **Delete Documents** tab on the left panel of the Team Performance page.
- (Fluid ePerformance tile navigation) Team Performance Tile, then Administrative Tasks Tile. Select the **Delete Documents** tab on the left panel of the Administrative Tasks page.

This example illustrates the fields and controls on the Delete Documents page (Team Performance). The navigation collection is collapsed.

Delete Documents
Next

To delete a document, select the document(s) and then select the Next button.
Only documents with a status of "Canceled" can be deleted.

3 rows

☐

Name / Job Title

Document Type

Document Status

Period Begin / Period End

☐



Shawn Quilligan
Financial Analyst

Project Review

Canceled

01/01/2019
02/28/2019

☐



Susan Hoinck
Analyst-Business

Mgr clones Dev Doc

Canceled

01/01/2005
12/31/2005

☐



Vicki Zinn
Accountant

Project Review

Canceled

01/01/2019
02/28/2019

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 select 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:

Select the **Next** button on the Delete Documents page.

This example illustrates the fields and controls on the Delete Documents - Confirmation page (Team Performance). The navigation collection is collapsed.

Delete Documents
Previous
Save

You have chosen to delete the document(s) listed.
To confirm this delete, select the Save button.

1 row

☐

Name / Job Title

Document Type

Document Status

Period Begin / Period End



Susan Hoinck
Analyst-Business

Mgr clones Dev Doc

Canceled

01/01/2005
12/31/2005

The grid on this page lists the selected documents to be deleted. Select 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:

- Select **Administrative Tasks** and then the **Enter Preliminary Rating** tab on the left panel of the Team Performance page.
- (Fluid ePerformance tile navigation) Team Performance Tile, then Administrative Tasks Tile. Select the **Enter Preliminary Rating** tab on the left panel of the Administrative Tasks page that appears.

This example illustrates the fields and controls on the Enter Preliminary Ratings page (Team Performance). The navigation collection is collapsed.

Enter Preliminary Ratings

Save

Listed are the in-progress documents for which you are the manager.
Enter the new preliminary ratings, then select the Save button.

9 rows

Name / Job Title	Document Type	Document Status	Period Begin / Period End	Preliminary Rating
 Cynthia Adams Corporate Controller	Annual Review	Define Criteria	01/01/2023 12/31/2023	★★★★★ Company Maker Numeric Rating 5.00
 Tina Palisco Manager-Accounting	Annual Review	Define Criteria	01/01/2023 12/31/2023	★★★★★ Company Maker Numeric Rating 5.00

See [Enter Preliminary Ratings Page](#).

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:

- Select the **View-Only Documents** tab on the left panel of the Team Performance page.
- (Fluid ePerformance tile navigation) Team Performance Tile, then Administrative Tasks Tile. Select the **View-Only Documents** tab on the left panel of the Administrative Tasks page that appears.

This example illustrates the fields and controls on the View-Only Documents - Select Employee page (Team Performance). The navigation collection is collapsed.

View-Only Documents

▼ **Find Team Member**

Team Member

As Of

Team Members 13 rows

Cynthia Adams KU0101

Job Title	Department	Type
Corporate Controller	Corporate Accounting	Employee

[2 Directs](#)

Use this page search for an employee in your reporting organization for whom the documents are displayed.

For an explanation of fields and controls on this page, see the “(Fluid) <Transaction Name> - Find Team Member Page” (Application Fundamentals).

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:

Select an employee row on the View-Only Documents - Select Employee page.

This example illustrates the fields and controls on the View-Only Documents - Document List page (Team Performance). The navigation collection is collapsed.

View-Only Documents					
Listed are the documents for the employee you selected.					
10 rows					
Name / Job Title	Document Type	Document Status	Period Begin / Period End	Manager	Rating
 Cynthia Adams Corporate Controller	Test App for Mgr only	Approval - Submitted	01/01/2015 12/31/2015	Betty Locherty	90-15-Meets Expectations >
 Cynthia Adams Corporate Controller	Core_Development_Select Mentor	Define Criteria	01/01/2015 11/30/2015	Betty Locherty	>

The grid on this page lists all the documents created for the selected employee, with the exception of the deleted ones. Select 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:

- Select the **Create Documents by Group** tab on the left panel of the Team Performance page.
- (Fluid ePerformance tile navigation) Team Performance Tile, then Administrative Tasks Tile. Select the **Create Documents by Group** tab on the left panel of the Administrative Tasks page that appears.

This example illustrates the fields and controls on the Create Documents by Group - Select Group page (Team Performance). The navigation collection is collapsed.

Create Documents by Group	
Select Group	
25 rows	
Group Id ◇	Description ◇
HXPSGRP1	Merit Increase Group
HXPSGRP10	PlanSal Group
HXPSGRP11	Merit Inc Gp
HXPSGRP12	Sal Plan Unoffc
HXPSGRP13	PS Unoffc
HXPSGRP2	Merit Increase Group

Select a group row for which documents are to be created.

Create Documents by Group - Team Members Page (Team Performance)

Use the Create Documents by Group - Team Members page (HR_PSEL_FLU) to select employees from the selected group for whom documents are created.

Navigation:

Select a group row on the Create Documents by Group - Select Group page.

This example illustrates the fields and controls on the Create Documents by Group - Team Members page (Team Performance). The navigation collection is collapsed.

The screenshot shows the 'Create Documents by Group' page. At the top, there is a 'Find Team Member' section with a search bar labeled 'Enter Name, Title or Email', an 'As Of' date field set to '06/11/2021', and a 'Search' button. A 'Continue' button is located in the top right corner. Below the search section, there is a 'Team Members' table with 6 rows. The first row is for Courtney Osborn, and the second row is for Cynthia Adams. Each row includes a checkbox, a profile picture, the employee's name, job title, department, job code, and type.

Team Members							6 rows
☐							⬆⬆
☐		KU0100 Courtney Osborn	Job Title Auditor-General	Department 13000	Job Code 200005	Type Employee	
☐		KU0101 Cynthia Adams	Job Title Corporate Controller	Department 13110	Job Code 600165	Type Employee	

Select one or more employees from the group for whom documents are created.

For an explanation of fields and controls on this page, see the “(Fluid) <Transaction Name> - Find Team Member Page” (Application Fundamentals).

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:

Select the **Continue** button on the Create Documents by Group - Select Employees page.

This example illustrates the fields and controls on the Create Documents by Group - Document Creation Details page (Team Performance). The navigation collection is collapsed.

Create Documents by Group

CreateCancel

Period Begin Date

Period End Date

Document Type

Selected Employees

Name	Job Title
Courtney Osborn	Auditor-General
Cynthia Adams	Corporate Controller

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. Select 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:

Select the **Create** button on the Create Documents by Group - Document Creation Details page.

This example illustrates the fields and controls on the Create Documents by Group - Results page (Team Performance). The navigation collection is collapsed.

Create Documents by Group			
Create Documents - Results			
Name	Template	Successful Creation?	Reason
Courtney Osborn	Development Plan	Yes	Document created successfully
Cynthia Adams	Development Plan	Yes	Document created successfully

Use this page to view the document creation results.

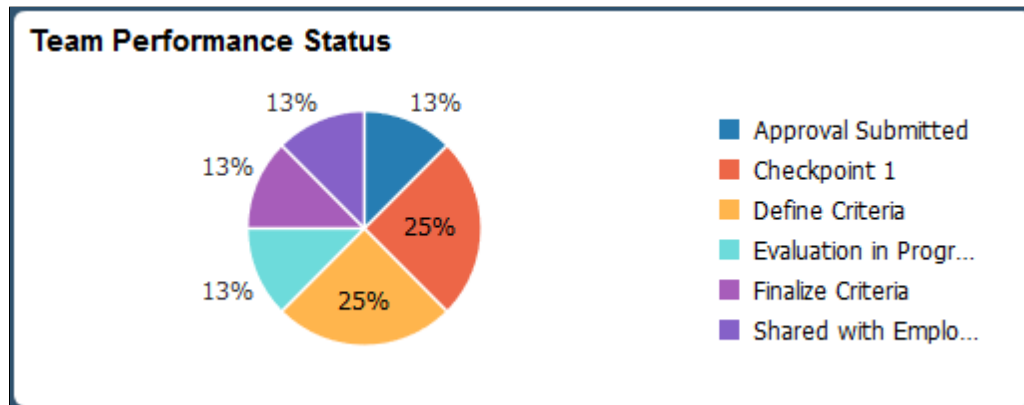
Team Performance Status Tile

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).

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. Select 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.

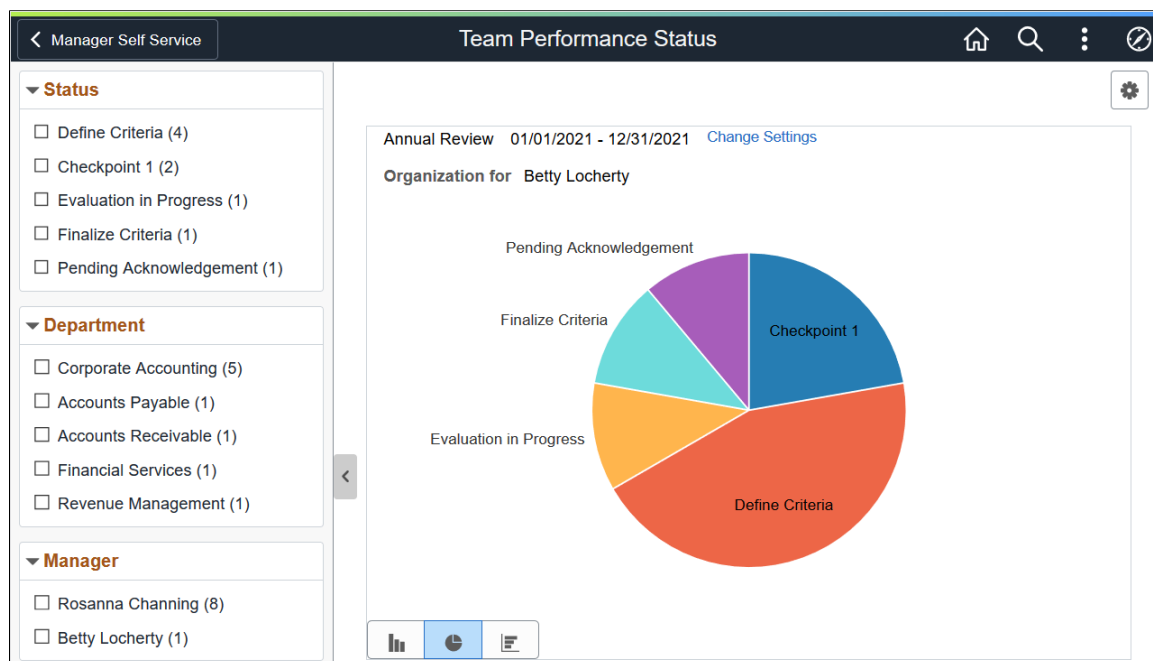
Team Performance Status Page

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.

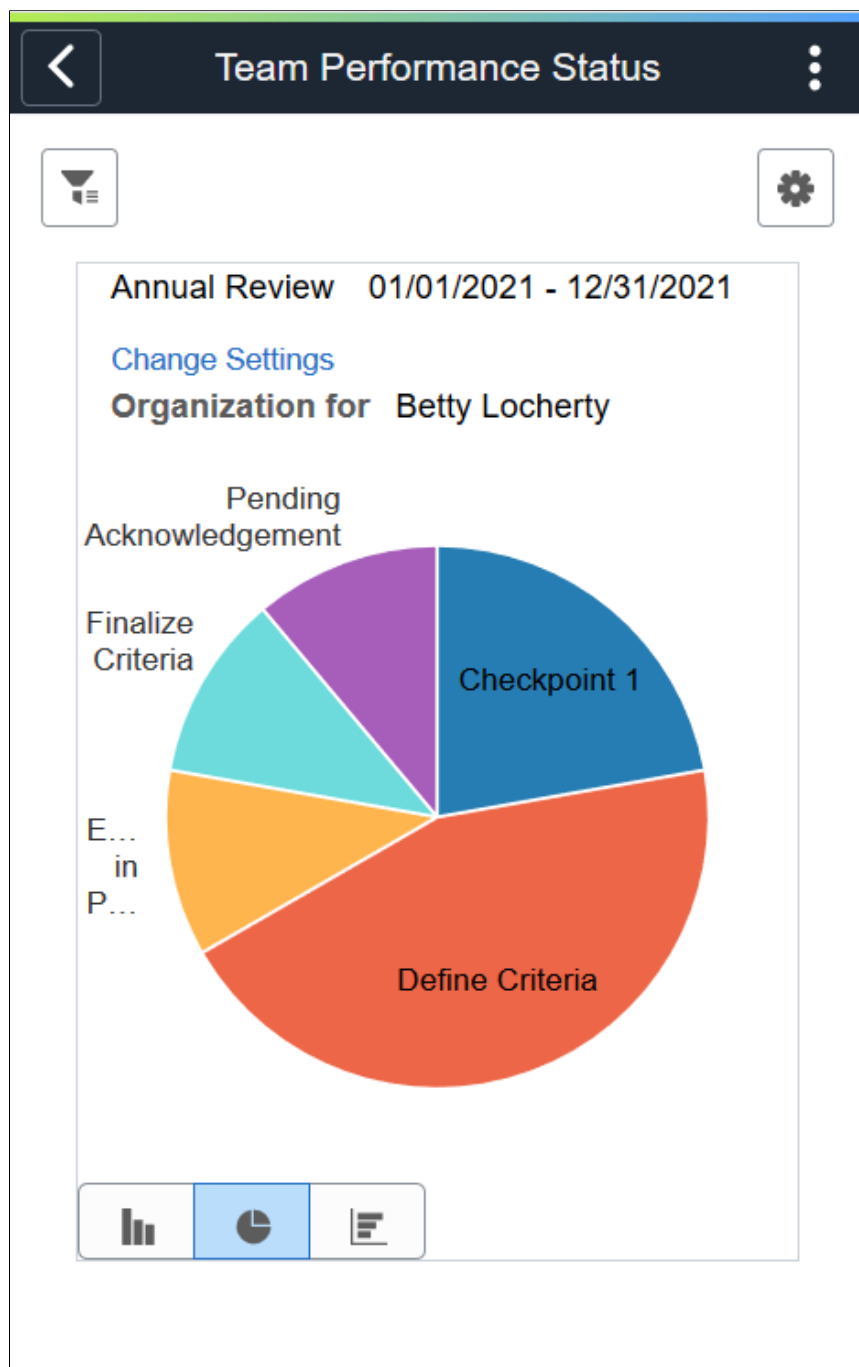
Navigation:

Select the **Team Performance Status** tile on the Manager Self Service page or a home page where the tile is added.

This example illustrates the fields and controls on the Team Performance Status page for the tablet.



This example illustrates the fields and controls on the Team Performance Status page for the smartphone.



Video: [ePerformance Team Performance Status Chart](#)

This page mimics the “My Team’s Performance Status Pagelet” (PeopleSoft 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.

Field or Control	Description
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.
	Select 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.
	Select 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 <i>Status</i>, <i>Manager</i>, <i>Location</i> and <i>Department</i> filters are enabled. - Export data to spreadsheets. - Edit chart options. See the <i>Viewing a Pivot Grid Model Using the Pivot Grid Viewer</i> topic in <i>PeopleTools: Pivot Grid</i> for more information on using the chart options.
Change Settings	Select 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.
- Select pie segments to view document details of corresponding statuses in a modal window.

- Open documents for edits or viewing from the modal window.

Field or Control	Description
	Select to display data in the chart type represented by the icon. Available chart types include vertical bar, pie (default value) and horizontal bar.

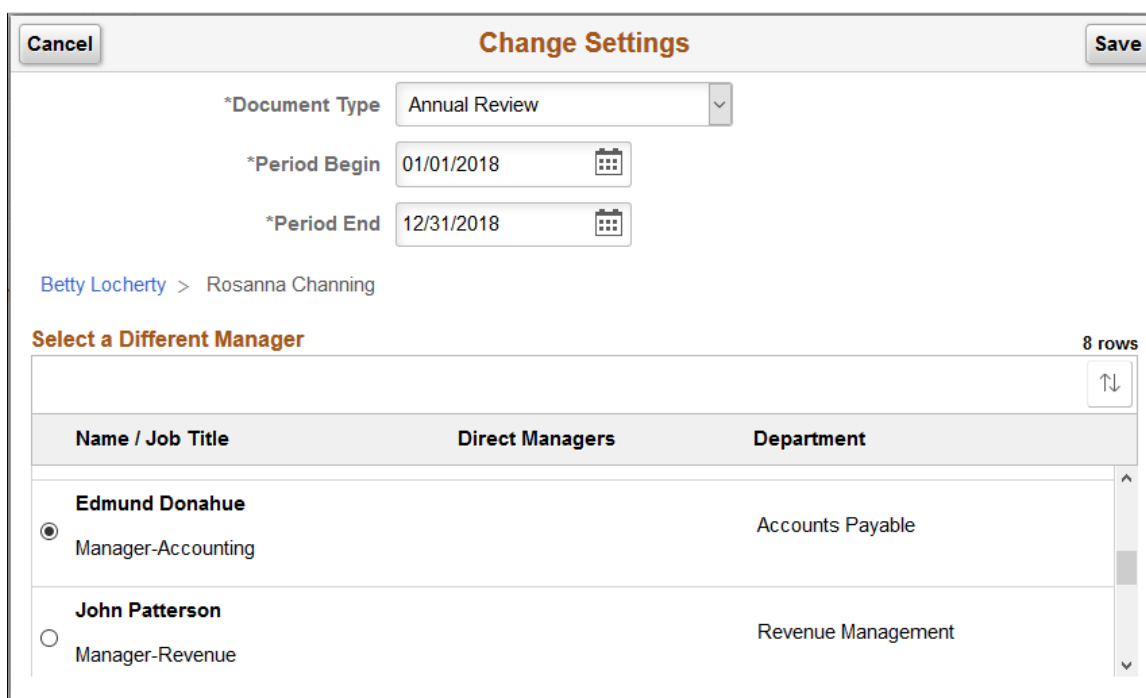
Change Settings Page

Use the Change Settings page (EP_PG_CHNG_SET_SCF) to edit the default settings used for launching the Team Performance Status page.

Navigation:

Select the **Change Settings** link on the Team Performance Status page.

This example illustrates the fields and controls on the Change Settings page.



Change Settings

*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.

Field or Control	Description
<name link> and <organization hierarchy>	Select 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, select the **Direct Managers Count** icon to expand the organizational hierarchy of that other manager, and select the person of your choice.

Accessing Performance Documents as Employees Using Fluid Navigation Collection

This topic discusses a list of pages that ePerformance employees can access from the navigation collection of the **Performance** tile to work with their documents.

- Refer to this topic for information about the **Performance** tile if the Fluid ePerformance functionality is *not* implemented in the system.

Employees who use the fluid **Performance** tile and navigation collection to access documents work with document pages in the Classic Plus style. It is different from Fluid ePerformance, in which both the navigation to documents as well as document pages used in performance reviews are built in Fluid.

- Refer to [\(Fluid\) Accessing ePerformance Tiles and Pages](#) for information about the **Performance** tile if the Fluid ePerformance functionality is implemented in the system.

For more information about the Fluid ePerformance functionality, refer to the [Understanding Fluid ePerformance](#) topic.

For general information about fluid pages in PeopleSoft HCM, see “Understanding PeopleSoft Fluid User Interface Homepages” (Application Fundamentals) and “Using the Employee Self-Service Homepage” (Application Fundamentals).

Video: [PeopleSoft Fluid User Interface Experience in HCM](#)

Delivered Employee Role

Users must be members of the *ePerformance Employee Fluid* role to access the **Performance** tile and its navigation collection.

Pages Used to Access Performance Documents as Employees Using Fluid Navigation Collection

<i>Page/Tile Name</i>	<i>Definition Name</i>	<i>Usage</i>
<u>Performance Tile</u>	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.
<u>My Current Documents Page</u>	EP_EE_SELECT_FLU	Access the employee's own current documents.
<u>Create Document Page (Performance)</u>	EP_CREATE_FLU_SCF	Add new ePerformance documents.
<u>My Historical Documents Page</u>	EP_EE_SELECT_FLU	Access completed or canceled documents that are owned by the employee.
<u>Evaluations of Others Page</u>	EP_EE_SELECT_FLU	Accept or decline evaluation requests, or work on accepted evaluations.
<u>Historical Evaluations of Others Page</u>	EP_EE_SELECT_FLU	Access evaluation documents for others that are completed by the employee.

Performance Tile

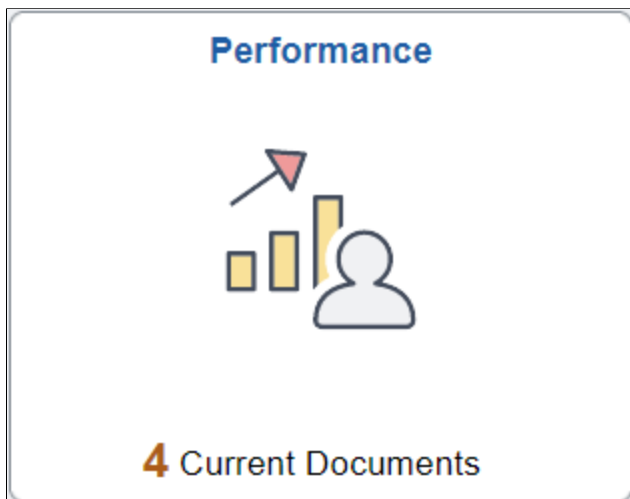
Use the Performance tile (EP_EE_TILE_FLU) to view the total count of evaluation requests or current documents for the logged-in employee.

Navigation:

Select *Employee Self Service* from the list of home pages. The **Performance** tile is available on the Employee Self Service landing page.

As an employee, you can add the tile, through personalization, to another system-delivered home page or a home page that you create.

This example illustrates the Performance tile.



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.

Select 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

Note: The system uses the **Display in Document List** option in the document type setup to determine which documents to display in document lists for current documents and historical documents. If the option is selected for the Employee role on the [Document Types Page](#), documents that belong to this document type will be displayed.

Evaluations of Others document lists are not affected by this display option.

My Current Documents Page

Use the My Current Documents page (EP_EE_SELECT_FLU) to access the employee's own current documents.

Navigation:

- Select 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.

- Select *Performance* from the related actions menu.

This example illustrates the fields and controls on the My Current Documents page for the tablet.

Employee Self Service
Performance

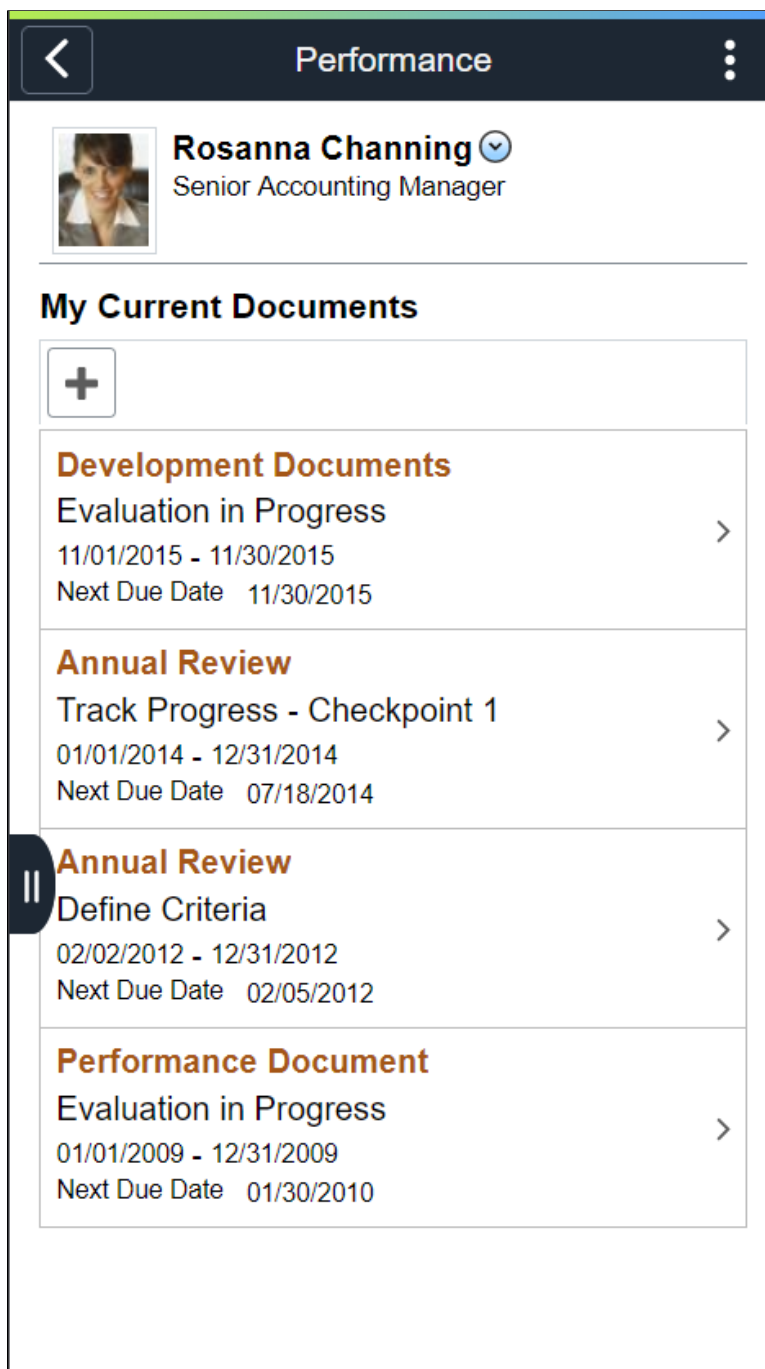
My Current Documents 4
My Historical Documents
Evaluations of Others 1
Historical Evaluations of Others

My Current Documents

Create Document

Document Type	Document Status	Period Begin / Period End	Next Due Date	
Development Documents	Evaluation in Progress	11/01/2015	11/30/2015	>
		11/30/2015		
Annual Review	Track Progress - Checkpoint 1	01/01/2014	07/18/2014	>
		12/31/2014		
Annual Review	Define Criteria	02/02/2012	02/05/2012	>
		12/31/2012		
Performance Document	Evaluation In Progress	01/01/2009	01/30/2010	>
		12/31/2009		

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

Select a document row to open the corresponding document for edits in the ePerformance WorkCenter. From the WorkCenter, you can select the **Performance** button on the page banner to return to the Performance page.

<i>Field or Control</i>	<i>Description</i>
Create Document	Select 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:

Select the **Create Document** button on the My Current Documents page.

This example illustrates the fields and controls on the Create Document page (Performance).

The screenshot shows the 'Create Document' page with a header bar containing 'Cancel' and 'Create' buttons. The main content area includes the following fields and controls:

- Period Begin Date:** A date input field with the value '01/01/2022' and a calendar icon.
- Period End Date:** A date input field with the value '12/31/2022' and a calendar icon.
- Document Type:** A dropdown menu with the selected value 'Performance Document'.
- Clone from Prior Document:** A toggle switch currently set to 'No'.
- Template:** A dropdown menu with the selected value 'Performance w/o Overall Rating'.
- Select a Manager:** A button located at the bottom right of the form.

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:

Select the **My Historical Documents** tab on the left panel of the Performance page.

This example illustrates the fields and controls on the My Historical Documents page.

My Historical Documents		
Document Type	Document Status	Period Begin / Period End
Annual Review	Completed	01/01/2021 12/31/2021 >
Annual Review	Completed	01/01/2020 12/31/2020 >
Annual Review	Completed	01/01/2019 12/31/2019 >

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

Select a document row to open the corresponding document for review in the ePerformance WorkCenter. From the WorkCenter, you can select 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:

Select the **Evaluations of Others** tab on the left panel of the Performance page.

This example illustrates the fields and controls on the Evaluations of Others page.

Evaluations of Others

Pending Evaluation Requests

☐ Name	Document Type	Due Date
☐ Cynthia Adams	Annual Review	01/01/2014

Current Evaluations

No data exists

Pending Evaluation Requests

The grid in this section lists the evaluation requests from others that are pending employee's acceptance.

<i>Field or Control</i>	<i>Description</i>
Accept	Select 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	Select 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 Installation - 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.

Select a row to open and edit the corresponding evaluation for another employee on the <role> Evaluation page. From the WorkCenter, you can select 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:

Select the **Historical Evaluations of Others** tab on the left panel of the Performance page.

This example illustrates the fields and controls on the Historical Evaluations of Others page.

Historical Evaluations of Others			
Name	Document Type	Document Status	Period Begin / Period End
Roberta Chancellor	Performance Document	Completed	01/01/2009 12/31/2009 >

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

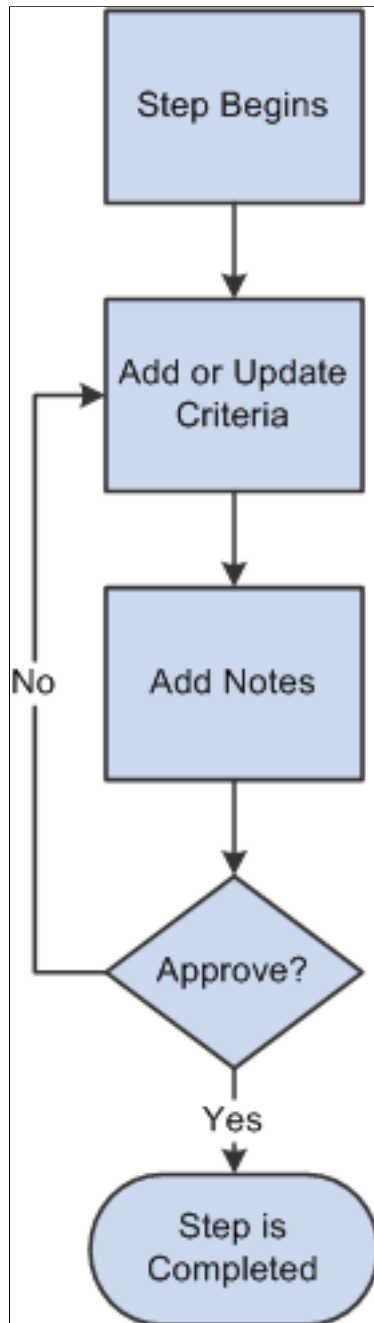
Select a row to view the corresponding evaluation that you completed for another employee on the <role> Evaluation page. From the WorkCenter, you can select the **Performance** button on the page banner to return to the Performance page.

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.

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



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

- Add items:
 - Add predefined (coded) items and sub-items from the content catalog.
 - Add free form items and sub-items.
 - Copy items from other documents that are created for the manager or the employee, or other documents that the manager owns.

- 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:

<i>If the item is</i>	<i>Editable Fields for Coded Items</i>	<i>Editable fields for Not Coded (Free From) Items</i>
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 sub-items or select predefined sub-items for items that are already on 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 document.

Participant Feedback

You can set up document templates for peer reviewers to enter feedback on sections, section items and sub-items at the Define Criteria step, and for managers to view participant feedback that has been completed.

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

Note: ePerformance integrates with Team Calendar to display performance document due dates. From the Team Calendar, you can view document due date reminders for your team members, and have the option to perform related actions, such as opening the document for update, or viewing other performance documents.

See “Using Fluid Manager Calendar View” (PeopleSoft Absence Management).

Video: [Image Highlights, PeopleSoft HCM Update Image 43: Accessing Performance Management from Team Calendar](#)

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*.

Reopening the Define Criteria Step

A completed Define Criteria step can be reopened for updates if necessary. It can be reopened if all these conditions are met:

- No nominations have been accepted.

This condition does not apply, if the **Allow participant feedback at anytime** option is enabled on the [Template Definition - Process Page](#).

- 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.

(For peer evaluations only) If the **Allow participant feedback at anytime** option is enabled on the [Template Definition - Process Page](#), the Define Criteria step can still be reopened if one or more peer evaluations have already started for the document. Existing peer reviews will not be deleted when a step is reopened.

- The last modified dates and times of the current step and the Define Criteria step are identical. The Define Criteria step cannot be reopened if information of the current step has been updated.

Folders of completed steps are collapsed on documents by default. When you expand the folder of a completed Define 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.

The approver (either manager or employee as set up in the template) of the Define Criteria step can reopen the step.

Related Links

[Understanding Document Templates](#)

[\(Classic\) 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 Installation - 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.

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 Rules** section on the Template Definition - Structure page.

(Classic) Modifying Evaluation Criteria

This topic discusses how to update document evaluation criteria in Classic Plus mode.

Note: A fluid version of ePerformance is now available to support employee performance reviews. For more information, see [Understanding Fluid ePerformance](#).

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.
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.

Page Name	Definition Name	Usage
<u>Select a Document Page</u>	EP_APPR_SEL_ADDITM	Select a document from which items can be copied to the current document.
<u>Copy <section item> from My Documents or Copy <section item> from My Team's Documents Page</u>	EP_APPR_EDIT9	Copy one or more items from the previously selected document to the current document.
<u>Add a <section item> Behavior Page (EP_APPR_EDIT6)</u>	EP_APPR_EDIT6	Select to add a free-form or a predefined sub-item to the evaluation document.
<u>Add a <section item> Behavior Page (EP_APPR_EDIT7)</u> (For finding predefined items)	EP_APPR_EDIT7	Search and add items that are predefined in the system.
<u>Add a <section item> Behavior or Edit <section item> Behavior Page</u> (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.

This example illustrates the fields and controls on the Define Criteria page (1 of 2).

Performance Process ⚙️

Steps and Tasks 🔍

Rosanna Channing
Annual Review
01/01/2019 - 12/31/2019 Overview

- Define Criteria
Due Date 03/15/2019 Update and Approve
- Checkpoint 1
Due Date 07/17/2019
- Finalize Criteria
Due Date 12/31/2019
- Nominate Participants
Due Date 12/31/2019
- Review Participant Evaluations
Due Date 01/31/2020
- Review Self Evaluation
Due Date 02/15/2020
- Complete Manager Evaluation
Due Date 02/28/2020

Annual Review Save Approve

Define Criteria - Update and Approve Print Notify Export

Rosanna Channing Actions

Job Title Senior Accounting Manager Manager Betty Locherty
Document Type Annual Review Period 01/01/2019 - 12/31/2019
Template Yearly Eval with Mid-Period Document ID 1275
Status In Progress Due Date 03/15/2019

- Review the performance criteria (goals and/or responsibilities) that the employee plans to accomplish during this the performance period.
- Make any necessary adjustments to the criteria and review your changes with the employee.
- Once the performance criteria is correct select the approve button to complete this step.

Goals **Competencies** **Overall Results**

Section 1 - Goals

Goals will be evaluated by: Employee, Manager

Expand Collapse Add Item

Develop Global Channel model

Description - Develop a consistent Global Channel model 📄 ✎ 🗑

- Due Date :
- Status:

Created By Betty Locherty 09/24/2019 12:42PM

Goals Summary

This example illustrates the fields and controls on the Define Criteria page (2 of 2).

Performance Process ⚙️

Steps and Tasks 🔍

Rosanna Channing
Annual Review
01/01/2019 - 12/31/2019 Overview

- Define Criteria
Due Date 03/15/2019 Update and Approve
- Checkpoint 1
Due Date 07/17/2019
- Finalize Criteria
Due Date 12/31/2019
- Nominate Participants
Due Date 12/31/2019
- Review Participant Evaluations
Due Date 01/31/2020
- Review Self Evaluation
Due Date 02/15/2020
- Complete Manager Evaluation
Due Date 02/28/2020

Annual Review Save Approve

Define Criteria - Update and Approve Print Notify Export

Goals **Competencies** **Overall Results**

Section 2 - Competencies

Competencies will be evaluated by: Employee, Manager, Peer

Expand Collapse Add Competency

Competency 1: Analytical thinking

Description - Anticipates obstacles. 📄 ✎ 🗑

- Breaks problems apart systematically
- Makes logical conclusions
- Sees consequences, implications.
- Sees causal relationships, inferences.
- Target Rating: 4

Behavior 1: Breaks problems into components ✎ 🗑 Participant Ratings

Behavior 2: Makes logical decisions ✎ 🗑 Participant Ratings

+ Add Behavior

Participant Feedback

Display Name	Role	Rating	Results
Netty Owyang	Peer	Exceeds Expectations	Rosanna has an analytical mind. She's able to break problems into manageable components and make logical decisions.

Created By Profile 09/24/2019 12:40PM

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.

Field or Control	Description
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 the Define Criteria step that you previously completed. This button displays after you have clicked the link to reopen the already approved Define Criteria step.
 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 <i>EP_EVAL</i>.
 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 <i>EP_DOC</i>.

Field or Control	Description
 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 [<Manager or Self-> Evaluation Page](#) for additional field descriptions that are not mentioned in this topic.

Field or Control	Description
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.

Field or Control	Description
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 on pages for both current and historical documents.

Field or Control	Description
Learning Name	Click this link to display the <learning name> Description page in the Enterprise Learning Management (ELM) database.

Field or Control	Description
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 <i>PeopleSoft HCM: Enterprise Learning Management</i>
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.

Field or Control	Description
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 Human Resources Plan Careers and Successions).

Section # - Overall Summary

Use this section to review any overall participant feedback that peer reviewers entered during the Define Criteria step. Participant feedback is accessible to managers only.

The system displays the Overall Summary section in the Define Criteria step only if participant feedback is available for that step.

<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.

Field or Control	Description
 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” (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.

Field or Control	Description
Modification History	Click this link to access the Modification History page (EP_ITEM_MOD_HISTORY), 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.
Participant Ratings	Click to view review any participant's evaluation rating for the corresponding sub-item (behavior), if the information is available.

Participant Feedback

This collapsible section lists the feedback ratings and comments that are provided by peer reviewers for the section or section item being viewed. It is applicable to managers *only*, and appears if *all* of these conditions are met:

1. The **Allow participant feedback at anytime** option is selected on the [Template Definition - Process Page](#).
2. The **Participant Feedback** option is selected in the Define Criteria Step - Role Rules section on the [Template Definition - Structure Page](#) for the corresponding section (for example, Goals, Competencies, and so on).
3. One or more participants have provided feedback for the section or section item being viewed.

Note: Participant feedback is not available for review in canceled documents.

Video: [Image Highlights, PeopleSoft HCM Update Image 33: Viewing of Participant Feedback in Multiple Steps](#)

Audit History

See [Understanding Document Audits](#).

Related Links

[Creating Document Templates](#)

[Template Definition - Content Page](#)

[\(Classic\) Working With Writing Tools](#)

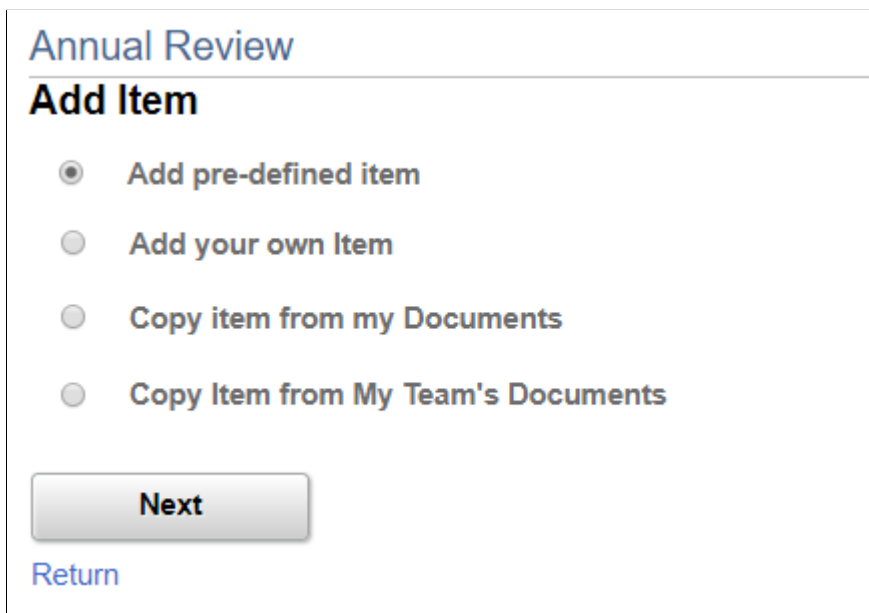
Add <section item> Page

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

This example illustrates the fields and controls on the Add <section item> page.



Annual Review

Add Item

- ☒ Add pre-defined item
- ☐ Add your own Item
- ☐ Copy item from my Documents
- ☐ Copy Item 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.

This example illustrates the fields and controls on the Add a Pre-Defined <section item> page.

Annual Review

Add a Pre-Defined Item

To search for items to add to the document select the search button. You can also enter search criteria to help refine your results.

Search Criteria

Title

Search
Clear

Search Results

1-1 of 1

	Goals
☐	Decrease Call Center Response Time by 2 minutes

Select All
Deselect All

Add

Return

Search Criteria

Field or Control	Description
<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 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.

This example illustrates the fields and controls on the Add Your Own <section item> page.

Annual Review

Add Your Own Item

*Title

Description

Font

Size

B

I

U

Status

Due Date

(example 12/31/2000)

Add

[Return](#)

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.

Align Goals & Objectives to Business Objective

Field or Control	Description
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.

Field or Control	Description
Aligns To Objectives	Select an objective from the referenced objective plan to which the new goal aligns.

This example illustrates the fields and controls on the Edit <section item> page.

Annual Review

Edit Item

Title
Decrease Call Center Response Time by 2 minutes

Description

Decrease call center response time during peak hours each day by 2 minutes.

Status
In Progress

Due Date

(example 12/31/2000)

Update

Return

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 <item> from Business Objectives** radio button and then click the **Next** button.

This example illustrates the fields and controls on the Copy from Business Objectives page.

Performance Document

Copy from Business Objectives

Below are the Business Objectives for your organization. You can copy any of these Objectives into the document by selecting the checkbox next to the goal and then the copy button or you can search for different objectives by selecting the link Use Different Objectives. To view more details about each objective, select the link on the objective name.

Business Objectives Criteria

Business Objectives [2009 Objectives for Corporate Legal](#) [Find Different Objectives](#)

Section ANY

Business Objectives

1-5 of 5

	Objectives	Section
☐	Provide Quality Legal Services	Customer Loyalty
☐	Increase Intellectual Property Filings	Profitability
☐	Provide Safe Work Environment	Employee Commitment
☐	Provide Competitive Salary and Benefits to Employees	Employee Commitment
☐	Provide Quality Educational Opportunities	Employee Commitment

Select All Deselect All

Copy Cancel

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 (if you are an employee) or copy item from my document (if you are a manager), and click the **Next** button.

This example illustrates the fields and controls on the Copy from Manager Document page.

Performance Document

Copy from Manager Document

Select the check box next to each goal you want to add. When you are finished, select the Copy button to return to the document where you can save your entry.

Manager Document

Name	Betty Locherty	Document Type	PERFORM
Section	Goals & Objectives	Content Type	OBJECTIVES
Begin Date	01/01/2009	End Date	12/31/2009

Manager Goals & Objectives

1-9 of 9

Employee Goals	
☐	Demonstrate Customer Respect and Loyalty
☐	Ensure Customer Satisfaction
☐	Maintain Cost Effective Services
☐	Provide Safe Work Environment
☐	Effectively Manage Corporate Expense
☐	Provide Competitive Salary and Benefits to Employees
☐	Provide Quality Educational Opportunities
☐	Provide Accurate and Timely Financial Reports
☐	Monitor and Control Corporate Spending

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

Copy

Cancel

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 (if you are an employee) or my team's documents (if you are a manager) and click the **Next** button.

This example illustrates the fields and controls on the Select a Document page.

Performance Document
Select a Document

Below is a list of documents you own. Select the document you want to copy items from.

▼ **Filter Criteria**

First Name

Last Name

Document Type

Document Status

Period Between -

Filter

Clear

Performance Documents

1-1 of 1

Select	Name	Document Type	Document Status	Period Begin	Period End
Select	Rosanna Channing	Annual Review	Track Progress - Checkpoint 1	01/01/2014	12/31/2014

[Return](#)

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 (EP_APPR_EDIT9) 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.

This example illustrates the fields and controls on the Copy <section item> from My Documents page.

Performance Document

Copy Competency from My Documents

Select the check box next to each competency you want to add. When you are finished, select the Copy button to return to the document where you can save your entry.

Copy from Document

Name	Rosanna Channing	Document Type	K0ANNUAL
Section	Competency Section	Content Type	COMPETENCY
Begin Date	01/01/2014	End Date	12/31/2014

Competencies to be copied

1-4 of 4

Competencies
☐ Action Oriented
☐ Functional / Technical Skills
☐ Establish Best Practices
☐ Focus on Customers

Select All Deselect All

Copy **Cancel**

This example illustrates the fields and controls on the Copy <section item> from My Team's Documents page.

Performance Document

Copy Item from My Team's Documents

Select the check box next to each item you want to add. When you are finished, select the Copy button to return to the document where you can save your entry.

Copy from Document

Name	Cynthia Adams	Document Type	K0ANNUAL
Section	Goals	Content Type	GOAL
Begin Date	01/01/2014	End Date	12/31/2014

Goals to be copied

1-4 of 4

Goals	Status
☐ Manager Corporate Cash Flow	In Progress
☐ Monitor Corporate Spending Monthly	In Progress
☐ Manage Accounting Projects	In Progress
☐ Follow Corporate Ethics and Standards	In Progress

Select All Deselect All

Copy **Cancel**

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.

<i>Field or Control</i>	<i>Description</i>
<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 sub-item to the evaluation document.

Navigation:

Click the **Add Behavior** link in a section item on the evaluation document.

This example illustrates the fields and controls on the Add a <section item> Behavior page.

Annual Review

Add a Competency Behavior

You have chosen to add a new behavior.

You can either enter a new behavior on your own or choose a behavior already defined in the system. When you are finished, select the Next button to continue.

☒ Add pre-defined behavior
☐ Add your own behavior

Next

[Return](#)

Use this page to add free-form or pre-defined sub-items (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 sub-items that are predefined in the system.

Navigation:

Select to add a predefined sub-item on the Add <section item> Behavior page and click the **Next** button.

This example illustrates the fields and controls on the Add a <section item> Behavior page (EP_APPR_EDIT7).

Annual Review

Add a Competency Behavior

Using the Search Criteria and the Search button, you may search for titles of competencies to add to your evaluation. Select the check box next to each competency you want to add. When you are finished, select the Save Selected Competencies button to save your entry.

Search Criteria

Behavior

Search **Clear**

[Return](#)

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 sub-item or modify an existing free-form or a predefined sub-item in the evaluation document.

Navigation:

- Select to add your own sub-item (free-form) on the Add <section item> Behavior page and click the **Next** button.
- Click the **Edit Details** icon of the sub-item that you want to update on the document.

This example illustrates the fields and controls on the Add a <section item> Behavior page (EP_APPR_EDIT8).

This example illustrates the fields and controls on the Edit <section item> Behavior page.

Use these pages to add free-form sub-items to the evaluation document, or modify existing ones. Click the Update button to save the changes.

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 completing their final 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.

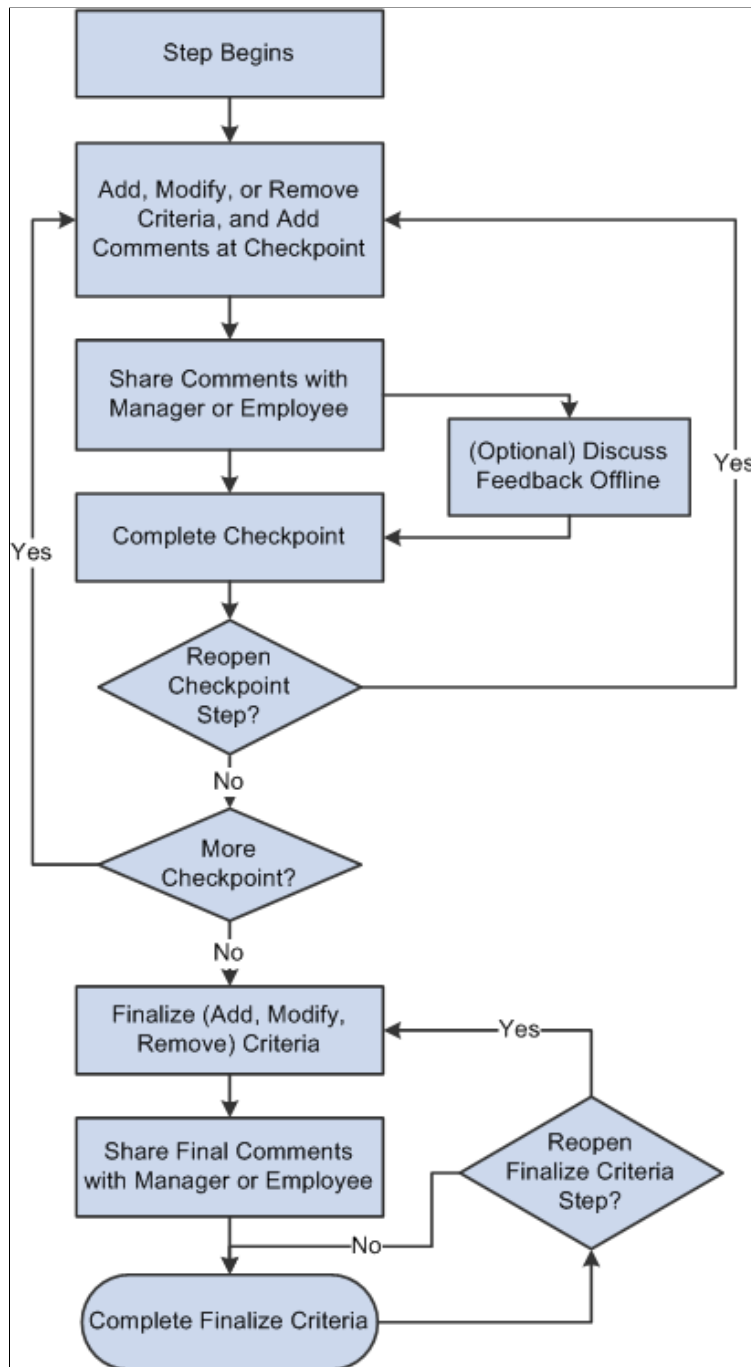
Video: [New ePerformance Features in HCM 9.2](#)

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:

Steps involved in the Track Progress process flow



During the Checkpoint step, the employee updates the criteria in the document (if configured), 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 manager 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.

Participant Feedback

You can set up document templates for peer reviewers to enter feedback on sections, section items and sub-items at the Checkpoint and Finalize Criteria steps, and for managers to view participant feedback that has been completed.

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 all these conditions are met:

- No nominations have been accepted.

This condition does not apply, if the **Allow participant feedback at anytime** option is enabled on the [Template Definition - Process Page](#).

- 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.

(*For peer evaluations only*) If the **Allow participant feedback at anytime** option is enabled on the [Template Definition - Process Page](#), the Checkpoint or Finalize Criteria step can still be reopened if one or more peer evaluations have already started for the document. Existing peer reviews will not be deleted when a step is reopened.

- 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](#).

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).

(Classic) Tracking Mid-Period Progress

This topic discusses how to track mid-period progress in documents in Classic Plus mode.

Note: A fluid version of ePerformance is now available to support employee performance reviews. For more information, see [Understanding Fluid ePerformance](#).

Pages Used to Track Mid-Period Progress

Page Name	Definition Name	Usage
Checkpoint <#> 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.

Common Elements Used in This Topic

Participant Feedback

This collapsible section lists the feedback ratings and comments that are provided by peer reviewers for the section or section item being viewed. It is applicable to managers *only*, and appears if *all* of these conditions are met:

1. The **Allow participant feedback at anytime** option is selected on the [Template Definition - Process Page](#).
2. The **Participant Feedback** option is selected in the Track Progress Step - Role Rules section on the [Template Definition - Structure Page](#) for the corresponding section (for example, Goals, Competencies, and so on).
3. One or more participants have provided feedback for the section or section item being viewed.

Note: Participant feedback is available for review in canceled documents.

Video: [Image Highlights, PeopleSoft HCM Update Image 33: Viewing of Participant Feedback in Multiple Steps](#)

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.

This example illustrates the fields and controls on the Checkpoint <#> page (1 of 2).

Performance Process

Steps and Tasks

Rosanna Channing

Annual Review

01/01/2019 - 12/31/2019

Overview

Define Criteria

Due Date 03/15/2019

Checkpoint 1

Due Date 07/17/2019

Update and Share

Review with Employee

Finalize Criteria

Due Date 12/31/2019

Nominate Participants

Due Date 12/31/2019

Review Participant Evaluations

Due Date 01/31/2020

Review Self Evaluation

Due Date 02/15/2020

Complete Manager Evaluation

Due Date 02/28/2020

Annual Review

SaveSkip CheckpointStop SharingComplete Checkpoint

Checkpoint 1 - Review with Employee

PrintNotifyExport

GoalsCompetenciesOverall Results

Section 2 - Competencies

Competencies will be evaluated by: Employee, Manager, Peer

ExpandCollapseAdd Competency

Competency 1: Analytical thinking

Competency 2: Conceptual thinking

Description: - Recognizes key actions, underlying problems

- Makes connections and patterns.

- Recognizes patterns, uses concepts to diagnose situations

- Simplifies, clarifies difficult material.

Target Rating: 4

Add Behavior

Manager Comments

Employee Comments

This example illustrates the fields and controls on the Checkpoint <#> page (2 of 2).

Performance Process

Steps and Tasks

Rosanna Channing

Annual Review

01/01/2019 - 12/31/2019

Overview

Define Criteria

Due Date 03/15/2019

Checkpoint 1

Due Date 07/17/2019

Update and Share

Review with Employee

Finalize Criteria

Due Date 12/31/2019

Nominate Participants

Due Date 12/31/2019

Review Participant Evaluations

Due Date 01/31/2020

Review Self Evaluation

Due Date 02/15/2020

Complete Manager Evaluation

Due Date 02/28/2020

Annual Review

SaveSkip CheckpointStop SharingComplete Checkpoint

Checkpoint 1 - Review with Employee

PrintNotifyExport

Participant Feedback

Display Name	Role	Rating	Results
Netty Owyang	Peer	Meets Expectations	

Created By Profile 09/24/2019 12:40PM

Competency Section Summary

Manager Comments

Employee Comments

Participant Feedback

Display Name	Role	Rating	Results
Netty Owyang	Peer	Meets Expectations	Rosanna did well in all competency areas.

If there are more than one checkpoint, they are named *Checkpoint 1*, *Checkpoint 2*, and so on.

Field or Control	Description
Skip Checkpoint	Click to skip this checkpoint and move to the next available step in the review process.

Field or Control	Description
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, <i>Review with Employee</i> or <i>Review Manager Comments</i> (or <i>Review with Manager</i> in some cases), depending on the role of the user who is 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.

Field or Control	Description
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 Installation - 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. The **Reopen** link is available if the next step has not started or saved. 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.

This example illustrates the fields and controls on the Finalize Criteria page.

Performance Process Settings «

Steps and Tasks ⌵ ⌵

- Define Criteria Due Date 03/15/2019
- Checkpoint 1 Due Date 07/17/2019
- Finalize Criteria Due Date 12/31/2019**
 - Update and Complete
- Nominate Participants Due Date 12/31/2019
- Review Participant Evaluations Due Date 01/31/2020
- Review Self Evaluation Due Date 02/15/2020
- Complete Manager Evaluation Due Date 02/28/2020

Annual Review Save Share with Employee Complete

Finalize Criteria - Update and Complete Print Notify Export

Rosanna Channing Actions

Job Title Senior Accounting Manager Manager Betty Locherty
 Document Type Annual Review Period 01/01/2019 - 12/31/2019
 Template Yearly Eval with Mid-Period Document ID 1275
 Status In Progress Due Date 12/31/2019

Your comments are currently not shared with your employee
 Just prior to starting the final evaluation update the performance criteria if necessary and select the Complete button if applicable.

Goals Competencies Overall Results

Section 3 - Overall Summary

Overall Summary will be evaluated by: Manager

Overall Summary Section

Manager Comments Font Size B I U Text Color Background Color Link Image

Rosanna is on track.

Participant Feedback

Display Name	Role	Rating	Results
Netty Owyang	Peer	Meets Expectations	Rosanna is great addition to the team.

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.

Field or Control	Description
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. The

Reopen link is available if the next step to complete evaluation has not started or saved. Then, click the **Reopen** button on the document and confirm the action again.

Related Links

[Define Criteria Page](#)

[Add <section item> Page](#)

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:

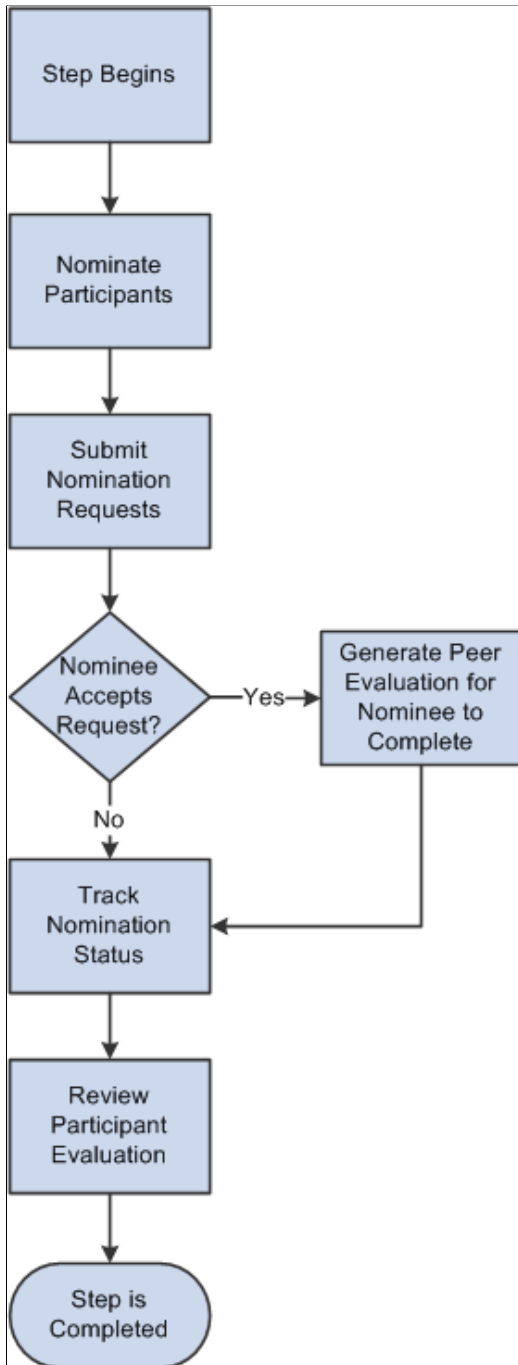
- Multi-participant process.
- Nominations.
- Multi-participant evaluations.
- Notifications.

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.

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 **Added By** check box is selected for their role, only the role that is selected in the **Submitted By** field can submit the nominations.

Note: If the option to allow participant feedback at anytime is enabled on the Template Definition - Process Page, nominations can be added and submitted as soon as the first step of the evaluation cycle (for example, the Define Criteria step if enabled) starts. If this option is not enabled, nominations can be submitted after the substep to update manager evaluation is in progress.

- Track the status of nominations and cancel nominations.

A tracker might cancel a nomination if it is pending for too long. The tracker provides the ability to resubmit canceled nominations, which happen when managers reopen completed documents.

- 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

As mentioned previously, the **Allow participant feedback at anytime** option determines when participant nominations can be submitted. In addition, the system does not submit nominations until the minimum number of participants are added. 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

[\(Classic\) Managing Evaluation Requests](#)

[\(Classic\) Monitoring and Viewing Participant Evaluations](#)

[Understanding Evaluation Data Entry](#)

Prerequisites

Before submitting nominations for 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. Start the evaluation (document status is set to *Evaluation in Progress*) if the **Allow participant feedback at anytime** option is disabled.

Related Links

[Creating Document Templates](#)

(Classic) Managing Nominations

This topic discusses how to nominate participants in documents in Classic Plus mode.

Note: A fluid version of ePerformance is now available to support employee performance reviews. For more information, see [Understanding Fluid ePerformance](#).

Pages Used to Nominate Participants

<i>Page Name</i>	<i>Definition Name</i>	<i>Usage</i>
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.

Page Name	Definition Name	Usage
“(Classic) Person Search Page” (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.

This example illustrates the fields and controls on the Nominate Participants - Add Nominees page.

Performance Process ⚙️ ⏮️ ⋮

Steps and Tasks 🔄 ⋮

Rosanna Channing
Annual Review
01/01/2019 - 12/31/2019

- Define Criteria
Due Date 03/15/2019
- Checkpoint 1
Due Date 07/17/2019
- Finalize Criteria
Due Date 12/31/2019
- Nominate Participants
Due Date 12/31/2019
 - [Add Nominees](#)
 - [Track Nominations](#)
- Review Participant Evaluations
Due Date 01/31/2020
- Review Self Evaluation
Due Date 02/15/2020
- Complete Manager Evaluation
Due Date 02/28/2020

Annual Review Save

Nominate Participants - Add Nominees 📧 Notify

Rosanna Channing
[Actions](#)



Job Title Senior Accounting Manager Manager Betty Locherty

Document Type Annual Review Period 01/01/2019 - 12/31/2019

Template Annual with Mid-Period Eval Document ID 1256

Status In Progress Due Date 12/31/2019

◆ **Participant Role: Peer** Minimum Required: 0 Maximum Available: 5

Nominations
Currently there are no nominees in your nomination list.

+ [Add Peer](#)

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.

Field or Control	Description
Save	Click this button to save the participant list.

Field or Control	Description
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. The number of nominations to be submitted must be within the range of the minimum required and maximum available numbers. See Pending Evaluation Requests Page.

Nominations

This section lists the nominees who are added by the user but not yet submitted.

Field or Control	Description
 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.

This example illustrates the fields and controls on the Nominate Participants - Track Nominations page.

Performance Process

Steps and Tasks

Rosanna Channing
Annual Review
01/01/2019 - 12/31/2019

- Define Criteria
Due Date 03/15/2019
- Checkpoint 1
Due Date 07/17/2019
- Finalize Criteria
Due Date 12/31/2019
- Nominate Participants
Due Date 12/31/2019
- Review Participant Evaluations
Due Date 01/31/2020
- Review Self Evaluation
Due Date 02/15/2020
- Complete Manager Evaluation
Due Date 02/28/2020

Annual Review

Nominate Participants - Track Nominations

Rosanna Channing
Actions

Job Title: Senior Accounting Manager
Manager: Betty Locherty
Document Type: Annual Review
Period: 01/01/2019 - 12/31/2019
Template: Annual with Mid-Period Eval
Document ID: 1256
Status: In Progress
Due Date: 12/31/2019

Participant Role: Peer
Minimum Required: 0 Maximum Available: 4

Nominations

Nominee	Status	Cancel
Netty Owyang	Pending	Cancel

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*.

Field or Control	Description
Cancel	Click this link to cancel a nomination request. The nomination status is then changed to <i>canceled</i> .

Field or Control	Description
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.

(Classic) Managing Evaluation Requests

This topic discusses how to manage evaluation requests in Classic Plus mode.

Note: A fluid version of ePerformance is now available to support employee performance reviews. For more information, see [Understanding Fluid ePerformance](#).

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.
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 > Performance Evaluation Request > Pending Evaluation Requests

Self-Service > Performance Management > Other's Development Documents > Development Evaluation Request > Pending Evaluation Requests

This example illustrates the fields and controls on the Pending Evaluation Requests page.

Pending Evaluation Requests

Pending Evaluation Requests

	Name	Document Type	Due Date
☐	Jill Chancelor	Performance Document	01/30/2010
☐	Rosanna Channing	Annual Review	01/31/2020

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

Field or Control	Description
Accept	Click this button to accept the evaluation requests that you select. This action changes the nomination status to <i>Accepted</i>, 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 <i>Declined</i> 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 > Others Performance Evaluations > My Current Evaluations for Others**
- **Self-Service > Performance Management > Other's Development Documents > Others Development Evaluations > My Current Evaluations for Others**

This example illustrates the fields and controls on the My Current Evaluations for Others page.

My Current Evaluations for Others				
✔ You have successfully accepted the selected evaluations.				
Current Evaluations for Others				
Name	Document Type	Status	Period Begin	Period End
Rosanna Channing	Annual Review	Not Started	01/01/2019	12/31/2019

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.

(Classic) Monitoring and Viewing Participant Evaluations

This topic discusses how to monitor participant evaluation status and view the content of participant evaluations in Classic Plus mode.

Note: A fluid version of ePerformance is now available to support employee performance reviews. For more information, see [Understanding Fluid ePerformance](#).

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.

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

Participant Evaluation

Help

Participant Evaluations

Participant	Role	Status	Due Date
Netty Owyang	Peer	Not Started	01/31/2020

Return

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.

Field or Control	Description
Participant	Click to view the evaluation entered by the participant on the Peer Evaluation page.

Entering Comments and Ratings on Evaluations

Understanding Evaluation Data Entry

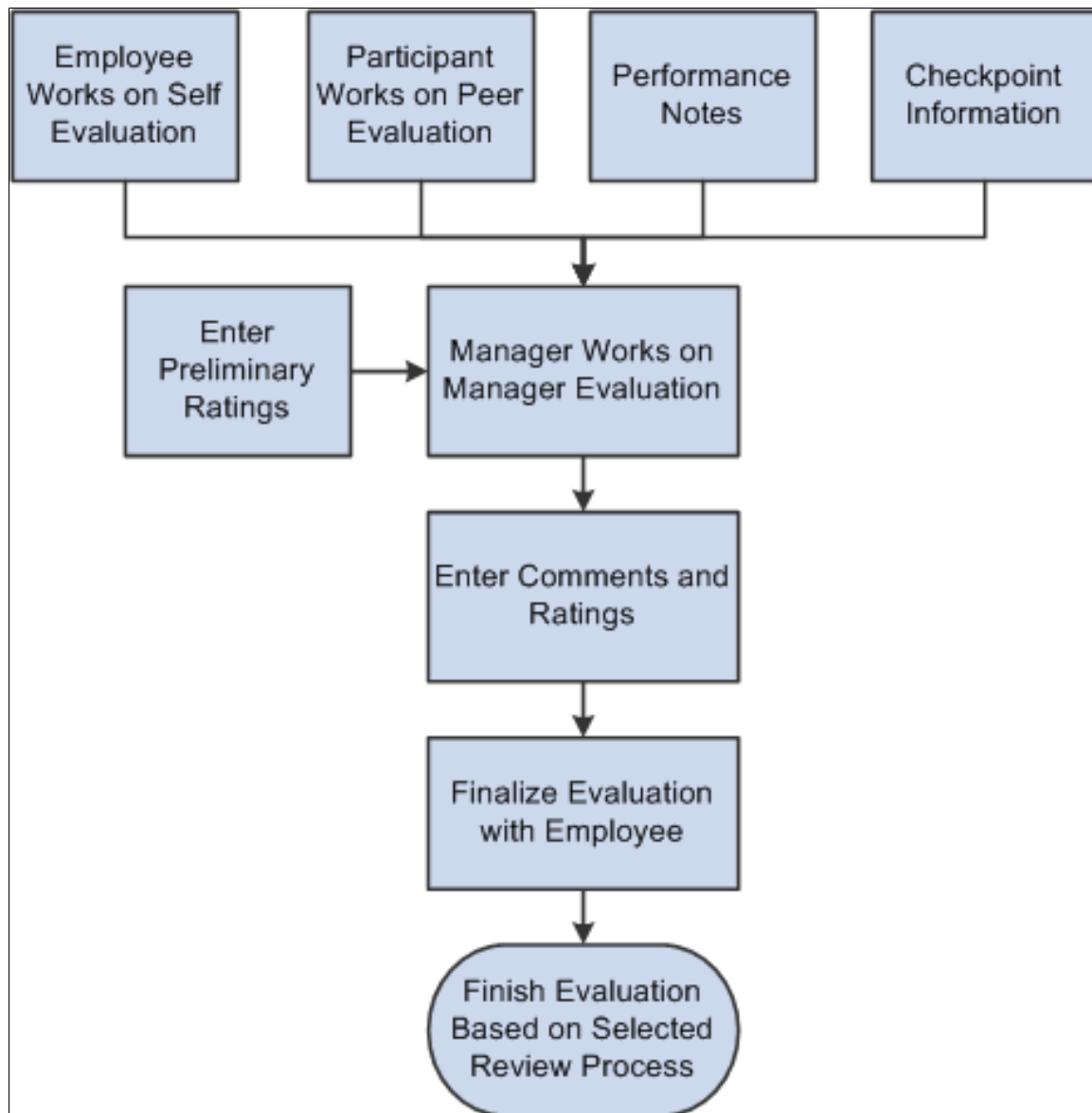
This topic discusses these topics:

- Performance and development process.
- Preliminary ratings.
- Performance notes.
- Ratings and comments.
- Advisor tools.
- Finalization activities.
- Due date setup.
- 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.

This diagram shows the flow of the evaluation data entry process, including optional components that can be implemented to provide extra functionality.



When the evaluation is 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 shown in:

- The Ratings Distribution Summary report on the [View Rating Summary Page](#), which enables HR administrators to compare preliminary ratings with desired and actual rating distributions for groups.
- The [Team Rating Insights Dashboard](#), which enables high-level managers to view preliminary ratings and review ratings for their organizations or teams and compare review ratings against preliminary rating and desired rating distributions.

See [Recording Preliminary Ratings](#).

Performance Notes

Managers and employees can record notes about an employee's performance and accomplishments in two ways:

- Within documents:
 - (Classic ePerformance) In the Define Criteria step, the Checkpoint step, and the Finalize Criteria step.
Notes can be added to items.
 - (Fluid ePerformance) In any document step.
Notes can be added to documents in general, sections, and items.

Performance notes can be used as comments to an evaluation at the section or item level using the Writing Tools feature.

- At any time, by navigating to the Performance Notes page.

Employees can create records of events, activities, and accomplishments that they can later use to complete their performance evaluations. Similarly, managers can record details of an employee's performance for use when they complete the employee's evaluation. These notes are dated, and are available only to the author of a note. In other words, the manager cannot see notes that the employee enters and vice versa.

Note: There is not a separate page for development notes. The Performance Notes page is used to record any comment. These notes are available for inclusion in either performance or development documents.

See [\(Fluid\) Working With Performance Notes](#) and [\(Classic\) Entering Performance Notes](#).

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 [\(Classic\) 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 [\(Classic\) 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 [Understanding Review and Approval Processes](#).

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

Notifications

The administrator can set the system to send out email notifications when these events occur while evaluations are in progress, for example:

- 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.

See [ePerformance Installation - ePerformance Page](#).

Related Links

[Creating Document Templates](#)

[Understanding Evaluation Criteria Modification](#)

Recording Preliminary Ratings

This topic discusses how to assign preliminary ratings for team documents as managers.

Page Used to Record Preliminary Ratings

<i>Page Name</i>	<i>Definition Name</i>	<i>Usage</i>
Enter Preliminary Ratings Page	EP_MSSADM_CONF_FL	Assign preliminary ratings to team documents as managers.

Understanding 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 shown in:

- The Ratings Distribution Summary report on the [View Rating Summary Page](#), which enables HR administrators to compare preliminary ratings with desired and actual rating distributions for groups.
- The [Team Rating Insights Dashboard](#), which enables high-level managers to view preliminary ratings and review ratings for their organizations or teams and compare review ratings against preliminary ratings and desired rating distributions.

Managers can see employee's preliminary ratings on documents.

Employees cannot see their own preliminary ratings on self-evaluations.

To enable the entry of preliminary ratings, select the **Preliminary Rating** check box for the **Overall Summary** section on the document template.

Enter Preliminary Ratings Page

Use the Enter Preliminary Ratings page (EP_MSSADM_CONF_FL) to assign preliminary ratings to team documents as managers.

Navigation:

- (Fluid ePerformance tile navigation) [Team Performance Tile](#), then [Administrative Tasks Tile](#). Select the **Enter Preliminary Rating** tab on the left panel of the Administrative Tasks page that appears.
- **Manager Self Service > Performance Management > Performance Documents > Administrative Tasks > Enter Preliminary Ratings > Enter Preliminary Ratings**

This example illustrates the fields and controls on the Enter Preliminary Ratings page.

Enter Preliminary Ratings

Listed are the in-progress documents for which you are the manager.
Enter the new preliminary ratings, then select the Save button.

Save

9 rows

Name / Job Title	Document Type	Document Status	Period Begin / Period End	Preliminary Rating
 Tina Palisco Manager-Accounting	Annual Review	Define Criteria	01/01/2023 12/31/2023	 Company Maker Numeric Rating 5.00
 Susan Hoinck Senior Financial Analyst	Annual Review	Define Criteria	01/01/2023 12/31/2023	 Meets Expectations Numeric Rating 3.00
 Cynthia Adams Corporate Controller	Annual Review	Define Criteria	01/01/2023 12/31/2023	 Company Maker Numeric Rating 5.00

Note: Users must be members of the *Fluid Dashboard - MSS ePerf* and *ePerformance Manager Fluid* roles to access the Enter Preliminary Ratings page in Fluid.

Field or Control	Description
Preliminary Rating	Enter a preliminary rating. The rating model used for specifying a preliminary rating comes from the Overall Summary section of the template for the corresponding document. Logged-in managers can enter preliminary performance ratings for their team documents that are currently in progress.

Related Links

“Defining Rating Models” (PeopleSoft Human Resources Manage Profiles)

(Classic) Entering Performance Notes

This topic discusses how to enter performance notes.

Pages Used to Enter Performance Notes

Note: A fluid version of Performance Notes is now available for users to create and manage notes. For more information, see [\(Fluid\) Working With 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. When you delete an item (from a document) 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.
“(Classic) Person Search Page” (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” (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**

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

Performance Notes

Instructions

Enter the Employee ID of the subject employee in the search criteria, then select the **Search** button. (This list can be filtered further by entering a "Starting Date").

New notes can be added and existing notes can be edited. To add a new note, select on the **Add New Note** button. To edit or access the details of an existing note, select on the note's subject.

Selection Criteria

*Employee ID Betty Locherty

Notes From Through

Search **Add a New Note**

Existing Performance Notes for this Employee [Personalize](#) | [Find](#) |

Employee ID	Select	Subject	Created
KU0007	☒	FY12 Performance	08/06/2012 3:42PM

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

Delete **Transfer**

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.

Field or Control	Description
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.

Field or Control	Description
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.

This example illustrates the fields and controls on the Performance Notes - Add/Update Notes page.

 Performance Notes - Add/Update Notes

Instructions

Selected Performance Note

Applications

Employee ID

KU0007

Betty Locherty

Created

08/06/2012 3:42PM

Creator

Betty Locherty

Last Update

08/06/2012 3:57PM

by

PS

Subject

FY12 Performance

Note Text

Exceeded Expectations. Streamlined FPRC processes. Improved over 35% efficiency in Q1.

Save

< Previous

Next >

[Return to Performance Note Selection](#)

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**.

Note: (Fluid ePerformance only) Add or edit performance notes for items on the [My Notes Page](#). Notes added from the Performance Notes - Add/Update Notes page are not applicable to documents in Fluid.

Field or Control	Description
Subject	Enter the subject of the note.
Note Text	Enter the text of the note.

(Classic) Updating Evaluations

This topic lists prerequisites and discusses how to update evaluation details in Classic Plus mode.

Note: A fluid version of ePerformance is now available to support employee performance reviews. For more information, see [Understanding Fluid ePerformance](#).

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

<i>Page Name</i>	<i>Definition Name</i>	<i>Usage</i>
<u><Manager or Self-> Evaluation Page</u>	EP_APPR_MAIN1	Enter and maintain evaluation data for an employee based on user role.
<u>Peer Evaluation Page</u>	EP_APPR_MAIN1	Provide evaluation feedback to another employee.
<u>Add <section item> Page</u>	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.
<u>Add a Pre-Defined <section item> Page</u>	EP_APPR_EDIT4	Add a predefined item to the section.
<u>Add Your Own <section item> or Edit <section item> Page or Edit <section item> Page</u>	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.
<u>Copy from Business Objectives Page</u>	EP_APPR_EDIT9	Copy goals from established business objectives into a performance or development document.
<u>Copy from Manager Document Page</u>	EP_APPR_EDIT9	Copy goals, responsibilities, competencies and other items from the manager's document into a performance or development document.
<u>Select a Document Page</u>	EP_APPR_SEL_ADDITM	Select a document from which items can be copied to the current document.
<u>Copy <section item> from My Documents or Copy <section item> from My Team's Documents Page</u>	EP_APPR_EDIT9	Copy one or more items from the previously selected document to the current document.
<u>Add a <section item> Behavior Page (EP_APPR_EDIT6)</u>	EP_APPR_EDIT6	Select a behavior to add to the section item or enter a free-form behavior.
<u>Add a <section item> Behavior or Edit <section item> Behavior Page</u>	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 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.

This example illustrates the fields and controls on the Manager Evaluation page (1 of 4).

Performance Process ⚙ «

Steps and Tasks ⌵

Rosanna Channing
Annual Review
01/01/2019 - 12/31/2019 Overview

- Define Criteria
Due Date 03/15/2019
- Checkpoint 1
Due Date 07/17/2019
- Finalize Criteria
Due Date 12/31/2019
- Nominate Participants
Due Date 12/31/2019
- Review Participant Evaluations
Due Date 01/31/2020
- Review Self Evaluation
Due Date 02/15/2020
- Complete Manager Evaluation
Due Date 02/28/2020
 - Update and Share

Request Acknowledgement
Pending Acknowledgement
Submit for Approval
Pending Approval

Annual Review Save Share with Employee

Manager Evaluation - Update and Share Print Notify Export

Rosanna Channing

Job Title Senior Accounting Manager Manager Betty Locherty
Document Type Annual Review Period 01/01/2019 - 12/31/2019
Template Annual with Mid-Period Eval Document ID 1261
Status Evaluation in Progress Due Date 02/28/2020

Enter ratings and comments for each section in this evaluation, if applicable. At any point in time you can save this evaluation by selecting the Save button.

✓ Check Language ⌵ Calculate All Ratings 📊 View Graphical Rating ⛔ Cancel Evaluation

Goals **Competencies** **Overall Results** **Employee Feedback**

Section 2 - Competencies

Enter ratings and comments for each competency and behavior listed below, if applicable.

⌵ Expand ⌶ Collapse ➕ Add Competency

Competency 1: Analytical thinking

Description - Anticipates obstacles.

- Breaks problems apart systematically
- Makes logical conclusions
- Sees consequences, implications.
- Sees causal relationships, inferences.
- Target Rating: 4-Very Good

This example illustrates the fields and controls on the Manager Evaluation page (2 of 4).

Behavior

+ Add Behavior

Behavior 1: Breaks problems into logical units 🗑

Manager Rating 5-Expert 5.00 Avg Rating 4-Very Good 4.00

Manager Comments

Writing Tools

Rosanna is a great team leader.

Employee Rating 4-Very Good

Employee Comments

can break problems apart systematically and make logical conclusions.

Participant Feedback

Participant	Role	Rating	Comments
Netty Owyang	Peer	4-Very Good	Rosanna is an excellent manager

Created By Profile 04/16/2019 1:59PM

This example illustrates the fields and controls on the Manager Evaluation page (3 of 4).

Competency 2: Conceptual thinking

Description : - Recognizes key actions, underlying problems

- Makes connections and patterns.
- Recognizes patterns, uses concepts to diagnose situations
- Simplifies, clarifies difficult material.
- Target Rating: 4-Very Good

Behavior

+ Add Behavior

Manager Rating: 4-Very Good 4.00 Avg Rating: 4-Very Good 4.00

Manager Comments

Writing Tools

Employee Rating: 3-Good

Employee Comments: I can break problems apart systematically and make logical conclusions. I'm able to recognize key actions and underlying problems in projects.

This example illustrates the fields and controls on the Manager Evaluation page (4 of 4).

Participant Feedback

Participant	Role	Rating	Comments
Netty Owyang	Peer	5-Expert	Rosanna is a visionary.

Created By: Profile 04/16/2019 1:59PM

Competencies Summary

Manager Comments

Writing Tools

Employee Comments: I'm able to recognize key actions and underlying problems in projects.

Attachments

No Attachments have been added to this document

+ Add Attachment

Audit History

This example illustrates the fields and controls on the Self-Evaluation page (1 of 2).

Performance Process

Steps and Tasks

- Define Criteria (Due Date: 03/15/2019)
- Checkpoint 1 (Due Date: 07/17/2019)
- Finalize Criteria (Due Date: 12/31/2019)
- Nominate Participants (Due Date: 12/31/2019)
- Complete Self Evaluation (Due Date: 02/15/2020)
 - Update and Complete
- Review Manager Evaluation (Due Date: 02/28/2020)

Annual Review

Self-Evaluation - Update and Complete

Rosanna Channing

Job Title: Senior Accounting Manager
 Document Type: Annual Review
 Template: Annual with Mid-Period Eval
 Status: Evaluation in Progress

Manager: Betty Locherty
 Period: 01/01/2019 - 12/31/2019
 Document ID: 1256
 Due Date: 02/15/2020

Enter your ratings and comments for each applicable section and save. When you have finished updating your evaluation select the complete button to save your changes and send this document to your manager for review.

[Calculate All Ratings](#)

Goals | **Competencies** | Overall Results

Section 2 - Competencies

Enter ratings and comments for each competency and behavior listed below, if applicable.

[Expand](#) | [Collapse](#) | [Add Competency](#)

Competency 1: Analytical thinking

Description : - Anticipates obstacles.
 - Breaks problems apart systematically
 - Makes logical conclusions
 - Sees consequences, implications.
 - Sees causal relationships, inferences.
 • Target Rating: 4-Very Good

Behavior

[+ Add Behavior](#)

This example illustrates the fields and controls on the Self-Evaluation page (2 of 2).

Checkpoint 1 (Due Date: 07/17/2019)

Finalize Criteria (Due Date: 12/31/2019)

Nominate Participants (Due Date: 12/31/2019)

Complete Self Evaluation (Due Date: 02/15/2020)

- Update and Complete

Review Manager Evaluation (Due Date: 02/28/2020)

Employee Rating: 3-Good (3.00)

Employee Comments

Writing Tools

I'm always ready to handle problems. I don't let difficulties simmer and quickly assume ownership of even the most challenging problems.

Created By: Profile
 Last Modified By: Rosanna Channing

04/15/2019 3:52PM
 04/15/2019 8:47PM

Competency 2: Action Oriented

Attachments

No Attachments have been added to this document

[+ Add Attachment](#)

Audit History

Created By: Betty Locherty
 Last Modified By: Rosanna Channing

04/15/2019 3:52:26PM
 04/15/2019 8:47:03PM

Video: [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 sub-items 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” (Application Fundamentals).

Field or Control	Description
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 <i>Evaluation in Progress</i>.
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 editing. 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

Field or Control	Description
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 <i>Acknowledged</i>. 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.

Field or Control	Description
 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](#).

Field or Control	Description
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.
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 phrases that are more acceptable from an organization's perspective.
Calculate All Ratings	Click to calculate the rating for each item (if sub-items exist), section summary, and overall summary that appears on the document. Ratings are not calculated for items, sections, or summaries that are overridden. This icon appears if the Calculate Ratings check box is selected on the Template Definition - Process page.

Field or Control	Description
 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 <i>Evaluation In Progress</i> to a status of <i>Canceled</i>. If the template was set up 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 <i>Evaluation In Progress</i>. This button appears for managers and administrators when the evaluation has passed the <i>Evaluation in Progress</i> status but hasn't been completed. Also, a document cannot be reopened if it has been submitted for approval.

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.

Field or Control	Description
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.

Field or Control	Description
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 <i>Employee</i> or <i>Manager</i> 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 <i>Basic</i>, <i>Intermediate</i>, and <i>Advanced</i> as its values. When an item from the Content Catalog is added, this field displays the level of difficulty associated with that item and you cannot edit the values. If the item is manually added, you can select the level of difficulty unless the item is marked mandatory on the Template Definition - Content page.

Field or Control	Description
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. <i>Yes</i> or <i>No</i> displays as the content for the Critical label if it is defined on the Template Definition - Content page.
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, and • The document is in the <i>Define Criteria</i>, <i>Checkpoint</i>, or <i>Finalize Criteria</i> step, during which the private setting is used. The Private label is not available for display in the <i>Evaluation</i> step. When an item is set as private in a document, it becomes unavailable for selection to other managers and employees who use the copy feature to add items to their documents from another document that has the private item. Note: The Private option does not affect the visibility of an item on a shared document between its manager and employee.

Field or Control	Description
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 (sub-item, 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 <i>Radio Buttons</i> to display ratings as radio bullets or you can select <i>Drop-Down Box</i> to display ratings in a drop-down list.
 Calculate Ratings	Click to calculate the corresponding rating. This icon appears if the Calculate Ratings option is selected on the <u>Template Definition - Process Page</u>. It is available next to rating fields in the <content item> Summary group box and Overall Summary section, and in some cases for items that have sub-items.
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 sub-item 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.

Field or Control	Description
Add Behavior	Click to add a new behavior. The Add Behavior link displays if sub-items are enabled on the Template Definition - Structure page.
Participant Ratings	Click to view review any participant's evaluation rating for the corresponding sub-item (behavior), 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.

Field or Control	Description
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 Installation - 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 or Track Progress 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).

Field or Control	Description
 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.

Participant Feedback

This collapsible section lists the completed evaluation feedback ratings and comments that are provided by peer reviewers. 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 (for example, Goals, Competencies and so on).
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.

Field or Control	Description
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, <i>Peer 1</i> or <i>Other 2</i> .
Role	Displays the role of the evaluator. For example, <i>Peer</i> , <i>Other</i> , 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 <i>N/A</i> . 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.

Note: Participant feedback is not available for review in canceled documents.

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 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 a document is in progress, the author (manager in the case of a manager evaluation, or employee in the case of a self-evaluation) can add, view, or delete attachments, and specify who can see these attachments (when the Evaluation step of the document is completed).

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 from the self-evaluation, and has the option to copy them to the manager evaluation that is in progress, if necessary. Similarly, after the manager evaluation is completed, the employee can view the attachments that are given employee access from the manager evaluation.

The **Attachments** section is displayed as read-only on completed manager evaluations or self-evaluations. A person who is viewing a completed document will be able to view attachments that list his or her user role as attachment audience. For example, a manager will have access to all attachments (including the ones copied from self-evaluations) that are marked for manager access. An employee will not see files on a manager evaluation that are marked for manager access only.

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		
Goals_this_FY.docx	Goals for this fiscal year	Employee and Manage ▾	04/15/2019 8:55:52PM	Rosanna Channing		

+

Add Attachment

Field or Control	Description
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.

Field or Control	Description
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 <i>Employee and Manager</i>, the file can be viewed and downloaded by the employee, manager, the manager's upward management chain, and the ePerformance administrator. If you select <i>Manager Only</i>, the file can only be viewed and downloaded by the manager, the manager's upward management chain, and the ePerformance administrator. If you select <i>Employee Only</i>, the file can only be viewed and downloaded by the employee. 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 <i>In Progress</i> .
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 <i>Evaluation in Progress</i>, 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 PageCopy <section item> from My Documents or Copy <section item> from My Team's Documents Page

Peer Evaluation Page

Use the Peer 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 > Others Performance Evaluations**
- (Classic) **Self Service > Performance Management > Other's Development Documents > Others Development Evaluations**

Click an employee link on the My Current Evaluations for Others page.

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

Annual Review

Peer Evaluation



Job Title
Senior Accounting Manager

Document Type
Annual Review

Template
Annual with Mid-Period Eval

Status
Evaluation in Progress

Reviewer
Netty Owyang

Manager
Betty Locherty

Period
01/01/2019 - 12/31/2019

Document ID
1256

Due Date
01/31/2020

Role
Peer

Enter ratings and comments for each section in this evaluation, if applicable. At any point in time you can save this evaluation by selecting the Save button.

Calculate All Ratings

Section 1 - Competencies

Expand
Collapse

Competency 1: Analytical thinking

Description : - Anticipates obstacles.
- Breaks problems apart systematically
- Makes logical conclusions
- Sees consequences, implications.
- Sees causal relationships, inferences.
• Target Rating: 4-Very Good

Rating
0.00

Comments

Font
Size
B I U

Created By
Profile
04/15/2019 3:52PM

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

Competency 2: Action Oriented

Audit History

Created By	Betty Locherty	04/15/2019 3:52:26PM
Last Modified By	Netty Owyang	04/15/2019 8:23:55PM

The look and feel of the Peer Evaluation page is similar to the Self Evaluation or Manager Evaluation page, although it is not displayed in WorkCenter like the other evaluation pages. The Actions drop down appears below the employee's name if you access the Peer Evaluation page from the **Review Participant Evaluations** step of the WorkCenter as the manager.

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.

This example illustrates the fields and controls on the Edit <section item> page.

Annual Review

Edit Competency

Title Conceptual thinking

Description

- Recognizes key actions, underlying problems
- Makes connections and patterns.
- Recognizes patterns, uses concepts to diagnose situations
- Simplifies, clarifies difficult material.

Target Rating 4-Very Good

Update

[Return](#)

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](#).

Field or Control	Description
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 <i>Basic</i> , <i>Intermediate</i> , and <i>Advanced</i> as its values. When an item from the Content Catalog is added, this field displays the level of difficulty associated with that item and you cannot edit the values. If the item is manually added, you can select the level of difficulty unless the item is marked mandatory on the Template Definition - Content page.
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 <i>Complete</i> , <i>In Progress</i> , and <i>N/A</i> (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.

Consolidating Feedback from Evaluators

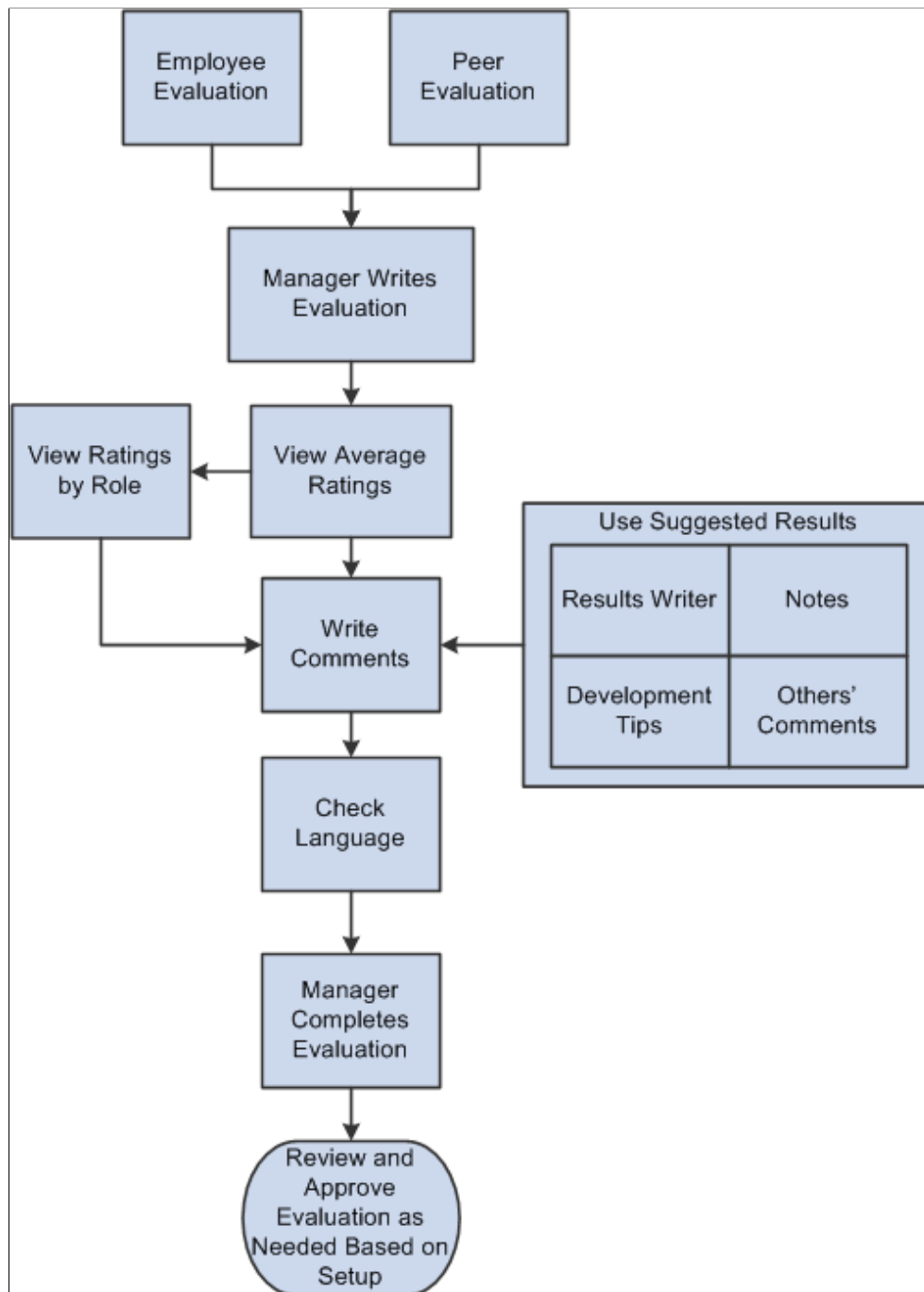
Understanding Feedback Consolidation

This topic discusses:

- Feedback consolidation.
- Ratings.
- View Other Authors.
- Writing Tools.
- Language Checker Tool.
- Reviews and Approvals.

Feedback Consolidation

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 sub-item 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 [Template Definition - Structure Page](#). 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.

Fluid ePerformance supports the creation and management of performance notes at the item level, section level, and header level of documents in any document status.

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](#)

(Classic) Viewing Evaluation Ratings

This topic discusses how to view evaluation ratings in Classic Plus mode.

Note: A fluid version of ePerformance is now available to support employee performance reviews. For more information, see [Understanding Fluid ePerformance](#).

Pages Used to View Evaluation Ratings

<i>Page Name</i>	<i>Definition Name</i>	<i>Usage</i>
<Manager or Self-> Evaluation Page	EP_APPR_MAIN1	View section and item ratings.

Page Name	Definition Name	Usage
<u>Average Ratings Page</u>	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.

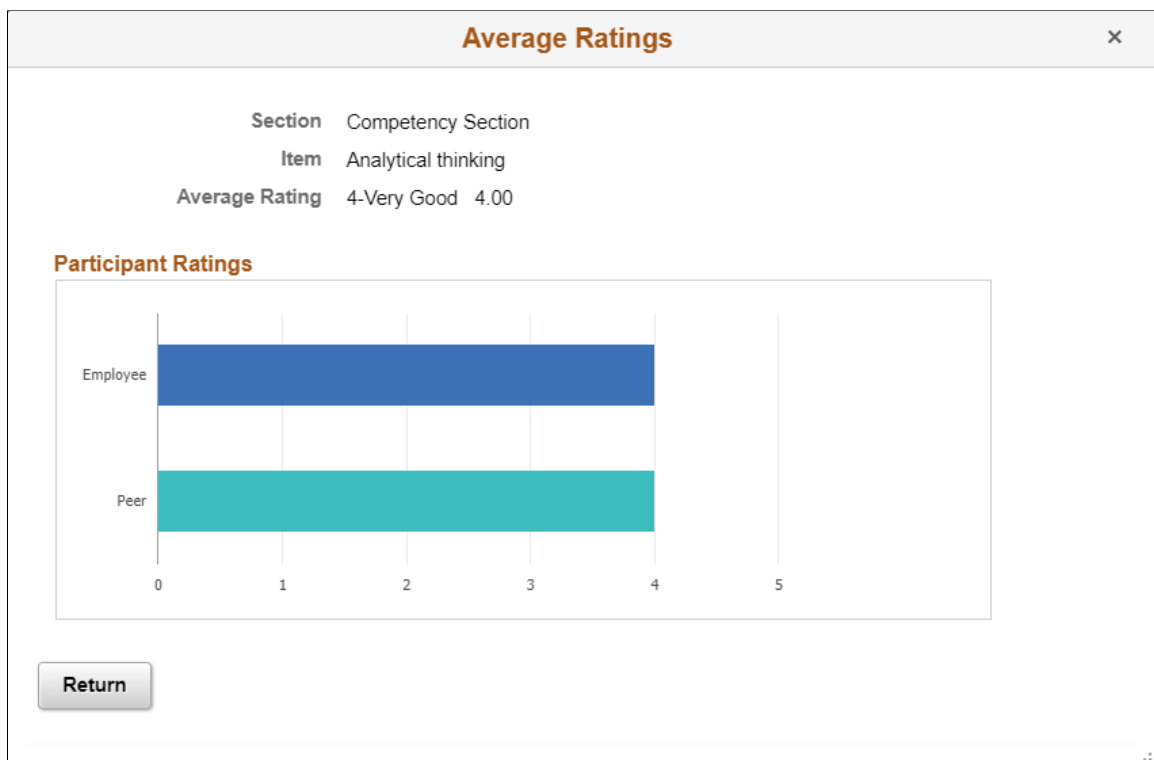
Average Ratings Page

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.

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 sub-item. 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.

(Classic) Working With Writing Tools

This topic discusses how to work with writing tools when entering evaluations.

Note: A fluid version of ePerformance is now available to support employee performance reviews. For more information, see [Understanding Fluid ePerformance](#).

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

<i>Page Name</i>	<i>Definition Name</i>	<i>Usage</i>
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.
Find 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.

This example illustrates the fields and controls on the Writing Tools - Suggested Results page.

Annual Review

Writing Tools - Suggested Results

Suggested Results

1-2 of 2

View All

	Suggested Results Text	Source
☐	I can break problems apart systematically and make logical conclusions.	Rosanna Channing
☐	Rosanna is an excellent manager	Netty Owyang

Select All

Deselect All

Add to Comments

Comments

Font

Size

B

I

U

1

2

3

A

Save and Return

Cancel

Find Additional Content

Go

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.

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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.

Field or Control	Description
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**.

This example illustrates the fields and controls on the Writing Tools - Results Writer Statements page.

Annual Review

Writing Tools - Results Writer Statements

Writing Tools - Results Writer Statements

Search for text

*Competency

Review Rating

Search

Clear

Comments

Font

Size

B

I

U

Save and Return

Cancel

Find Additional Content

Go

Field or Control	Description
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.

Find Development Tips Page

Use the Find 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**.

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

Annual Review

Find Development Tips

Find Development Tips

Search for text

*CompetencyAction Oriented

Sub-CompetencyDrives hard, shows initiative

Review RatingSkilled

SearchClear

Comments

FontSizeB I U

Save and Return

Cancel

Find Additional Content

Go

Field or Control	Description
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.

Field or Control	Description
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

[\(Classic\) 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**.

This example illustrates the fields and controls on the Writing Tools - Evaluators' Comments page.

Annual Review

Writing Tools - Evaluators' Comments

Writing Tools - Evaluators' Comments

Role: Peer

Name: Netty Owyang

Document Section:

Suggested Results

1-2 of 2 | View All

	Suggested Results Text	Name
☐	Rosanna is an excellent manager	Netty Owyang
☐	Rosanna is a visionary.	Netty Owyang

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

Comments

Font Size B I U

Find Additional Content

Use this page to search for comments that were entered by evaluators who are not the manager or employee.

Field or Control	Description
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.

Field or Control	Description
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.

This example illustrates the fields and controls on the Check Language page.

Manager Evaluation

Check Language

Word/Phrase foundAge

Found in...

DescriptionCompetency Section

ResultsAge

ApplyCancel

Change

Ignore

Ignore All

Close

Language Suggestions

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

Proper Usage

Employee lacks the proper managerial training to manage other employees.

Incorrect Usage

Employee is too young to be managing other employees.

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.

Field or Control	Description
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.

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<i>Field or Control</i>	<i>Description</i>
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

[Understanding Advisor Tools](#)

Working With Fluid Performance Management

Understanding Fluid ePerformance

Fluid ePerformance modernizes PeopleSoft ePerformance, providing a refreshing and intuitive user experience for conducting performance reviews.

PeopleSoft ePerformance is a performance management application for employees. It supports the setting and tracking of goals, regular check-ins between the manager and the employee for ongoing feedback, requests for feedback from other reviewers in the organization, communications and sharing of feedback between the manager and the employee in the final evaluation, and approval of evaluation documents.

In Fluid ePerformance, the components and pages for accessing and updating evaluation documents are redesigned to better support the performance review process. The updated look and feel, placement of information and user actions where they are needed, and reduced user clicks have made reviews simpler and easier for all users.

In addition to supporting the existing functionality (see [ePerformance Overview](#) for more information) delivered in the ePerformance application for accessing, creating, and managing evaluations, Fluid ePerformance also provides:

- A modern user interface to enhance the user experience in conducting performance reviews. The new design includes:
 - A redesigned document layout that is optimized for any device.
 - The **More Actions** menu in multiple locations of the document to provide relevant user actions where they are needed.
 - Use of stars to provide ratings.
 - Ability to assign the order in which rating values appear in drop-down rating display.
- Ability to add notes and feedback to items quickly and directly from the document's details page.
- Ability for both the manager and employee to submit participant requests.
- Ability for both the manager and employee to view participant feedback when it is available.
- Ability to rate sections, items and sub-items in the Track Progress step of the review process.
- Ability to make ratings and comments required in sections and items in the Evaluation step, and specify the minimum character count when comments are required.
- Rich text editor support for comments.

- Attachment support throughout the review process.
- Display of the approval monitor in the document when it is in the approval process.

Video: [Image Highlights, PeopleSoft HCM Update Image 45: Fluidize Performance Management Document](#)

ePerformance Versions

We use these terms in the ePerformance product documentation as needed to refer to the supported versions, *Fluid ePerformance* and *Classic ePerformance*.

Note: Both versions support the same performance management processes and functionality in general, for that we use the same document content. Any differences in behavior between these versions will be identified using these terms wherever appropriate.

- *Fluid ePerformance* – this is the full Fluid version of ePerformance in which both document lists as well as document pages used in performance reviews are completely redesigned in Fluid.

Users with roles listed in [Delivered Roles for Fluid ePerformance](#) have access to the Fluid ePerformance functionality.

See [\(Fluid\) Working With ePerformance Document Lists](#) and [\(Fluid\) Working With ePerformance Documents](#).

- *Classic ePerformance* – this is the hybrid version of ePerformance in which document lists are available in navigation collections in Fluid, whereas the document pages used in performance reviews are displayed in Classic Plus mode.

Note: This is the version available for use if the Fluid ePerformance functionality is not applied to the system.

Users with the *ePerformance Employee Fluid* or *ePerformance Manager Fluid* role have access to the Classic ePerformance functionality.

See [Accessing Performance Documents as Managers Using Fluid Navigation Collection](#), [Accessing Performance Documents as Employees Using Fluid Navigation Collection](#) and [\(Classic\) Modifying Evaluation Criteria](#).

Fluid ePerformance Setup

Fluid ePerformance uses the same installation and setup pages (for example, section and template definitions) as Classic ePerformance. New, fluid-only options are also added on these pages for Fluid ePerformance. For options that apply only to one version but not both, they will be stated properly in corresponding topics.

For more information about ePerformance setup, refer to topics in the *Setting Up ePerformance* and *Setting Up Document Templates* chapters of *PeopleSoft HCM: ePerformance*.

The system delivers lists of actions for the **More Actions** menu used in different locations of a document on the [Fluid Popup Menu Setup Page](#). For more information about the **More Actions** menu, see [Understanding the More Actions menu](#).

ePerformance supports the insertion of business objectives as items in performance documents and the alignment of performance document items to business objectives. Refer to the [Setting Up Business Objectives To Work With Performance Documents](#) topic for more information about the steps and key points recommended for the setup.

Delivered Roles for Fluid ePerformance

The system delivers these roles for the Fluid ePerformance functionality:

- (Administrator) *ePerformance HR Admin Fluid* (Administer ePerformance Fluid)
- (Manager) *Fluid Dashboard - MSS ePerf* (Manager ePerformance Dashboard)

This role provides access to the [Team Performance Dashboard](#) after selecting the **Team Performance** tile.

- (Employee) *Fluid Dashboard - ESS ePerf* (Empl ePerformance Dashboard)

This role provides access to the [Performance Dashboard](#) after selecting the **Performance** tile.

Important! (Manager and employee) In Fluid ePerformance, users without any fluid dashboard role continue to access their document lists using respective navigation collections. They work with performance documents using Fluid pages the same way as the users who have the fluid dashboard roles. Users still need *ePerformance Manager Fluid* and *ePerformance Employee Fluid* roles to take advantage of the Fluid ePerformance functionality.

Permission Lists for Fluid ePerformance

Oracle delivers these permission lists for Fluid ePerformance:

- HCCPSS1360 (ePerformance Employee Fluid)
- HCCPSS2160 (ePerformance Manager Fluid)
- HCCPEP2260 (ePerformance - HR Admin Fluid)

Considerations for Implementing Fluid ePerformance

Here are a few points to keep in mind as you plan to uptake Fluid ePerformance:

- Consider switching over to Fluid ePerformance after the conclusion of a review period rather than in the middle of the review cycle if possible.
- To avoid unexpected system behavior, do not switch back to Classic ePerformance after Fluid ePerformance is applied.
- To ensure that the system works properly when the manager or employee adds or submits participants for performance reviews, both users should be switched to using Fluid ePerformance.
- Create new document templates to leverage the new options that are introduced in Fluid ePerformance.

Fluid ePerformance Topics

Fluid ePerformance is discussed in these topics.

- [\(Fluid\) Accessing ePerformance Tiles and Pages](#)

Lists the tiles and dashboard pages to access evaluation documents in Manager Self-Service and Employee Self-Service.

- [\(Fluid\) Working With ePerformance Document Lists](#)

Lists the evaluation document lists used by the manager and the employee to manage their documents.

- [\(Fluid\) Working With ePerformance Documents](#)

Discusses all Fluid pages and common elements delivered for conducting performance reviews.

- [\(Fluid\) Modifying Evaluation Criteria](#)

Lists pages used to work on the **Define Criteria** step and information that is specific to this step.

- [\(Fluid\) Tracking Mid-Period Progress](#)

Lists pages used to work on the **Checkpoint** and **Finalize Criteria** steps (or collectively known as **Track Progress**) and information that is specific to these steps.

- [\(Fluid\) Managing Participant Requests and Evaluations](#)

Lists pages used to work with participant requests and entering participant evaluations.

- [\(Fluid\) Updating Evaluations](#)

Lists pages used to work on the **Evaluation** step and information that is specific to this step.

Related Links

[ePerformance Overview](#)

[ePerformance Business Processes](#)

(Fluid) Accessing ePerformance Tiles and Pages

This topic lists the tiles and dashboard page delivered for users to access ePerformance tasks in Manager and Employee Self-Service.

Pages Used to Access ePerformance Tiles and Pages

Component or Page Name	Definition Name	Usage
<u>Team Performance Tile</u>	HC_EP_DASHBOARD_FL_GBL_LINK (cref for the tile) (for users with <i>Fluid Dashboard - MSS ePerf</i> role) HC_EP_MSS_SELECT_FLU_GBL (cref for the tile) (for users with <i>ePerformance Manager Fluid</i> role) EP_MSS_TILE_FLU (page for dynamic data)	(Manager) Access the Team Performance dashboard for a collection of ePerformance tasks in a central location.
<u>Team Performance Dashboard</u>	PT_LANDINGPAGE	(Manager) Access tiles for managing team documents and business objectives, performing administrative tasks, and viewing team document distribution by status and team performance insights.
<u>Team Documents Tile</u>	HC_EP_DOC_SELECT_FL_GBL (cref for the tile)	(Manager) Access the pages to manage evaluation documents for their teams and documents that are delegated to them.
<u>Business Objectives Tile</u>	HC_EPO_UPDT_MY_OBJ_LNK (cref for the tile)	(Manager) Access the Business Objectives page.
<u>Administrative Tasks Tile</u>	HC_EP_DOCTASKS_FL_GBL (cref for the tile)	(Manager) Perform administrative tasks on documents.
Performance Status Tile	HC_EP_DOCSTS_NUI_FL_GBL (cref for the tile)	(Manager) View the distribution of team documents by status, department, manager, and location.
<u>Team Document Insights Tile</u>	HC_EP_TMDOC_ANALYTICS_FL (cref for the tile)	(Manager) Access the Team Document Analytics dashboard and analyze status information of performance review documents for their direct and indirect reports.
<u>Team Performance Insights Tile</u>	HC_EP_TMPERF_ANALYTICS_FL (cref for the tile)	(Manager) Access the Team Performance Analytics dashboard and analyze the overall employee performance of their teams.
<u>Performance Tile</u>	HC_EP_EE_DASHBOARD_FL_GBL_LINK (cref for the tile) (for users with <i>Fluid Dashboard - ESS ePerf</i> role) HC_EP_EE_SELECT_FLU (cref for the tile) (for users with <i>ePerformance Employee Fluid</i> role)	(Employee) Access the Performance dashboard for a collection of ePerformance transactions for employees in a central location.

Component or Page Name	Definition Name	Usage
<u>Performance Dashboard</u>	PT_LANDINGPAGE	(Employee) Access tiles for managing employees' own performance documents and viewing business objectives.
<u>My Documents Tile</u>	HC_EP_EEDOC_SELECT_FL_GBL (cref for the tile) EP_EE_TILE_FLU (page for dynamic data)	(Employee) Access employees' own evaluation documents and peer reviews.
<u>View Business Objectives Tile</u>	HC_EPO_VIEW_MY_OBJ_EE_FL_GBL (cref for the tile)	(Employee) Access the View Business Objectives page.

Prerequisites

Users must be assigned the appropriate roles to access Fluid ePerformance functionality as managers and employees. See the [Delivered Roles for Fluid ePerformance](#) topic for more information.

Team Performance Tile

(Manager) Use the Team Performance tile (HC_EP_DASHBOARD_FL_GBL_LINK) to access the Team Performance dashboard for a collection of ePerformance tasks in a central location.

Navigation:

The Team Performance tile is delivered as part of the Manager Self Service home page, but the location can be changed based on your preference.

This example illustrates the Team Performance tile.



Use this tile to access the [Team Performance Dashboard](#), which includes additional tiles for working with team documents, business objectives, administrative tasks, and performance document analytics (pivot grid) as managers.

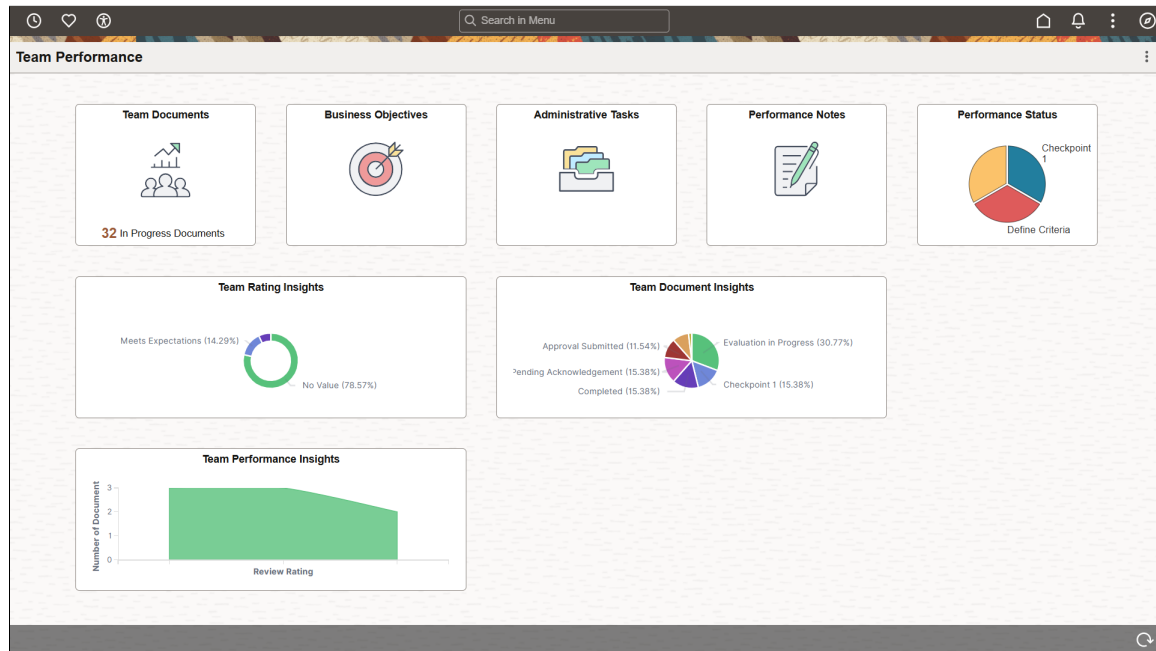
Team Performance Dashboard

(Manager) Use the Team Performance dashboard (PT_LANDINGPAGE) to access tiles for managing team documents and business objectives, performing administrative tasks, viewing team document distribution by status and team performance insights.

Navigation:

Click the **Team Performance** tile.

This example illustrates the Team Performance dashboard.



The Team Performance dashboard provides managers quick access to fluid ePerformance components from one location.

The dashboard lists the components collected under these tiles, and can be personalized as needed:

- [Team Documents Tile](#)
- [Business Objectives Tile](#)
- [Administrative Tasks Tile](#)
- [Performance Notes Tile](#)
- [Performance Status Tile](#)

See Also [Team Performance Status Page](#).

- [Team Rating Insights Tile](#)
- [Team Document Insights Tile](#)
- [Team Performance Insights Tile](#)

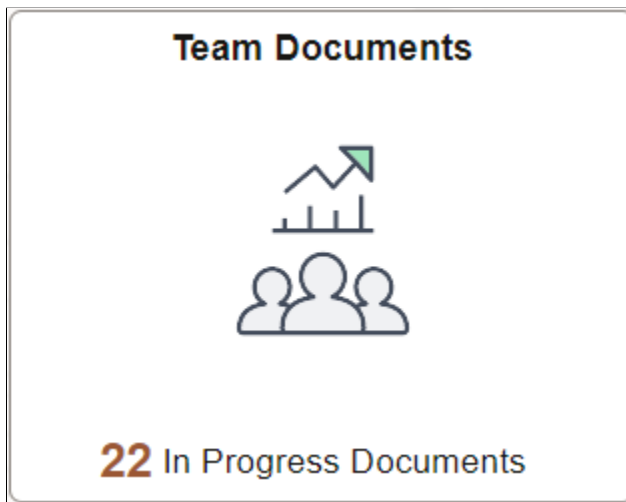
Team Documents Tile

(Manager) Use the Team Documents tile (HC_EP_DOC_SELECT_FL_GBL) to access the pages to manage evaluation documents for their teams and documents that are delegated to them.

Navigation:

The Team Documents tile is located on the [Team Performance Dashboard](#).

This example illustrates the Team Documents tile.



The Team Documents tile displays the number of documents that are currently *In Progress*. A document is considered *In Progress* if the document status is not *Canceled* or *Completed*.

If no documents are available, no information is displayed on the tile.

See [Team Documents - Team Documents Page](#) and [Team Documents - Delegated Documents Page](#).

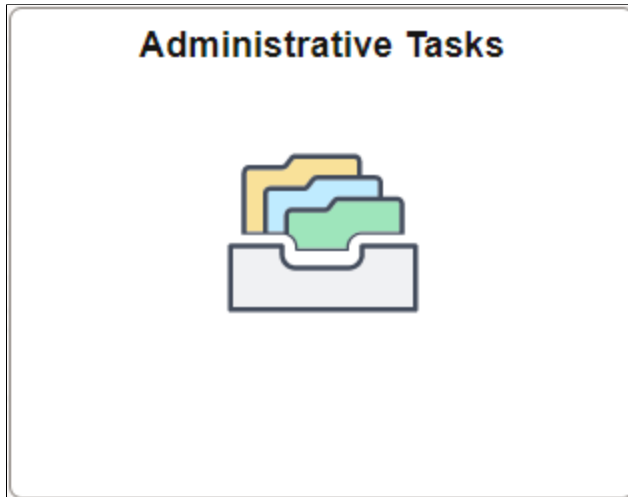
Administrative Tasks Tile

(Manager) Use the Administrative Tasks tile (HC_EP_DOCTASKS_FL_GBL) to perform administrative tasks on documents.

Navigation:

The Administrative Tasks tile is located on the [Team Performance Dashboard](#).

This example illustrates the Administrative Tasks tile.



Use the tile to access a navigation collection that lists these ePerformance administrative transaction pages:

- Transfer Documents. See [Transfer Documents Page \(Team Performance\)](#).
- Reopen Documents. See [Reopen Documents Page \(Team Performance\)](#).
- Cancel Documents. See [Cancel Documents Page \(Team Performance\)](#).
- Delete Documents. See [Delete Documents Page \(Team Performance\)](#).
- Enter Preliminary Ratings. See [Enter Preliminary Ratings Page \(Team Performance\)](#).
- View-Only Documents. See [View-Only Documents - Select Employee Page \(Team Performance\)](#).
- Create Documents by Group. See [Create Documents by Group - Select Group Page \(Team Performance\)](#).

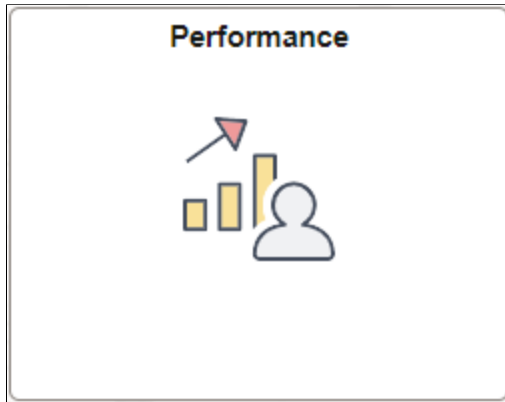
Performance Tile

(Employee) Use the Performance tile (HC_EP_EE_DASHBOARD_FL_GBL_LINK) to access the Performance dashboard for a collection of ePerformance transactions for employees in a central location.

Navigation:

The Performance tile is delivered as part of the Employee Self Service home page, but the location can be changed based on your preference.

This example illustrates the Performance tile.



Use this tile to access the [Performance Dashboard](#), which includes additional tiles for working with performance documents and viewing business objectives as employees.

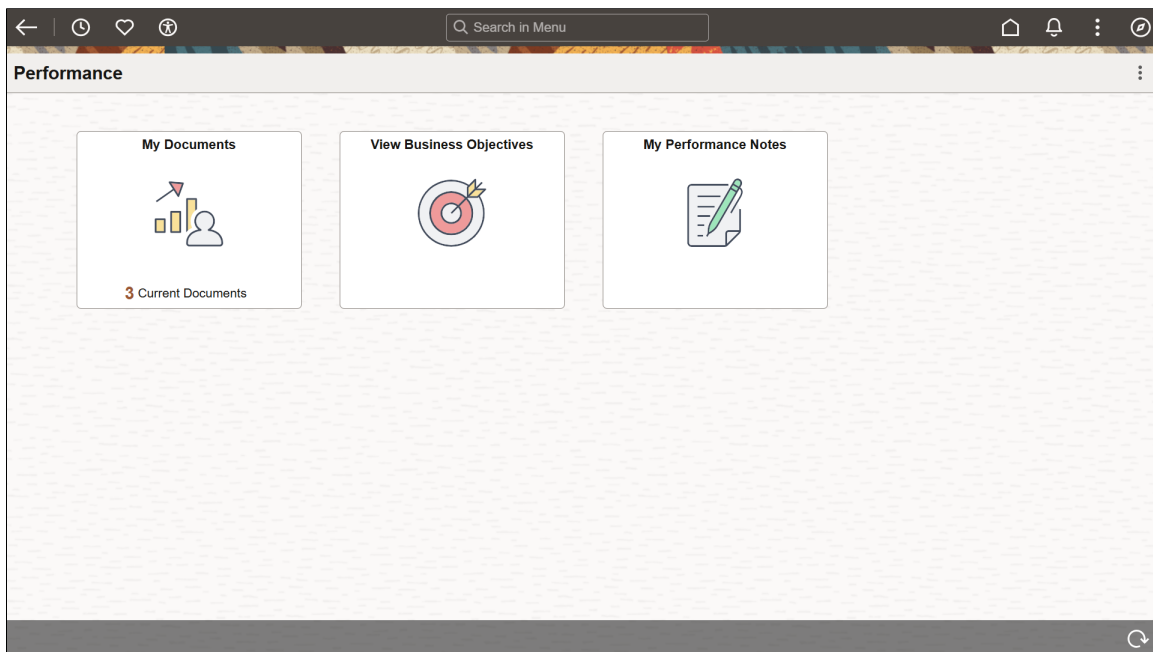
Performance Dashboard

(Employee) Use the Performance dashboard (PT_LANDINGPAGE) to access tiles for managing employees' own performance documents and viewing business objectives.

Navigation:

Click the **Performance** tile.

This example illustrates the Performance dashboard.



The Performance dashboard provides employees quick access to fluid ePerformance components from one location.

The dashboard lists the components collected under these tiles, and can be personalized as needed:

- [My Documents Tile](#)
- [View Business Objectives Tile](#)
- [My Performance Notes Tile](#)

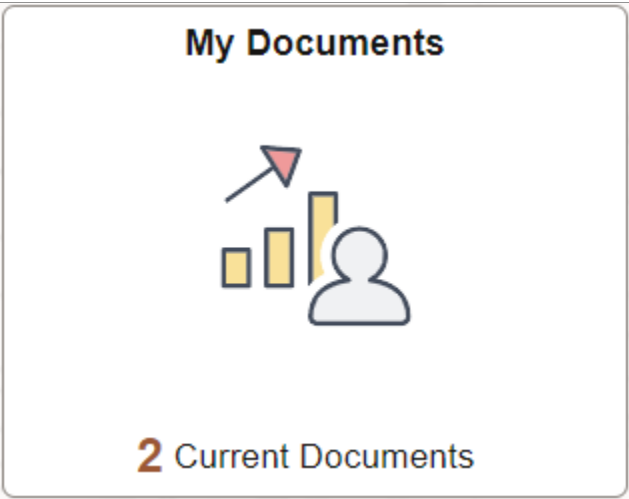
My Documents Tile

(Employee) Use the My Documents tile (HC_EP_EEDOC_SELECT_FL_GBL) to manage employees' own evaluations and evaluations of others.

Navigation:

The My Documents tile is located on the [Performance Dashboard](#).

This example illustrates the My Documents tile.



Use the tile to manage self-evaluations and participant evaluations on the [My Documents - My Documents Page](#) and [My Documents - Evaluations of Others Page](#) respectively.

(Fluid) Working With ePerformance Document Lists

This topic discusses the document lists available to managers to work with team documents and delegated documents. It also discusses the document lists that employees use to manage their own evaluations, as well as evaluations of others.

Pages Used to Work with ePerformance Document Lists

<i>Page Name</i>	<i>Definition Name</i>	<i>Usage</i>
Team Documents - Team Documents Page	EP_DOC_SELECT_FL	Create or manage documents for your team as the manager.

Page Name	Definition Name	Usage
<u>Team Documents - Delegated Documents Page</u>	EP_DOC_SELECT_FL	Manage documents that are delegated to you as the manager.
<u>My Documents - My Documents Page</u>	EP_EEDOC_SELECT_FL	Create or manage self-evaluations as the employee.
<u>My Documents - Evaluations of Others Page</u>	EP_EEDOC_SELECT_FL	Manage evaluations you provide for other employees.

Team Documents - Team Documents Page

(Manager) Use the Team Documents - Team Documents page (EP_DOC_SELECT_FL) to create or manage documents for your team as the manager.

Navigation:

Click the Team Documents Tile.

This example illustrates the Team Documents page that displays a list of ePerformance documents for your team members on the Team Documents tab.

Team Documents

New Search

Period Begin Date

MM/DD/YYYY

Period End Date

MM/DD/YYYY

☐ Match Exact Dates
 ☐ Include Historical Documents

Name

Search

Clear

Employee

☐ Amelia Lucas
 ☐ Cynthia Adams
 ☐ Daryl Reese
 ☐ Diane Palmer

Team Documents

Delegated Documents

Create Documents

Search by Name...

→

Define Criteria

Tina Palisco

Manager-Accounting

Annual Review • 1 Jan - 31 Dec 2024

Due 14 Jun 2024

Preliminary Rating: Company Maker

Cynthia Adams

Corporate Controller

Annual Review • 1 Jan - 31 Dec 2024

Due 14 Jun 2024

Preliminary Rating: Company Maker

Diane Palmer

Administrative Assistant

Annual Review • 1 Jan - 31 Dec 2024

Due 14 Jun 2024

Preliminary Rating: Exceeds Expectations

Rosanna Channing

Senior Accounting Manager

Annual Review • 1 Jan - 31 Dec 2024

Due 14 Jun 2024

Preliminary Rating: Needs Improvement

Track Progress

Cynthia Adams

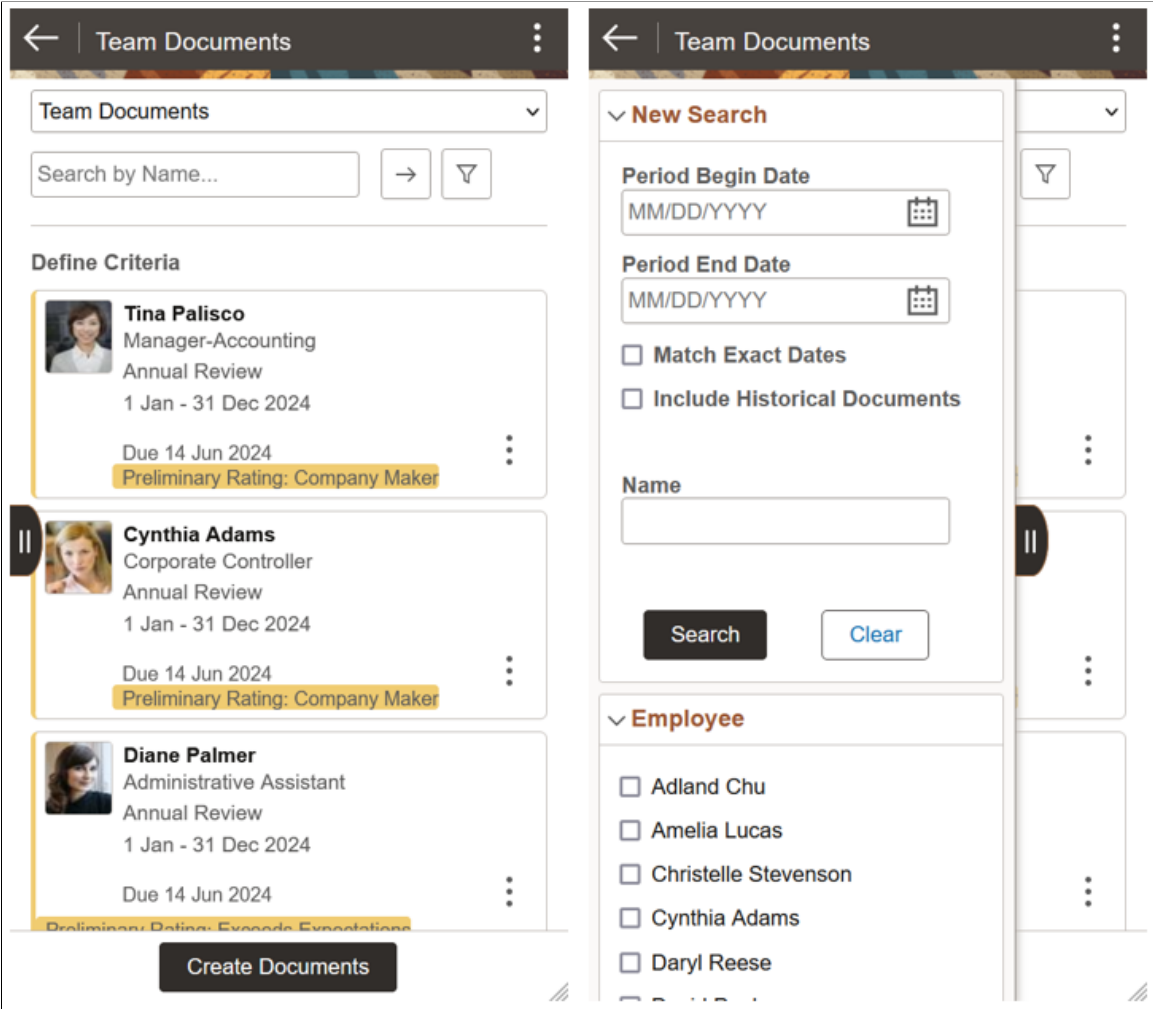
Corporate Controller

Annual Review • 1 Jan - 31 Dec 2014

Checkpoint 1 • Due 18 Jul 2014

Preliminary Rating: Needs Improvement

The example on the left illustrates the Team Documents page for the smartphone. The example on the right displays the filter panel that is expanded on the Team Documents page.



Field or Control	Description
	Click to display or hide search and facets on the left panel of the page. Facets are displayed by default in large screen display. The panel displays the facet values based on the results that appear in the document list on the right panel.

Field or Control	Description
New Search	Use Period Begin Date, Period End Date, or both fields to refine the search by date range, if applicable. For example, enter <i>01/01/2022</i> as the period begin date to find documents with a begin date that is equal to or later than January 1, 2022. Enter <i>12/31/2022</i> as the period end date to find documents with an end date that is equal to or earlier than December 31, 2022. Select the Match Exact Dates option if you want to find documents with the time period that match the exact Period Begin Date and Period End Date values only. Select the Include Historical Documents option to display <i>Completed</i> and <i>Canceled</i> documents of matching criteria in the document list. Use the Name field to search for documents by employee name. Use the Search button to perform search using specified values and options. Click the Clear button to remove all filters that are currently applied to the document list. Note: The system maintains the search values and options that you specified in the New Search section when you navigate between lists of the same component. For example, if you specify a period begin date for the team documents list, the same value is displayed when you return to it from the delegated documents list. However, search values and options in the New Search section are not retained, when you navigate away from the lists and come back. For example, if you return to the Team Performance dashboard to work on some tasks and later come back to the document list, values previously specified in the New Search section will be cleared.
<Facets>	You can filter the search results further using these facets: Employee: Select one or more employees. This facet shows the first 10 employees on your team, sorted by the employee first name in ascending order. Click the More link to view additional employees returned in the search results. Document Usage: Possible values are <i>Performance</i> and <i>Development</i> documents. Document Type: Select to refine the search results by document type, if applicable. Document Status: Shows available document statuses that can be used to refine the search results. Note: Facet selections are not retained when you navigate to a different component and return to the list.

Field or Control	Description
Create Documents	Click this link to create ePerformance documents for the team members selected on the Select Employee(s) Page and Create Documents Page (Team Performance) .
<search field>	Enter a full or partial employee name for the search. Use the % symbol for wildcard searches if needed.
	Click to perform the search. The same employee name value also appears in the New Search facet of the left panel.
 or 	Click to display or collapse search and facets on the left panel of the page. This button is displayed in color, if search or facet values are applied to filter the document list.

Document List

Note: When you access the list initially, the system lists all current documents (documents that are not *Completed* or *Canceled*) that pertain to you by default.

The system also uses the **Display in Document List** option in the document type setup to determine which documents to display in document lists. If the option is selected for your role on the [Document Types Page](#), documents that belong to this document type will be displayed.

The *Evaluations of Others* document list is not affected by this display option.

Grouped by document status, documents are displayed in the following order:

Define Criteria: Lists documents that are in the *Define Criteria* step of the review process. See [\(Fluid\) Modifying Evaluation Criteria](#).

Track Progress: Lists documents that are in the *Checkpoint* or *Finalize Criteria* step of the review process. See [\(Fluid\) Tracking Mid-Period Progress](#).

Evaluation in Progress: Lists documents that are being evaluated. See [\(Fluid\) Updating Evaluations](#).

Shared with Employee: Lists documents that have been shared with the employee. This status applies to documents that require the employee to review ratings and comments from the manager and provide employee feedback, as part of the review process. See [\(Fluid\) Updating Evaluations](#).

Pending Acknowledgment: Lists documents that have been sent to the employee to provide acknowledgment after meeting with the manager to discuss the evaluation. See [\(Fluid\) Updating Evaluations](#).

Acknowledged: Lists documents that have been acknowledged. See [\(Fluid\) Updating Evaluations](#).

Approval: Lists documents that have been approved. This status applies to documents that require approval as part of the review process. See [\(Fluid\) Updating Evaluations](#).

Completed: Lists documents that were completed, with review ratings if available. This section is displayed if the **Include Historical Documents** option is selected.

Canceled: Lists documents that were canceled. This section is displayed if the **Include Historical Documents** option is selected.

This example shows document list, grouped by document status.

Define Criteria



Christina Goodwill

Accountant

Performance Document • 1 Jan - 31 Dec 2022

Due 31 Dec 2022

Track Progress



Alex Duncan

Accountant

Performance Document • 1 Jan - 31 Dec 2022

Checkpoint 1 • Due 24 Jul 2022

Each document is displayed as a card, which shows information about the document, such as:

- Employee's name, photo, position or job title.
- Document type and review period.
- Highlight information that is specific to the document status (or step), for example, due date of the current document step, preliminary rating (visible to managers only), overall rating, or sub-status (for *Track Progress* and *Approval* document statuses).

Field or Control	Description
<Employee name>	Click the link to open the document for review or update. See Performance Document Page .
	Click to view the list of actions that are applicable to the document and select an action to perform from the More Actions menu. The list of actions varies based on a few factors, such as the template setup, the current step of the document, and your user role. See Document-Level More Actions .

Preferred Name Display

The document lists show employee names based on the display name setup in the Name Format tables, which supports preferred names.

However, when you select a document to view or update on the document page, the employee name display can be different, depending upon the time period of the document. Suppose that the employee

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added an additional name (preferred first name) that is effective today and the display name setup includes preferred first name:

- If the period end date of the document is in the future, the preferred first name is used in place of the default first name, and appears in the employee's full name in the document.
- If the period end date of the document is in the past, the default first name is used, and the preferred first name does not appear in the employee's full name in the document.

See Also “Setting Up Additional Name Information” (Application Fundamentals).

Team Documents - Delegated Documents Page

(Manager) Use the Team Documents - Delegated Documents page (EP_DOC_SELECT_FL) to manage documents that are delegated to you as the manager.

Navigation:

Click the [Team Documents Tile](#), then the **Delegated Documents** page.

This example illustrates the Team Documents - Delegated Documents page that displays a list of ePerformance documents currently delegated to you.

Team Documents

▼ **New Search**

Period Begin Date
MM/DD/YYYY

Period End Date
MM/DD/YYYY

☐ Match Exact Dates

Name

Search **Clear**

▼ **Employee**

- ☐ Christelle Stevenson
- ☐ Daryl Reese
- ☐ David Ho
- ☐ Edmund Donahue
- ☐ John Patterson
- ☐ Mei Lee

Team Documents **Delegated Documents**

Documents for Rosanna Channing Search by Name... → ▾

Define Criteria

	Daryl Reese Financial Analyst Performance Document • 2 Jan - 30 Dec 2023	Due 30 Dec 2023	⋮
	Christelle Stevenson Manager-Accounting Performance Document • 2 Jan - 30 Dec 2023	Due 30 Dec 2023	⋮
	John Patterson Manager-Revenue Annual Review • 1 Jan - 31 Dec 2023	Due 14 Jun 2023	⋮
	Christelle Stevenson Manager-Accounting Annual Review • 1 Jan - 31 Dec 2023	Due 14 Jun 2023	⋮
	Edmund Donahue Manager-Accounting Annual Review • 1 Jan - 31 Dec 2023	Due 14 Jun 2023	⋮
	Daryl Reese Financial Analyst Performance Document • 1 Jan - 30 Dec 2023	Due 30 Dec 2023	⋮

The **Delegated Documents** tab appears if you have accepted one or more requests to be the delegated manager for others and will be managing in-progress documents for them.

Both the [Team Documents - Team Documents Page](#) and **Team Documents - Delegated Documents** page work the same in terms of searching and filtering the document list and working with individual documents. However, there are a few differences worth noting when you work on the **Delegated Documents** page:

- The **Document for** field is displayed to show the manager who delegated the list of documents to you. It becomes a drop-down list if you have accepted multiple delegations. Use the drop-down list to filter the list by delegator.
- You cannot create new documents.

- Search for historical documents is not supported.

My Documents - My Documents Page

(Employee) Use the My Documents - My Documents page (EP_EEDOC_SELECT_FL) to create or manage self-evaluations as the employee.

Navigation:

Click the [My Documents Tile](#).

Both the [Team Documents - Team Documents Page](#) and **My Documents - My Documents** page work the same in terms of searching and filtering the document list and working with individual documents. There is one difference when you work on the **My Document** page as an employee: the search field is not available to look up other employees because you have access to your own documents only.

This example illustrates the My Documents - My Documents page that displays your own evaluation documents.

My Documents

▼ **New Search**

Period Begin Date
MM/DD/YYYY

Period End Date
MM/DD/YYYY

☐ Match Exact Dates

☐ Include Historical Documents

Search **Clear**

▼ **Document Usage**

☐ Performance

▼ **Document Type**

☐ Annual Review

▼ **Document Status**

☐ Track Progress

My Documents Evaluations of Others [+ Create Document](#)

Documents for John Patterson

Track Progress

Annual Review
Manager-Revenue
1 Jan - 31 Dec 2023

Checkpoint 1 • Due 22 Sep 2023

My Documents - Evaluations of Others Page

(Employee) Use the My Documents - Evaluations of Others page (EP_EEDOC_SELECT_FL) to manage evaluations that you provide for other employees.

Navigation:

Click the [My Documents Tile](#), then the **Evaluations of Others** page.

This example illustrates the My Documents - Evaluations of Others page that displays review requests and participant evaluations that you provide for other employees.

Both the My Documents - My Documents Page and **My Documents - Evaluations of Others** page work the same in terms of searching and filtering the document list and working with individual documents. However, there are some differences worth noting when you work on the **Evaluations of Others** tab as an employee:

- Participant evaluation documents are grouped by status, including:
 - Pending Requests:** Lists evaluations that are pending acceptance. Accept or decline a request using the available buttons. The system asks that you provide a reason when you decline a request. Declined requests are removed from the document list.
-
- Note:** The use of filters does not apply to pending requests.
-
- Not Started:** Lists evaluations that were just accepted and have not been updated.
 - Evaluation in Progress:** Lists evaluations that are currently in progress.
 - Completed:** Lists documents that were completed. This section is displayed if the **Include Historical Documents** option is selected.
 - Canceled:** Lists documents that were canceled. This section is displayed if the **Include Historical Documents** option is selected.
- Participants enter feedback on the Performance Document page. The manager views completed participant evaluations on the Participant Evaluation page.

See Performance Document Page (Participant Evaluation) or Participant Evaluation Page.

(Fluid) Working With ePerformance Documents

This topic lists common elements and pages used to work with documents in Fluid ePerformance.

In this topic, you will find:

- An overview of the structure of the Performance Document component, which is used throughout the review process in all steps.

ePerformance supports two document usages, *Performance* and *Development*. The same component is used for both performance and development documents.

Important! The term *performance documents* is used collectively for both performance and development documents in this documentation unless stated otherwise.

- Information about the **More Actions** menu and lists of supported actions.
- A complete list of pages used to support the creation, processing, and completion of performance documents in Fluid. These pages will also be referenced in other topics that are specific to document steps.

The following videos provide overviews of the writing tools and language checker features and other enhancements:

Video: [Image Highlights, PeopleSoft HCM Update Image 46: Performance Management Writing Tools and Language Checker](#)

Video: [Image Highlights, PeopleSoft HCM Update Image 47: Fluid Performance Management Enhancements](#)

Pages Used to Work with ePerformance Documents

Page Name	Definition Name	Usage
Performance Document Page	EP_MAIN_DOC_B_FL or EP_MAIN_DOC_FL	Update documents in various steps of the review process.
Select/Create Items Page	EP_ADD_ITEM_SCF	Add items to document sections.
Select/Create Items - Pre-defined Page	EP_ADD_ITEM_SCF	Add pre-defined items to document sections.
Select/Create Items - Your Own Page	EP_ADD_ITEM_SCF	Add items that you create manually to document sections.
Select/Create Items - Business Objectives Page	EP_ADD_ITEM_SCF	Add items from business objectives to document sections.

<i>Page Name</i>	<i>Definition Name</i>	<i>Usage</i>
<u>Select/Create Items - Manager Document Page</u>	EP_ADD_ITEM_SCF	(Employee only) Add items from your manager's documents to document sections.
<u>Select/Create Items - My Document Page</u>	EP_ADD_ITEM_SCF	Add items from the manager's or employee's own documents to document sections.
<u>Select/Create Items - Team Document Page</u>	EP_ADD_ITEM_SCF	(Manager only) Add items from your team's documents to document sections.
<u><Section Name> in List Page</u>	EP_MAIN_ADDITM_SCF	View or remove items from the document section.
<u>Details Page</u>	EP_MAIN_OINFO_SCF	View additional information of the item.
<u>Performance Document Item Page</u>	EP_MAIN_B_ITMED_FL EP_MAIN_ITMED_FL	View or update item details.
<u>Alignment Chain Page</u>	EPO_ALIGN_CHN_SCF	View the alignment of the current objective with its corporate or departmental objectives in the organization.
<u>Sub-Items Page</u>	EP_MAIN_ADDSUB_SCF	Add pre-defined sub-items to items.
<u>My Notes Page</u>	EP_MAIN_NOTES_SCF	Add, update or delete notes.
<u>Quick Evaluation Page</u>	EP_QUIK_EVAL_SCF	Enter or view feedback for individual items.
<u>Notify Page</u>	EP_EMAIL_NOTIFY_FL	Send messages about the document.
<u>Rating History Page</u>	EP_HDR_RATING_SCF	View past overall rating information for the employee for the same document type, if available.
<u>360 Graphical View Page</u>	EP_360_REPORT	View ratings from all evaluators and the calculated average rating for each section, item and sub-item of the document.
<u>Attachment Page</u>	EP_ATTACH_SCF	Add or view file attachments in the document.

<i>Page Name</i>	<i>Definition Name</i>	<i>Usage</i>
<u>Check Language Page</u>	EP_LNG_CHECK_SCF	Check for inappropriate use of words and phrases in comments entered in the manager's document.
<u>Last Updated Page</u>	EP_AUDIT_SCF	View the audit information of documents or items.
<u>Performance Process Overview Page</u>	EP_APPR_HELP_SCF	View the description and objective of each step in the performance process.
<u><Section or Item> Weight Page</u>	EP_SECT_WEIGHT_SCF EP_ITEM_WEIGHT_SCF	Update document section (or item) weights.
<u>Reorder Items Page</u>	EP_MAIN_REORD_SCF	Change the order of items displayed in document sections.
<u><Section> Page (Delete Multiple Items)</u>	EP_ITEM_SELECT_SCF	Remove one or more items from document sections.
<u>Exclude Item Ratings Page</u>	EP_ITEM_EXCLUD_SCF	Select items or sub-items to be excluded from overall rating calculation.
<u>Exclude Rating Page</u>	EP_ITEM_EXCLUD_SCF	Select the corresponding item or sub-items to be excluded from overall rating calculation.
<u>Excluded Items Page</u>	EP_ITEM_EXCLUD_SCF	View items and sub-items that are excluded from the overall rating calculation.
<u>Instructions Page</u>	EP_MAIN_INSTR_SCF	View user instructions for document steps or sections.
<u>Average Ratings Page</u>	EP_AVG_CHART_SCF	View ratings from all evaluators in a horizontal bar chart.
<u>Copy to Other Documents Page</u>	EP_APPR_SEL_CPY_FL	Copy individual items to other employees' documents.
<u>Rating Model Page</u>	EP_RTGM DL_POPUP_FL	View descriptions of the rating values that are available in the rating model.
<u>Writing Suggestions - All Page</u>	EP_WRITE_TOOL_SCF	Select suggested texts as review comments.

Page Name	Definition Name	Usage
Writing Suggestions - Evaluators' Comment Page	EP_WRITE_TOOL_SCF	Select existing comments from other evaluators as review comments.
Writing Suggestions - Development Tips Page	EP_WRITE_TOOL_SCF	Select development tips as review comments.
Writing Suggestions - Results Writer Page	EP_WRITE_TOOL_SCF	Select results writer statements as review comments.
Writing Suggestions - Performance Notes Page	EP_WRITE_TOOL_SCF	Select your own performance notes as review comments.

Understanding the Document Structure

A performance document consists of:

- Document header, which displays general information about the document and the employee when expanded. Some of the fields are controlled by the template.

In this documentation, *manager* refers to the individual listed in the document header as the manager of the document. Depending on how the document was created, this person may or may not be the employee's direct manager.

- Document body, which includes one or more sections on which the employee is evaluated. This is the area where evaluation criteria are defined, checkpoint progress tracked, and feedback entered by reviewers (manager, employee, and participants) regarding the employee's performance.

See [Performance Document Page](#).

This example displays a document that is used for employee evaluation. The header area is expanded to show document and employee information. The document body displays different sections of the evaluation.

Performance Document

In Progress

Preliminary Rating: Exceeds Expectations



Rosanna Channing

Senior Accounting Manager • 1 Jan - 31 Dec 2024

Document
1345 - Annual Review

Template
Annual w/ MidPeriod & Career

Period
1 Jan - 31 Dec 2024

Due Date
14 Jun 2024

Manager
Betty Locherty

> Instructions

Step 1 of 4

Define Criteria

Complete

Goals

Section Weight 0 % • Evaluated by Employee, Manager, Peer

Ensure Customer Satisfaction

No Due Date • Weight 0%

Competencies

Career Plan Summary

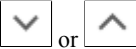
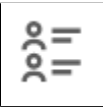
Back to Top

Note: When you select to view a completed or canceled document from a document list, the system displays the last updated version of the document in read-only mode. You can view the information that is displayed in the document and use the **More Actions** menu to perform non-edit actions such as print, export, view attachments, and so on. The document can no longer be updated when it is completed or canceled.

Field or Control	Description
In Progress	Displays the current state of the document. Informational. Valid values for each step include: Define Criteria (step): <i>In Progress</i> Checkpoint or Finalize Criteria (step): <i>In Progress</i> Evaluation (step): <i>Evaluation in Progress, Shared with Employee, Shared with Manager, Request Acknowledgment, Pending Acknowledgement, Acknowledged, Approval, Canceled, and Completed</i>. These values for the <i>Evaluation</i> step are also used as document statuses in document lists to organize and filter documents.

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Field or Control	Description
Preliminary Rating: Company Maker	Displays the preliminary rating that the manager assigned to the document on the Enter Preliminary Ratings Page, when the document is in the <i>Define Criteria</i>, <i>Track Progress</i>, or <i>Evaluation in Progress</i> status. The preliminary rating is also displayed in the header when the document is printed in one of these statuses. Note: Preliminary ratings are visible to managers only.
Overall Rating: Company Maker	Displays the overall rating of the document after it moves past the <i>Evaluation in Progress</i> status. When the overall rating becomes available, it is displayed on the document instead of the preliminary rating.
	Click to display the list of related actions that can be initiated for the employee.
	Click to expand or collapse the area that displays general information about the performance document, such as the document ID and type, associated template, and due date.
 or Save	Click to save the page.
	Click to add individuals to participate in the employee's performance review or manage participant evaluations on the Add/Review Participants Page. A visual cue (blue dot) indicates updates are available on the page. This action is available from the More Actions menu when viewed from a smartphone. This icon appears if the Nominate Participants option is selected on the Template Definition - General page. Note that if the Allow participant feedback at anytime option is not selected in the Nominate Participants section of the Template Definition - Process page, the icon is available only when the status of the document is changed to <i>Evaluation in Progress</i>. Note: Oracle recommends that you finalize all section items needed for the document before submitting participant nominations. Once a request is accepted, the system creates an evaluation document for the participant to provide feedback. Any subsequent item updates from the main document will not be reflected in participant evaluations already created.

Field or Control	Description
	Click to view the recognitions that the employee has received on the “View Recognitions Page” (Application Fundamentals). Note that if a recognition appears as new on the “View Recognitions Page” (Application Fundamentals), it will also be displayed as new when accessed from the Recognition or Team Recognition tile for the first time. This icon appears on the performance document in the <i>Evaluation in Progress</i> status if the Allow to View Recognitions option is selected on the Template Definition - Process Page. A blue dot appears if there are employee recognitions available for you to view.
	Click to view the list of actions that are applicable to the document and select an action to perform from the More Actions menu. The list of actions varies based on a few factors, such as the template setup, the current step of the document, and your user role. See Document-Level More Actions.

Understanding the More Actions menu

The **More Actions** menu appears in various locations on document pages to provide relevant user actions.

More actions are available as you work on different levels or areas of a document, for example:

- [Document-Level More Actions](#)
- [Step-Level More Actions](#)
- [Section-Level More Actions](#)
- [Item-Level More Actions](#)
- [More Actions for Participant Reviews](#)

Note: Actions from the **More Actions** menu are set up on the [Fluid Popup Menu Setup Page](#).

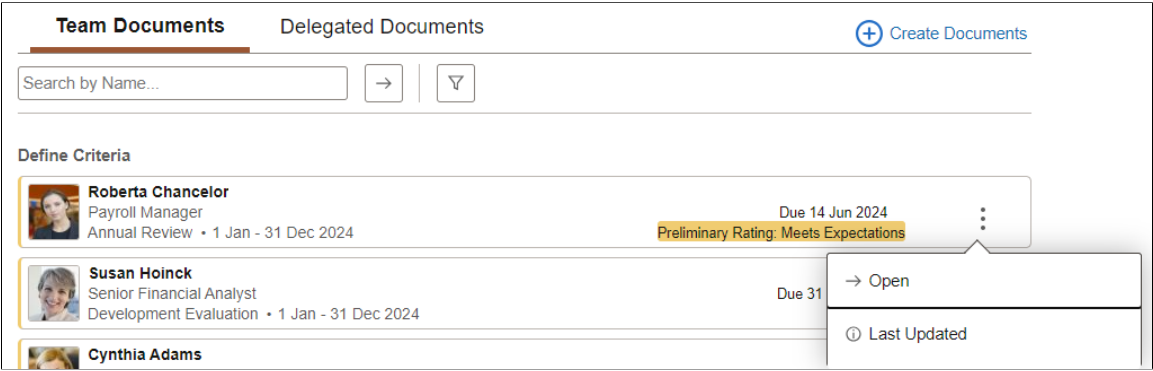
The two actions for creating sub-items (*Add Pre-defined* and *Add Your Own*), although not available from the **More Actions** menu, are also set up on the Fluid Popup Menu Setup page.

Document-Level More Actions

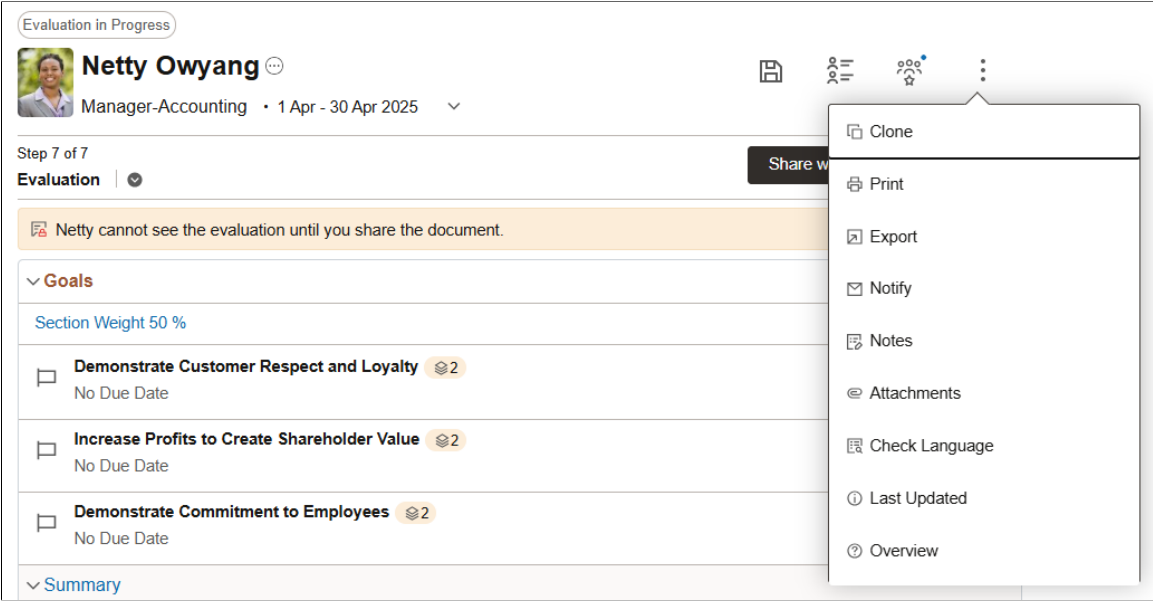
One or more of these actions are available when you click either:

- The **More Actions** menu of a document card, or
- The **More Actions** menu that appears in the header area of a document.

This screenshot shows an example of the More Actions menu for a document card.



This screenshot shows an example of the More Actions menu in the header area of a document. Not all supported actions are displayed in the menu.



Important! Note that the lists of actions available in the document card and document header menus are not identical.

Refer to this table for the list of delivered document-level actions:

Field or Control	Description
Open	Select to open the document on the Performance Document Page . It is the same as selecting the employee name of a document card.

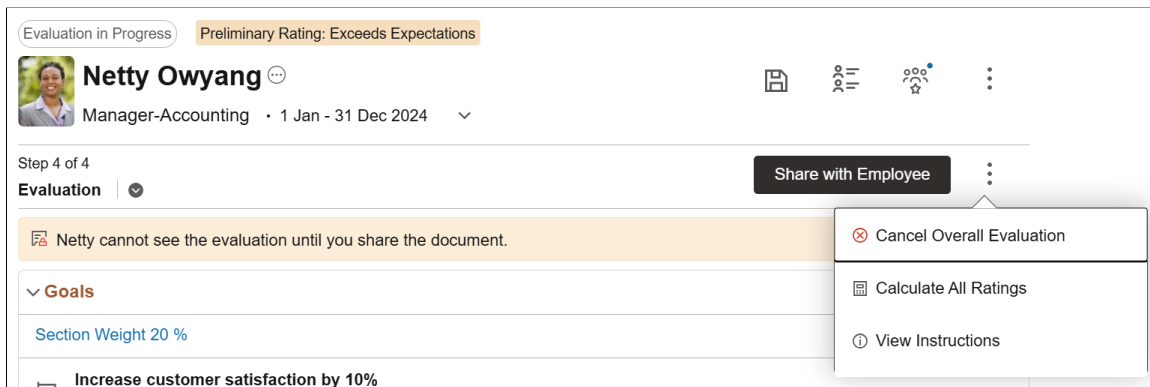
Field or Control	Description
Clone	Select to create a new document by cloning from the corresponding document with a new evaluation period that you specified. This action lets you create a new document quickly for the same employee, document type, and document template for the new evaluation period. This action appears if the option to allow cloning from existing documents is enabled for your role in the document type setup.
Print	Select to display a printable version of the document in the PDF format. Specify whether you want: Participant feedback (with participant identity) to be included. Or Participant feedback (without participant identity) to be included. Or Participant feedback to be excluded.
Export	Select to view and download the document in the rich text format (RTF). This action is available if the Allow Document Download option is selected for your role on the Template Definition - General Page.
Notify	Select to send a message about the document on the Notify Page.
Notes	Select to add notes to the document on the My Notes Page. This action is available if the Document Notes option is selected for your role on the Configure Performance Notes Page.
Rating History	(<i>Evaluation</i> step only) Select to view past performance ratings of the employee for the same document type on the Rating History Page. This action is available if the Rating History option is selected for your role on the Template Definition - General Page.

Field or Control	Description
360 Graphical Rating	(<i>Evaluation</i> step only) Select to view ratings provided by all evaluators as well as the calculated average rating for each section, item and sub-item of the evaluation on the 360 Graphical View Page. This action is available after the document is shared, if the View Average Rating option is selected for your role (manager, employee, or both) on the Template Definition - Process Page.
Attachments	Select to add attachments to the document on the Attachment Page. You can view but not add attachments in completed or canceled documents. This action is available, if the option to allow attachments for your role (manager, employee, or both) is selected on the Template Definition - Process Page. The system can be configured to support attachments in <i>Define Criteria</i>, <i>Checkpoint</i>, <i>Finalize Criteria</i>, and <i>Evaluation</i> steps.
Check Language	(Manager only) Select to check for inappropriate use of language in the comments of the manager's document on the Check Language Page. When inappropriate words are identified, the Language Checker tool suggests alternative words or phases that are more acceptable from an organization's perspective. This action is available if the Language Checker option is selected in the associated template on the Template Definition - General Page.
Last Updated	Select to view last updated information of the document on the Last Updated Page .
Overview	Select to view the description and objective of each step in the performance process on the Performance Process Overview Page .

Step-Level More Actions

One or more of these actions are available when you click the **More Actions** menu that appears at the step level on the [Performance Document Page](#), next to the primary action button.

This screenshot shows an example of the More Actions menu at the step level of a document. Not all supported actions are displayed in the menu.



The list of actions changes based on the current step (or document status).

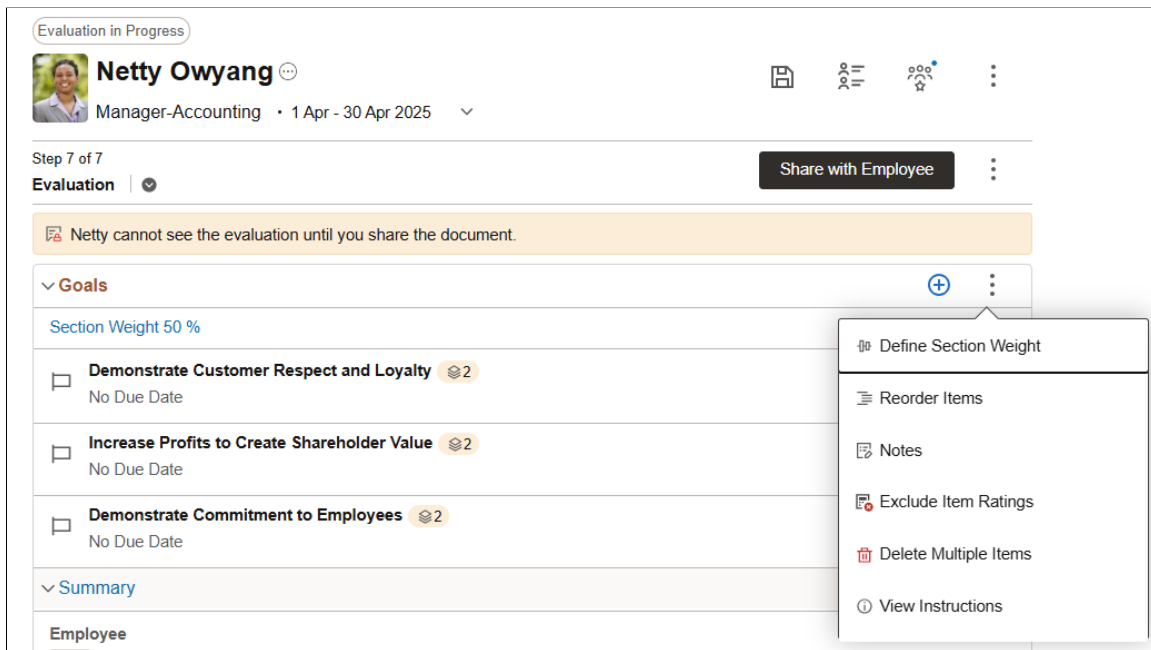
Field or Control	Description
Skip Checkpoint	(<i>Checkpoint</i> step only) Select to skip the current checkpoint step if it is no longer needed.
Reopen Prior Step	Select to reopen the previous step for update. The action is available if the previous step was just completed or skipped, and no changes have yet been made to the current step. This action is not available in the first step of the document.
View Employee Evaluation	(<i>Evaluation</i> step) Select to view the self-evaluation of the employee on the <u>Self-Evaluation - <Status> Page</u> (EP_MAIN_DOC_FL). This action is also available to the employee after the document is shared.
Reopen Employee Evaluation	(<i>Evaluation</i> step, manager only) Select to reopen the employee's self-evaluation that was completed, or canceled (by the manager or the system). This action updates the document status of the employee's self-evaluation to <i>Evaluation in Progress</i> .
Reopen Manager Evaluation	(<i>Evaluation</i> step, manager only) Select to reopen the manager document for update by changing the document status to <i>Evaluation in Progress</i> . This action appears after the document is shared. Also, a document cannot be reopened if it has been submitted for approval.

Field or Control	Description
Calculate All Ratings	(<i>Evaluation</i> step) Select to calculate all ratings in the document. Overridden ratings remain unchanged. Save the document after ratings are calculated. This action appears if the Calculate Ratings check box is selected on the Template Definition - Process Page.
Cancel Employee Evaluation	(<i>Evaluation</i> step, manager only) Select to cancel the employee's self-evaluation and update the document status to <i>Canceled</i>. This action appears when the employee's self-evaluation is in the <i>Evaluation in Progress</i> status.
Cancel Overall Evaluation	(<i>Evaluation</i> step, manager only) Select to cancel the entire evaluation and update the document status to <i>Canceled</i>.
Change Due Date	(<i>Evaluation</i> step, manager only) Select to modify the due date of the employee's self-evaluation that is currently in progress.
View Instructions	Select to view the instructions provided for the current document step, document usage, and user role on the Instructions Page. This action is available to all document steps. It appears when the View Instructions field is set to <i>Display in Modal Window</i> in the document's template definition. See Template Definition - General Page.

Section-Level More Actions

One or more of these actions are available when you click the **More Actions** menu at the section level of a document on the [Performance Document Page](#).

This screenshot shows an example of the More Actions menu at the section level of a document. Not all supported actions are displayed in the menu.



Field or Control	Description
Define Section Weight	Select to specify section weights for the document on the Section Weight page. See <Section or Item> Weight Page. This action is available if the section can be weighted based on the template setup.
Define Item Weight	Select to specify item weights for the section on the Item Weight page. See <Section or Item> Weight Page. This action is available if items in the section can be weighted based on the template setup.
Reorder Items	Select to change the order of items currently displayed in the document section by dragging and dropping items (or entering sequence numbers for items in screen reader mode) on the Reorder Items Page. This action is available if your role can either add or update items in the current step based on the template setup, and the section contains more than one item.

Field or Control	Description
Notes	Select to add notes to the section on the My Notes Page. This action can be available to all document sections. This action is available if the Section Notes option is selected for your role on the Configure Performance Notes Page.
Exclude Item Ratings	(<i>Evaluation</i> step only) Select to specify items or sub-items to be excluded from the document's overall rating calculation on the Exclude Item Ratings Page. This action is available if the Exclude Item Rating, Exclude Sub-Item Rating, or both options are selected for the <i>Manager</i> role in the Final Evaluation Step - Role Rules group box of the Template Definition - Structure Page, and there is more than one item in the section. See Understanding Exclusion of Items in Calculated Rating.
Delete Multiple Items	Select to remove one or more items from document sections on the <Section> Page (Delete Multiple Items). This action is available if your role can delete items in the current step based on the template setup.
Business Objectives	Select this action, if available, to view the default published business objective document identified for the employee on the Business Objectives Document page (EPO_MAIN_FL). This business objective document is used when adding business objectives as items in the performance document, and aligning items to business objectives. Typically it is the published business objective document of the employee's department (or position). If such document does not exist, the system climbs up one level at a time in the hierarchy until a published business objective document is found. If the department (or position) has an unpublished business objective document, the system displays a message stating that the default document is not published, and does not look for the next available published business objective document for the employee. This action is available if the section uses the <i>Business Objectives</i> special processing in the template setup.

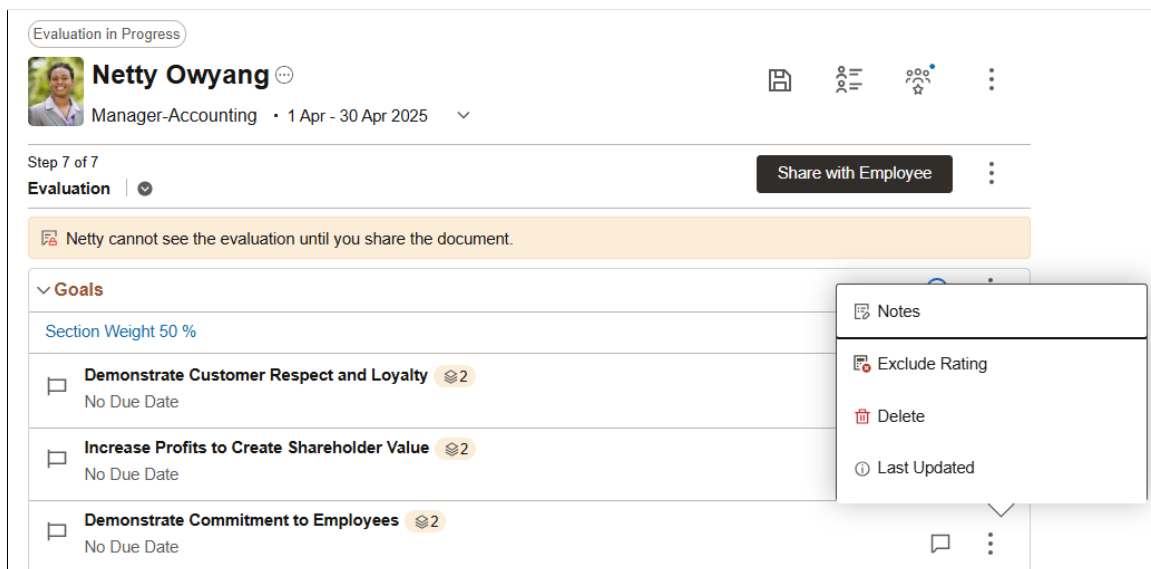
Field or Control	Description
View Instructions	Select to view the instructions provided for the document section on the Instructions Page. This action can be available to all document sections. It appears when the View Instructions field is set to <i>Display in Modal Window</i> in the document's template definition. See Template Definition - General Page. Note: The display of section-level instructional text is not supported in participant reviews.

Item-Level More Actions

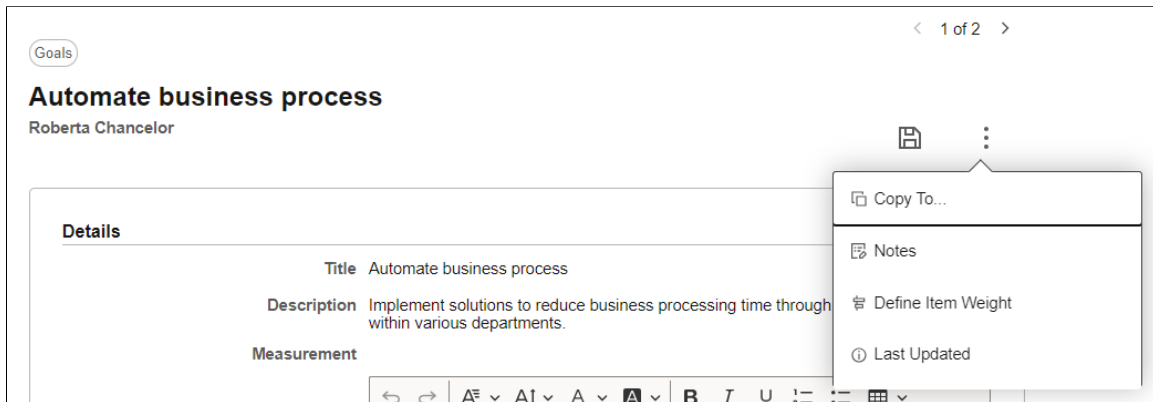
One or more of these actions are available when you click either:

- The **More Actions** menu of an item on the [Performance Document Page](#).
- The **More Actions** menu that appears in the header area of an item.

This screenshot shows an example of the More Actions menu at the item level of a document. Not all supported actions are displayed in the menu.



This screenshot shows an example of the More Actions menu in the header area of an item.



Important! Note that the action lists for the section item and item header menus are not identical.

Refer to this table for the list of delivered item-level actions:

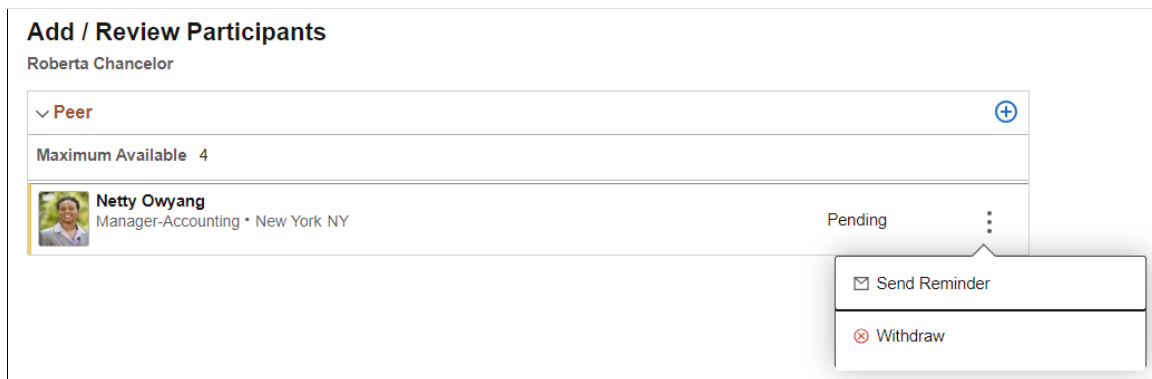
Field or Control	Description
Copy To	(Manager only) Select to copy the item to other employees' documents on the Copy to Other Documents Page. This action is available to documents in the <i>Define Criteria</i>, <i>Checkpoint</i>, or <i>Finalize Criteria</i> step only.
Notes	Select to add notes to the item on the My Notes Page. This action is available if the Item Notes option is selected for your role on the Configure Performance Notes Page.
Define Item Weight	Select to specify item weights for the section on the Item Weight page. See <Section or Item> Weight Page. This action is available if items in the section can be weighted based on the template setup.
View Graphical Rating	(<i>Evaluation</i> step only) Select to view the display of ratings provided by all users for the item in a horizontal bar chart on the Average Ratings Page. This action is available after the document is shared, if the View Average Rating check box is selected for your role on the Template Definition - Process Page.

Field or Control	Description
Exclude Rating	(<i>Evaluation</i> step only) Select to specify the item or its sub-items to be excluded from the document's overall rating calculation on the Exclude Rating Page. This action is available if the Exclude Item Rating, Exclude Sub-Item Rating, or both options are selected for the <i>Manager</i> role in the Final Evaluation Step - Role Rules group box of the Template Definition - Structure Page, and there is more than one item in the section. See Understanding Exclusion of Items in Calculated Rating.
Delete	Select to remove the corresponding item. This action is available if your role can delete items in the corresponding document step based on the template setup. This action is not applicable to items that were cascaded from business objective documents.
Last Updated	Select to view last updated information of the corresponding item on the Last Updated Page.

More Actions for Participant Reviews

One or more of these actions are available when you click the **More Actions** menu of a participant request or evaluation on the [Add/Review Participants Page](#).

This screenshot shows an example of the More Actions menu for a participant review.



Field or Control	Description
Cancel Evaluation	(Manager only) Select to cancel the participant evaluation. This action is available to <i>Accepted</i> requests, or participant evaluations that are <i>Evaluation in Progress</i>.

Field or Control	Description
Change Due Date	(Manager only) Select to update the due date of the participant evaluation. This action is available to <i>Accepted</i> requests, or participant evaluations that are <i>Evaluation in Progress</i> .
Delete Evaluation	(Manager only) Select to delete the canceled participant evaluation. This action is available to <i>Canceled</i> participant evaluations.
Reopen Evaluation	(Manager only) Select to reopen the participant evaluation. This action is available to <i>Completed</i> or <i>Canceled</i> participant evaluations.
Resubmit	Select to resubmit the participant request, which sets its status to <i>Pending</i> . This action is available to <i>Canceled</i> , <i>Withdrawn</i> , or <i>Declined</i> requests.
Send Reminder	Select to send an email reminder to the individual about a pending request. This action is available to <i>Pending</i> requests.
View Participant Evaluation	Select to view the evaluation completed by the participant on the Participant Evaluation page. This action is applicable to <i>Completed</i> participant evaluations for users whose role is specified in the View Evaluations field on the Template Definition - Process page. See Performance Document Page (Participant Evaluation) or Participant Evaluation Page .
Withdraw	Select to withdraw the request from the individual. This action is applicable to <i>Pending</i> requests.

Understanding Recognitions in Performance Documents

Recognition is an HR feature that enables users to provide kudos to acknowledge the achievements and accomplishments of individuals in the organization. Performance Management integrates with the Recognition feature to enable users to view and insert employee recognitions directly from performance documents in Fluid.

When the manager and employee provide feedback in various sections of the document during the evaluation phase, they can:

- Review recognitions that the employee received using the **View Recognitions** icon or link on the document.
- Add recognitions that the employee received to the document as reference. Added recognitions are displayed in the **Recognition Summary** section of the document.

Video: [Image Highlights, PeopleSoft HCM Update Image 50: Recognition Integration with Performance Management](#)

Recognition Visibility

The manager can add recognitions that are shared with them to team documents. The employee can add all recognitions they received to their self-evaluations.

After the employee's self-evaluation is completed, the manager can:

- View recognitions that the employee inserted by selecting *View Employee Evaluation* from the step-level **More Actions** menu.

When viewed from the self-evaluation, the manager can view *all* recognitions that the employee inserted, regardless of the privacy settings of the recognitions.

- View a combined list of recognitions inserted by both the manager and the employee in the **Recognition Summary** section of the document after it moves past the evaluation phase.

When viewed from the manager's document, the system lists only recognitions that the manager has permission to access. In other words, employee-only recognitions are not displayed for the manager.

Note: Privacy setting updates in recognitions are reflected dynamically in documents, which can alter what the manager is able to access after the updates. For example, if the employee restricts the visibility of a recognition from *Everyone* to *Employee*, the manager will no longer be able to view and add it from the “View Recognitions Page” (Application Fundamentals), or view it from the **Recognition Summary** section if it was previously added to the document. Similarly, if an employee-only recognition is now shared with everyone, the manager will be able to view and add it to the document.

Setting Up Recognitions to be Added and Displayed in Performance Documents

To enable employee-received recognitions to be added and displayed inline on performance documents:

1. Enable the **Allow to View Recognitions** option for managers, employees, or both on the [Template Definition - Process Page](#).
2. Add the **Recognition Summary** section type to the template definition on the [Template Definition - Structure Page](#). Include both *Manager* and *Employee* roles in the **Final Evaluation Step - Role Rules** group box.

The system delivers the **Recognition Summary** section definition to support the insertion and display of recognitions in performance documents.

When the manager or employee opens a document in the *Evaluation in Progress* status, the **Recognition Summary** section appears. From this section, they can add recognitions using the **View Recognitions** link, view posts that are added, or remove existing posts.

See [Performance Document Page \(Evaluation Step\)](#).

Understanding Exclusion of Items in Calculated Rating

During the evaluation phase, the manager and employee provide ratings and comments on the criteria on which the employee is being evaluated.

When some of these evaluation criteria (items) are no longer achievable by the employee in the current review period due to unforeseen circumstances (for example, global pandemic), the manager can exclude these items from rating calculation so that they do not negatively impact the overall performance rating of the employee. The effect of excluding items from rating calculation is essentially the same as setting the weight of items to zero percent, if the manager can weigh items.

Note: The ability to exclude items and sub-items from rating calculation, if enabled, is available to managers in the *Evaluation* step only. This functionality is *not* supported if the option to weigh items or override rating is enabled for the manager in the template setup.

To exclude items or sub-items from the rating calculation of the document:

1. Select *Exclude Item Ratings* from the **More Actions** menu of a document section. Or, select *Exclude Rating* from the **More Actions** menu of an item.

There must be at least two items in a section to exclude item ratings, or at least two sub-items in an item to exclude sub-item ratings.

2. On the [Exclude Item Ratings Page](#) or [Exclude Rating Page](#) that appears, select items and sub-items to be excluded from rating calculation.

Do not exclude all sub-items from an item, or items from a section.

Note: The system uses sub-item ratings to calculate their item rating, item ratings to calculate their section rating, and section ratings to calculate the overall rating of a document. Because it needs at least one input value for rating calculation, it does not allow the exclusion of all sub-items from its item rating calculation (or all items from its section rating calculation).

When the selection is completed, the system:

- Calculates all ratings in the document. To save the newly calculated ratings, select the **Save** button of the document.
- Displays the *Rating Excluded* text next to the rating display of each item that has been excluded on the [Performance Document Page \(Evaluation Step\)](#).

Note that the *Rating Excluded* text is displayed only for excluded items that have been rated. To view a complete list of items and sub-items that are excluded and their entered ratings, use the **View Excluded Ratings** link.

The manager can select the **View Excluded Ratings** link that appears at the footer of the corresponding section summary and the **Overall Summary** section to review the list of excluded items and sub-items for the document on the [Excluded Items Page](#). The link is also visible to the employee after the document is shared.

Text is displayed to remind the manager and employee that there are excluded items in a section (or excluded sub-items in an item) when they:

- Access the [Average Ratings Page](#) to view rating bar charts for items or sections.
- Access the [360 Graphical View Page](#) to view rating bar charts for all items and sections in the document.

- Print the document.
- Export the document.

Text: There are sub-items (or <sub-item label from template setup>) excluded from the Manager rating calculation.

The text for excluded items is displayed in their corresponding section summaries, not in the **Overall Summary** section.

Setting Up Exclusion of Items in Calculated Rating

To enable managers to exclude items or sub-items from the overall rating calculation of documents:

1. Select the **Allow Managers to Exclude Item Ratings from Calculation** option on the Template Definition - General Page.
2. For each document section where this functionality will be supported, select the **Exclude Item Rating**, **Exclude Sub-Item Rating**, or both options for the *Manager* role in the **Final Evaluation Step - Role Rules** group box of the Template Definition - Structure Page.

Note: Both the **Weight** option in the **Items** group box and the **Override Rating** option for the *Manager* role must be cleared for the exclude rating options to be available for selection.

Performance Document Page

Use the Performance Document page (EP_MAIN_DOC_B_FL or EP_MAIN_DOC_FL) to update documents in various steps of the review process.

Navigation:

- Click the employee name link of a document on a document list.
- Select *Open* from the **More Actions** menu of a document on a document list.

See Also (Fluid) Working With ePerformance Document Lists.

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

Performance Document

In Progress

Preliminary Rating: Meets Expectations



John Patterson

Manager-Revenue • 1 Jan - 31 Dec 2024



Instructions

1. Review the performance criteria (goals and/or responsibilities) that the employee plans to accomplish during the performance period.

2. Once the performance criteria are correct, select the **Complete** button (if available) to complete the step or **Save** button to save your changes. Optionally, select **Notify** from the **More Actions** menu at the document header level to email your employee.

Step 1 of 4

Define Criteria

Complete



Document Errors

Rerun Error Check

 Errors Found. Fix the issues listed and try again.

1 Rows

Please adjust the Competencies section's item weighting by 100%, so that item weights add up to 100%.



Goals



Review the goals that the employee plans to accomplish during the performance period.

Section Weight 0 % • Evaluated by Employee, Manager, Peer

 Promote Business Growth

 0

No Due Date • Weight 50%



 Produce High Quality Financial Reports

 0

No Due Date • Weight 50%



This example illustrates the fields and controls on the Performance Document page for the smartphone.

Performance Document

Save More

In Progress

Preliminary Rating: Meets Expectations

John Patterson
Manager-Revenue
1 Jan - 31 Dec 2024

> **Instructions**

Step 1 of 4
Define Criteria

Document Errors

Errors Found. Fix the issues listed and try again.
1 Rows [Rerun Error Check](#)

Please adjust the Competencies section's item weighting by 100%, so that item weights add up to 100%.

Goals

Review the goals that the employee plans to accomplish during the performance period.

Section Weight 0 %
Evaluated by Employee, Manager, Peer

Promote Business Growth 0
No Due Date
Weight 50%

Complete

Instructions

This section displays user instructions for the current document step. Instructions are text catalog entries. The content can be different based on the document usage, the role of the logged-in user, and the current document step.

It appears when the **View Instructions** field is set to *Display on Document Page* in the document's template definition.

See [Template Definition - General Page](#).

Video: [Image Highlights, PeopleSoft HCM Update Image 50: Display Instructional Text on Performance Document](#)

Video: [Image Highlights, PeopleSoft HCM Update Image 51: Instructional Text for Documents at the Section and Step Level in ePerformance](#)

Step Information and Actions

Field or Control	Description
Step 1 of 4 Define Criteria 	Displays the step of the review process that the document is currently in. Select the icon to expand the popup menu and view the overall progress of the document in the review process. The popup menu displays the list of steps (and due dates) that are available in the review process, based on the associated template. The steps shown may or may not be entirely applicable to the user who is viewing the list. The list provides a quick update of where you are in the review process. It shows the current step (name appears in bold font), previous steps that were done (<i>Completed</i> or <i>Skipped</i>), and remaining steps to be worked on (<i>Not Started</i>). You can select a previous step to view the last-updated and read-only version of the document in that step. Some actions are still available for you to drill down and view the content of the document, such as item details, ratings and comments, and notes. However, you can no longer edit the document.

Field or Control	Description
	Use the button to perform the primary action. The system performs validations on the page when you click the action button. The action button varies for users based on a number of factors, such as the step that the document is in and your role privileges specified in the template setup for that step. For example, if your role is configured to complete the <i>Define Criteria</i> step in the template setup, the Complete button appears when you open a document in that step. Sometimes an action button appears in white with colored border, which represents a secondary action in the step. For example, when it is time for the employee to acknowledge their document after the discussion with the manager, the system displays the Acknowledge button as a colored action button for the employee, and the Override Acknowledgement button as a white action button with colored border for the manager. It means that while the manager has the option to override the acknowledgement if needed, the primary action is for the employee to provide the acknowledgement.
	Click to view the list of actions that are applicable to the current step and select an action to perform. The list of actions varies based on a few factors, such as the template setup, the current step of the document, and your user role. See Step-Level More Actions.

Document Errors

After you have selected the action button on the document page, this section appears if errors are found by the validation check performed for the current document step. It displays error messages that need to be addressed before proceeding to the next action. Some of the step-specific errors include:

- Document is not shared with the employee or the manager.
- Section weightings are required but not specified.
- Item weightings are required but not specified.
- Section, item, or sub-item ratings are required but not entered.
- Section or item comments are required but not entered.
- Minimum comment length is not met.

Field or Control	Description
Run Error Check or Rerun Error Check	Select to run validation checks on the document. Select an error row and fill out the requested information on the modal page that appears. After updating and closing the modal page, the validation runs automatically and removes the fixed row or rows from the list. Note: When you fix the reported errors by updating the document directly rather than going through the modal pages from the list, the validation does not occur automatically. In this case, use the Rerun Error Check button or the action button to validate the document manually.

<Section Name>

A section is a grouping of similar items, which represent criteria that are used to evaluate the employee. The template setup controls the list and order of sections that are available in documents, and what you can do in each of them. The section name is also configurable in the template.

Instructional text for the section (if available) appears below the section name if the **View Instructions** field is set to *Display on Document Page* in the template definition.

The display of section-level instructional text is not supported in participant reviews.

Video: [Image Highlights, PeopleSoft HCM Update Image 51: Instructional Text for Documents at the Section and Step Level in ePerformance](#)

For any section where review ratings and comments are expected, you can:

- View the list of user roles that can provide feedback for items in the section.
- View a list of items already added to the section based on the template setup. In addition to adding items manually, the administrator can set up templates to preload items (for example, competencies) to newly created documents from profile content on the [Template Definition - Content Page](#).

Based on template setup, you may also see information displayed for items if it is available, such as due date, weight, and rating description.

- Add, edit, and delete items, as configured in the template setup for your role.
- Perform section-level actions.

Note: Some delivered sections do not have items. These sections serve specific purposes, such as displaying career information from an integration, letting the employee or manager enter overall feedback for the evaluation, and signing the document. They are associated with special processing in their section definitions.

Refer to these topics for more information about document sections in different steps of the review process.

[Performance Document Page \(Define Criteria Step\)](#)

[Performance Document Page \(Checkpoint or Finalize Criteria Step\)](#)

[Performance Document Page \(Evaluation Step\)](#)

Select/Create Items Page

Use the Select/Create Items page (EP_ADD_ITEM_SCF) to add items to document sections.

Navigation:

Click the **Add Item** icon on the [Performance Document Page](#).

This example illustrates the fields and controls that are available in the header area of the Select/Create Items page.

The screenshot shows the 'Select / Create Items' page for 'Employee Goals'. The page has a header bar with 'Cancel' and 'Done' buttons. Below the header, the title 'Select / Create Items' is displayed, followed by the user name 'Rosanna Channing'. A tabbed interface is present with five tabs: 'Pre-defined' (selected), 'Your Own', 'Business Objectives', 'My Document', and 'Team Document'. Below the tabs, there is a search section with a 'Search' button and a 'Clear' button. The search criteria include a 'Title' field with the placeholder 'Search', a 'Content Group Type' dropdown menu, and a 'Content Group' dropdown menu. At the bottom of the search section, there is a message: 'Search Employee Goals. You can enter search criteria to help refine your results.'

This example illustrates the fields and controls of the Select/Create Items page for the smartphone.

Add Goals

Select / Create Items

Rosanna Channing

*Category

Pre-defined ▼

My Document

Pre-defined

Team Document

Your Own

Search Clear

Search Goals

You can enter search criteria to help refine your results.

0

Select/Create Items Page Header

The name of the section appears as the title of the banner.

Field or Control	Description
Done	Click this button to insert items (which are currently selected on the list) to the document section on the Performance Document Page .
Cancel	Click this button to discard changes on the current page and return to the Performance Document Page .
	Displays the count of items that are temporarily added to the list. When you add or remove an item, the system updates the item count and items in the list automatically. Click to view or remove items from the list on the <Section Name> in List Page .
Pre-defined	Click to access the Select/Create Items - Pre-defined Page .
Your Own	Click to access the Select/Create Items - Your Own Page .
Business Objectives	Click to access the Select/Create Items - Business Objectives Page .
My Document	Click to access the Select/Create Items - My Document Page .
Team Document	(Manager only) Click to access the Select/Create Items - Team Document Page .
Manager Document	(Employee only) Click to access the Select/Create Items - Manager Document Page .

Select/Create Items - Pre-defined Page

Use the Select/Create Items - Pre-defined page (EP_ADD_ITEM_SCF) to add pre-defined items to document sections.

Navigation:

Click the **Pre-defined** tab on the [Select/Create Items Page](#).

This example illustrates the fields and controls on the Select/Create Items - Pre-defined page.

Cancel

Employee Goals

Done

Select / Create Items

Rosanna Channing

Pre-defined

Your Own

Business Objectives

My Document

Team Document

▼ Search

Title

Search

Content Group Type

Corporate Objectives Groups

Content Group

Customer Loyalty

Search

Clear

Select All

Deselect All

1 rows

☐

Demonstrate Customer Respect and Loyalty
Corporate Objectives Groups / Customer Loyalty

ⓘ

The **Pre-defined** tab is available if the **Enable Items** option is selected and your role can add items to the section in the current step based on the template setup.

Field or Control	Description
Title	Enter keywords to look up predefined items by item title. Select one or more items in the search results to add to the list.
Content Group Type and Content Group	Filter items by content group type and content group. These fields are available in any document section that is associated with a content type in the template and that content type is set up with one or more content group types and content groups. An example is the Competencies section. See Also “Content Group Types Page” (PeopleSoft Human Resources Manage Profiles).
	Click to view additional information of the item on the Details Page .

Select/Create Items - Your Own Page

Use the Select/Create Items - Your Own page (EP_ADD_ITEM_SCF) to add items that you create manually to document sections.

Navigation:

Click the **Your Own** tab on the [Select/Create Items Page](#).

This example illustrates the fields and controls on the Select/Create Items - Your Own page.

Cancel

Employee Goals

Done

* Indicates required field

0

Select / Create Items

Rosanna Channing

Pre-defined

Your Own

Business Objectives

My Document

Team Document

You can add multiple custom items and they will be temporarily added to the list. Browse the list to remove the added items. You can edit custom items after saving in the document.

Details

*Title

Font

Size

B

I

U

Description

In addition to items that already exist in the system, you have the option to add your own items to document sections as well.

The **Your Own** tab is available if the **Free Form Allowed** option is selected and your role can add items to the section in the current step based on the template setup. Use the item setup in the template (the **Items** section on the Template Definition -Structure page) to select the fields to appear on this page for you to enter information about the item.

Field or Control	Description
Add to List	Click this button to save the item you created temporarily to the list. The system then clears the page for you to enter a new item.
Clear	Click this button to delete content from the page and enter new item information.

Select/Create Items - Business Objectives Page

Use the Select/Create Items - Business Objectives page (EP_ADD_ITEM_SCF) to add items from business objectives to document sections.

Navigation:

Click the **Business Objectives** tab on the Select/Create Items Page.

This example illustrates the fields and controls on the Select/Create Items - Business Objectives page.

Cancel

Employee Goals

Done

Select / Create Items

Rosanna Channing

Pre-defined

Your Own

Business Objectives

My Document

Team Document

Business Objectives

2016 Business Objectives Finance and Administration

Select All

Deselect All

6 rows

☐

Demonstrate Customer Respect and Loyalty
Customer Loyalty

ⓘ

☐

Ensure Customer Satisfaction
Customer Loyalty

ⓘ

☐

Increase Profits to Create Shareholder Value
Profitability

ⓘ

☐

Provide Accurate and timely Financial reports
Profitability

ⓘ

The **Business Objectives** tab is available if the **Copy Objective Items** option is selected for your role in the current step based on the template setup.

You can add business objectives that are owned by your manager to documents as items. Select applicable business objectives to add to the list.

Field or Control	Description
	Click to view additional information of the item on the Details Page .

Select/Create Items - Manager Document Page

(Employee only) Use the Select/Create Items - Manager Document page (EP_ADD_ITEM_SCF) to add items from your manager's documents to document sections.

Navigation:

Click the **Manager Document** tab on the [Select/Create Items Page](#).

This example illustrates the fields and controls on the Select/Create Items - Manager Document page.

Competencies

Select / Create Items
Rosanna Channing

Pre-defined **Manager Document** My Document

Select All Deselect All 3 rows

☐	Abstract thinking	①
☐	Takes initiative & follows up	①
☐	Resource Planning	①

Note: This page is applicable to the employee only.

The **Manager Document** tab is available if the **Copy Manager's Items** option is selected for your role as the employee in the current step based on the template setup.

Select/Create Items - My Document Page

Use the Select/Create Items - My Document page (EP_ADD_ITEM_SCF) to add items from the manager's or employee's own documents to document sections.

Navigation:

Click the **My Document** tab on the [Select/Create Items Page](#).

This example illustrates the fields and controls on the Select/Create Items - My Document page.

Goals

Select / Create Items
Rosanna Channing

Pre-defined Your Own Manager Document **My Document**

▼ Search

Document Type Document Status
Track Progress

Period Between [] - [] Search Clear

✓ Annual Review
1 Jan - 31 Dec 2014
Track Progress - Checkpoint 1

Select All Deselect All 4 rows

☐	Manager Corporate Cash Flow	①
☐	Monitor Corporate Spending Monthly	①
☐	Manage Accounting Projects	①
☐	Follow Corporate Ethics and Standards	①

(For manager) The **My Document** tab is available if the **Copy Manager's Items** option is selected for your role as the manager in the current step based on the template setup. This page lists, from your own evaluations, items that match the criteria of the employee's document.

(For employee) The **My Document** tab is available if the **Copy from Another Document** option is selected for your role as the employee in the current step based on the template setup. This page lists, from your own evaluations, items that match the criteria of your self-evaluation.

Select applicable items to add to the list. Click the **Done** button when finished.

See Also <Section Name> in List Page.

Field or Control	Description
Document Type, Document Status, and Period Between	Use these fields, if available, to search for your own documents from which you want to copy items.
Search and Clear	Use the Search button to perform the search, and the Clear button to reset the page to blank.
<Documents on left panel>	Select a document from which items are copied. When selected, the Search section collapses automatically. The selected document is indicated with a check mark.
<Items on the right panel>	Displays items of the selected document. Select applicable items to add to the list. When you select an item from a document, the system updates the number count of the Selected List icon and preselects the same item that is also available in other documents on the left panel automatically. Updates in these two places occur when you deselect an item from the document as well. See Also <Section Name> in List Page.
	Click to view additional information of the item on the Details Page .

Select/Create Items - Team Document Page

(Manager only) Use the Select/Create Items - Team Document page (EP_ADD_ITEM_SCF) to add items from your team's documents to document sections.

Navigation:

Click the **Team Document** tab on the [Select/Create Items Page](#).

This example illustrates the fields and controls on the Select/Create Items - Team Document page.

Cancel

Goals

Done

Select / Create Items

Rosanna Channing

Pre-defined

Your Own

My Document

Team Document

▼ Search

First Name

Last Name

Document Type

Document Status

Evaluation in Progress

Period Between

Search

Clear

Rosanna Channing

Annual Review

1 Oct 2022 - 30 Sep 2023

Evaluation in Progress

✓

David Ho

Annual Review

1 Jan - 2 Jan 2022

Evaluation in Progress

Select All

Deselect All

2 rows

☐

Communicate quarterly alliance results

☐

Automate business process

Note: This page is applicable to the manager only.

The **Team Document** tab is available if the **Copy from Another Document** option is selected for your role as the manager in the current step based on the template setup.

Field or Control	Description
First Name, Last Name, Document Type, Document Status, and Period Between	Use these fields to search for team members' documents from which you want to copy items. Leave these fields blank to see all documents that has you listed as the manager in the search results. These fields are displayed when you access the Team Document tab for the first time.
Search and Clear	Use the Search button to perform the search, and the Clear button to reset the page to blank.
<Documents on left panel>	Select a team member's document from which items are copied. When selected, the Search section collapses automatically. The selected document is indicated with a check mark.

468

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<i>Field or Control</i>	<i>Description</i>
<Items on the right panel>	Displays items of the selected document. Select applicable items to add to the list. When you select an item from a document, the system updates the number count of the Selected List icon and preselects the same item that is also available in other documents on the left panel automatically. Updates in these two places occur when you deselect an item from the document as well. See Also <Section Name> in List Page.
	Click to view additional information of the item on the Details Page .

<Section Name> in List Page

Use the <Section Name> in List page (EP_MAIN_ADDITM_SCF) to view or remove items from the document section.

Navigation:

Click the **Selected List** icon on the [Select/Create Items Page](#).

This example illustrates the fields and controls on the <Section Name> in List page.

Competencies in List		
Accountability for decisions	Pre-defined	
Abstract thinking	My Document	
		 Remove All

Each row displays the item title and item type.

(Applicable to pre-defined items) If you have added an item to the list from the search results, the item will not show up in future search results even it is a match.

You can delete items (individually or in bulk) from the list. Deleted items will be available again in their corresponding item pages (Pre-defined, Business Objectives, My Document, Team Document, and Manager Document) except for Your Own items, which will be discarded.

Details Page

Use the Details page (EP MAIN OINFO SCF) to view additional information of the item.

Navigation:

Click the **Information** icon next to an item.

This example illustrates the fields and controls on the Details page.

Details



Competencies

Abstract thinking

Description
Able to analyze multi-faceted concepts determining a sound solution. Able to think "out-of-the-box". Uses innovative solutions to solve problems.

Measurement
No Measurement

 [See More](#)

Click the **See More** link to view more details about the item.

Performance Document Item Page

Use the Performance Document Item page (EP_MAIN_B_ITMED_FL) to view or update item details.

Navigation:

Click an item title link on the [Performance Document Page](#).

This example illustrates the fields and controls on the Performance Document Item page (1 of 5). Edit item details as needed and manage sub-items (if enabled in the template setup).

Performance Document Item
< 1 of 3 >

Goals

Develop New Business Relationships

Rosanna Channing • 2 Goals and Objectives

📁
⋮

Details

Title Develop New Business Relationships

Description Develop new business relationships and maintain and nurture existing relationships.

Measurement

↩
↪
A²
AI
A
A
B
I
U
1=
:=
📅

Employee Measurement

Level of Difficulty

Supports Goal ▼

This example illustrates the fields and controls on the Performance Document Item page (2 of 5).

Dates

Due Date MM/DD/YYYY 📅

Reminder Date MM/DD/YYYY 📅

Start Date MM/DD/YYYY 📅

End Date MM/DD/YYYY 📅

Attributes

Target Rating ▼ ?

Status ▼

Percent Complete

Critical ☐

Stretch Goal ☐

Exclude Rating from Calculation ☐

This example illustrates the fields and controls on the Performance Document Item page (3 of 5).

Goals and Objectives

Add

Custom

*Title

Identify new customers

Exclude Rating from Calculation

Employee

Rosanna Channing

Participant

[View Participant Ratings](#)

Manager

Betty Locherty

☆☆☆☆☆ Your rating is mandatory.

This example illustrates the fields and controls on the Performance Document Item page (4 of 5).

Evaluation	
Employee	
	Rosanna Channing
	Employee has not completed their self-evaluation
Participant	
	Netty Owyang
	Exceeds Expectations
	Rosana exceeded expectation of Develop New Business Relationships .
	Cynthia Adams
	Meets Expectations
	Rosanna met the expectation of the Develop New Business Relationships goal.

This example illustrates the fields and controls on the Performance Document Item page (5 of 5).

Manager



Betty Locherty

☆☆☆☆☆

Your rating is mandatory.

Calculate

?

↶

↷

A[°]

A₁

A₂

A₃

B

I

U

≡

≡

☰

Writing Tools

Comments are required with a minimum of 10 characters.

Rosanna cannot see your evaluation

View Prior Steps Evaluation

This example illustrates the fields and controls on the Performance Document Item page for the smartphone.

Performance Document Item

Save More

< 2 of 2 >

Competencies

Project Management
Rosanna Channing • 1 Related Competencies

Details

Title
Project Management

Description

Measurement

Employee Measurement

↶ ↷ | A² ▼ AI ▼ A ▼ A ▼

B *I* U = = = |

This page displays editable fields of the selected item, such as description, due date, target rating and other information that is configured to display in the document based on the template setup.

The field descriptions in items are the same between Classic ePerformance and Fluid ePerformance.

Refer to this Classic ePerformance topic for more information: [<Manager or Self-> Evaluation Page, Section #- <section name>](#).

Refer to the [Defining Sections](#) topic for a list of fields that can be available in item details from the setup perspective.

Field or Control	Description
	Displays the section to which the item belongs.
 and 	Use these controls to access previous and next items in the section.
	Click to save the item. If you update an item and leave the page without saving, changes remain on the item page when you return.
	Click to view the list of actions that are applicable to the item and select an action to perform. The list of actions varies based on a few factors, such as the template setup, the current step of the document, and your user role. See Item-Level More Actions.
	Click to view rating descriptions of the associated rating model. This icon is available near a rating display. See Rating Model Page.
	Click to view the alignment of the item to the objective to which it aligns on the Alignment Chain Page. This icon is applicable to items created from business objectives. It appears after you select an objective from the Align To field.
Exclude Rating from Calculation	Use this toggle switch to exclude the rating of the corresponding item from its section rating calculation, which can impact the overall rating calculation of the document. This field is available in the <i>Evaluation</i> step to the manager who is given the access to exclude items from rating calculation in the template setup.

Sub-Items

The **Sub-Items** section appears if sub-items are enabled in the section based on the template setup.

The term *sub-item* can be renamed in the template setup as needed.

Field or Control	Description
Add	Click this link to add sub-items of your choice to the item. Select: <i>Add Pre-defined</i> to add preset sub-items on the Sub-Items Page. <i>Add Your Own</i> to enter the title and brief description of your custom sub-item in the fields that appear on the page. To add another custom sub-item, click the Add link again. Save the added sub-items before leaving the item page. The Add link and options are available if sub-items are enabled and (for <i>Add Your Own</i> only) free-form sub-items are allowed in the section in the template setup.
Custom or Pre-defined	This label identifies the type of the sub-item shown. (<i>Evaluation</i> step and manager only) The system displays sub-item ratings from other users if the information is available.
Exclude Rating from Calculation	Select to exclude the rating of the corresponding sub-item from its item rating calculation, which can impact the overall rating calculation of the document. This field is available in the <i>Evaluation</i> step to the manager who is given the access to exclude sub-items from rating calculation in the template setup.
View Participant Ratings or Participant Ratings	(Manager only) Click to view the ratings provided by participants for the sub-item on the Participant Ratings page (EP_APPR_SUB_FB_FL).
<Rating display>	Use the star or drop-down box rating display to provide rating. The corresponding rating description is displayed. This rating display appears if your user role can rate sub-items in the current step based on the template setup.
	Click to view rating descriptions of the associated rating model. This icon is available near a rating display.

Evaluation

Use the **Evaluation** section to enter feedback or view feedback that is provided by other users about the item directly from the item page. It appears if your role has the permission to do so based on the template setup.

This section provides another way for you to enter item feedback, in addition to using the [Quick Evaluation Page](#).

The layout of this section is almost identical to the layout of the section summary.

Field or Control	Description
<Rating display>	Use the star or drop-down box rating display to provide rating. The corresponding rating description is displayed. (<i>Evaluation</i> step only) The system displays both the rating description and the corresponding numeric rating (or rating points, based on the selected calculation method) when a rating is selected. This rating display appears if your user role can rate items in the current step based on the template setup. Note: (<i>Evaluation</i> step only) If the Calculate Ratings option is enabled in the template setup but you do not have the permission to override ratings, you cannot update the system-calculated rating directly from the display. To change a system-calculated rating in this scenario, you need to modify the ratings that are used to derive that system-calculated rating. For example, to change a section summary rating, modify one or more of its item ratings.

Field or Control	Description
 or Calculate	Click for the system to perform roll-up calculation on the rating for the corresponding: • Item, in which all of its sub-items that have ratings are considered in the calculation. Or • Section summary, in which all of its items, with or without ratings, are considered in the calculation. Or • Overall summary, in which all rate-enabled section summaries, with or without ratings, are considered in the calculation. Sections that cannot be rated are excluded from the calculation. The system performs rating calculations when you save the page as well. This icon is applicable to the <i>Evaluation</i> step only. This icon appears if the Calculate Ratings check box is selected on the Template Definition - Process Page. The <i>Rating Calculated</i> text is shown near the rating display to indicate that the displayed rating is system-calculated. Ratings can be overridden if this option is enabled for your role in the template setup. If you override a system-calculated rating by selecting a different value in the rating display, the <i>Rating Overridden</i> text is displayed. Click the Calculate Rating icon again if you want to replace the existing rating with a system-calculated value.
	Click to view rating descriptions of the associated rating model. This icon is available near a rating display. See Rating Model Page.

Field or Control	Description
<Comment field>	Enter your comment. This field appears if your user role can provide comments based on template setup. Rich text editor (RTE) support for comments and other long fields can be enabled for Fluid ePerformance on the ePerformance Installation - ePerformance Page. The RTE option is available to PeopleTools 8.59 and higher. (<i>Evaluation</i> step only) The minimum character count information is displayed, if comment is required for the current step and a minimum character count is specified in the template setup.
Writing Tools	(<i>Evaluation</i> step only) Click to choose suggested texts as review comments from Writing Tools. See Writing Suggestions - All Page. This link appears below the comment field if one or more Writing Tools options are selected for your role on the Template Definition - Process Page.
View Prior Steps Evaluation	Click to view the feedback that you entered in previous document steps for the section on the Prior Steps Evaluation page (EP_PRIOR_STEPS_SCF). This link appears if the document contains <i>Checkpoint</i> and <i>Finalize Criteria</i> steps and you have finished at least one of them.

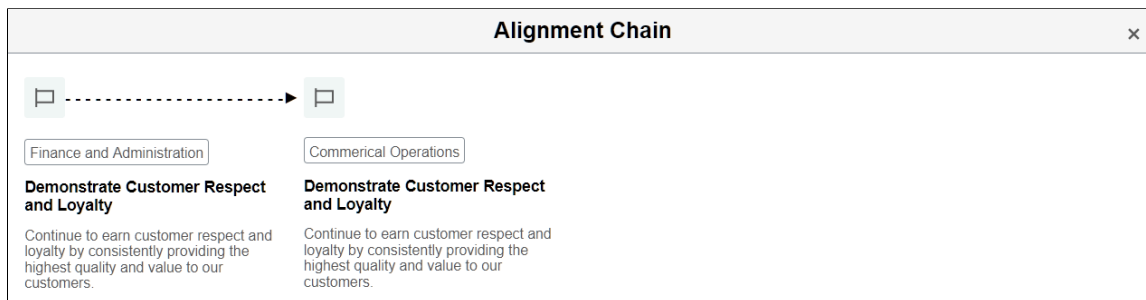
Alignment Chain Page

Use the Alignment Chain modal page (EPO_ALIGN_CHN_SCF) to view the alignment of the current business objective item with its corporate or departmental objectives in the organization.

Navigation:

Click the **Alignment Chain** icon of a business objective item on the Performance Document Item page.

This example illustrates the fields and controls on the Alignment Chain page.



Sub-Items Page

Use the Sub-Items page (EP_MAIN_ADDSUB_SCF) to add pre-defined sub-items to items.

Navigation:

Click the **Add** link and then *Add Pre-defined* on the Performance Document Item Page.

This example illustrates the fields and controls on the Sub-Items page.

The screenshot shows a window titled "Sub-Items" with "Cancel" and "Done" buttons. Below the title bar is a search bar labeled "Title" with the placeholder text "Search sub-items" and a right arrow button. Below the search bar is a list of five sub-items, each with a checkbox and a description:

- ☐ Performs highly accurate, quality technical work
- ☐ Has a deep knowledge of their functional area
- ☐ Keeps knowledge up to date
- ☐ Is seen as a technical expert
- ☐ Is accessed for technical expertise

Search and select sub-items for the associated item. The page title is configurable in the template setup.

You can add from the list that is displayed, or look up and add sub-items by title. Added sub-items will no longer show on this list.

My Notes Page

Use the My Notes page (EP_MAIN_NOTES_SCF) to add, update or delete notes.

Navigation:

- Click the **Performance Notes** icon of an item on the Performance Document Page.
- Select *Notes* from the **More Actions** menu of a document, a section, or an item.

This example illustrates the fields and controls on the My Notes page that is viewed at the document level.

Cancel

My Notes

Save

From

MM/DD/YYYY

To

MM/DD/YYYY

→

Document Notes

+

Add Note

Recognition

Received recognition from SVP for the Apex project

Created

12 Mar 2025 1:49 PM

Section

Document Level

Quarterly check-in

Daryl planned to take project mgt training next quarter

Created

12 Mar 2025 1:29 PM

Section

Goals

Exceptional customer sat score

Received 90% customer sat score on average.

Created

12 Mar 2025 1:48 PM

Section / Item

Goals / Increase customer satisfaction by 10%

This example illustrates the fields and controls on the My Notes page that is viewed at the section level.

My Notes

From To →

Goals + Add Note

Quarterly check-in ✎ 🗑

Daryl planned to take project mgt training next quarter

Created 12 Mar 2025 1:29 PM
Section Goals

Exceptional customer sat score ✎ 🗑

Received 90% customer sat score on average.

Created 12 Mar 2025 1:48 PM
Item Increase customer satisfaction by 10%

This example illustrates the fields and controls on the My Notes page that is viewed at the item level.

My Notes

From To →

Goals + Add Note

Increase customer satisfaction by 10%

Exceptional customer sat score ✎ 🗑

Received 90% customer sat score on average.

Created 12 Mar 2025 1:48 PM

Note: Notes are only visible to the users who added them or to whom the notes were transferred.

Notes can be inserted at the document, section, and item levels based on setup on the [Configure Performance Notes Page](#).

When accessing the My Notes page at the:

- Document level, all notes for the document, its sections and items are displayed.

Each note is tagged with the name of the section or item for which they were created. For those that were created for the document generally, they are *Document Level* notes.

- Section level, all notes for the section and its items are displayed.
- Item level, all notes for the item are displayed,

Note: When an item is deleted, notes of the deleted item remains visible on the My Notes page in the document-level and section-level views, as well as on the [Performance Notes Page](#) or [My Performance Notes Page \(Note List\)](#) for the note owner.

See Also [Understanding Fluid Performance Notes](#).

Field or Control	Description
From and To	Specify a date period to refine the search for notes you added.
Document Notes , <Section name>, or <Section and item names>	Displays: • Document Notes, which indicates that you are managing notes for the document, its sections and items, or • The section name, which indicates that you are managing notes for that section and its items, or • Section and item names, which indicate that you are managing notes for that item.
Add Note	Select to enter the subject and text for a new note on the Add Note page (EP_MAIN_ADNOTE_SCF). A new note is not editable until it is saved. A note is not saved until you select the Save button on the My Notes page. This link is controlled by the Performance Notes configuration. For more information, refer to the configuration examples in the Setting Up Fluid Performance Notes topic.
	Click to open an existing note for update on the Edit Note page (EP_MAIN_ADNOTE_SCF).
	Click to delete the note. If the Retain Deleted Notes option is selected in the configuration, the deleted note is visible as historical note on the Performance Notes Page or My Performance Notes Page (Note List) for the note owner, with the word <i>[Deleted]</i> on the note subject. If the option is cleared, the deleted note is no longer visible on any page.

Quick Evaluation Page

Use the Quick Evaluation page (EP_QUIK_EVAL_SCF) to enter or view feedback for individual items.

Navigation:

Click the **Quick Evaluation** icon of an item you want to evaluate.

This example illustrates the fields and controls on the Quick Evaluation page.

CancelQuick EvaluationDone

Competencies

Ability to manage own time
Effectively manages own time and energy. Handles a large and varied amount of work.

Manager



Betty Locherty

▼

Your rating is mandatory.

?

← → A A I A B I U 1= : = ☐ ▼

 Writing Tools

ⓘ

 Comments are required.

⚠

 Rosanna cannot see your evaluation

Related Competencies

☰ Custom

Able to prioritize tasks

Manager



Betty Locherty

▼

Your rating is mandatory.

This example illustrates the fields and controls on the Quick Evaluation page for the smartphone.

Cancel **Quick Evaluation** **Done**

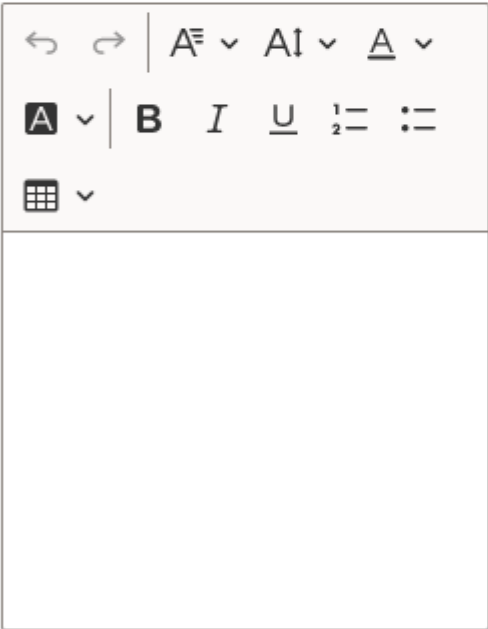
Competencies

Ability to manage own time
Effectively manages own time and energy.
Handles a large and varied amount of work.

Manager


Betty Locherty

Your rating is mandatory.



 [Writing Tools](#)

You have the option to enter item feedback on the:

- Quick Evaluation page.

Use this page if you want to enter feedback for the item and nothing else.

- Performance Document Item page.

Use this page if you want to enter feedback for the item and also any of these tasks: update item details, view other users' feedback to which you have access, and view previous feedback you entered.

Field or Control	Description
<Item title> and <Item description>	Displays the title and description of the item.
<Rating display>	Use the star or drop-down box rating display to provide rating. The corresponding rating description is displayed. (<i>Evaluation</i> step only) The system displays both the rating description and the corresponding numeric rating (or rating points, based on the selected calculation method) when a rating is selected. This rating display appears if your user role can rate items in the current step based on the template setup.
	Click to view rating descriptions of the associated rating model. This icon is available near a rating display. See Rating Model Page.
<Comment field>	Enter feedback for the item. This field appears if your role can provide item comments in the current step based on the template setup. Rich text editor (RTE) support for comments and other long fields can be enabled for Fluid ePerformance on the ePerformance Installation - ePerformance Page. (<i>Evaluation</i> step only) The minimum character count information is displayed, if comment is required for the current step and a minimum character count is specified in the template setup. Visibility information is also shown, indicating if the feedback you provide is shared with the employee or the manager. If the rich text field has a character limit, and copying and pasting rich text content from an external source exceeds the maximum character limit of the field, try pasting the content as plain text to remove the underlying text formatting information that's included in the copied content, then reapply formatting as needed.
Writing Tools	(<i>Evaluation</i> step only) Click to choose suggested texts as review comments from Writing Tools. See Writing Suggestions - All Page. This link appears below the comment field if one or more Writing Tools options are selected for your role on the Template Definition - Process Page.
<Sub-item title>	Displays the name of the sub-item. If the item contains sub-items, they are listed following their parent item.

Field or Control	Description
<Rating display>	Provide rating for the sub-item. This rating display appears if your user role can rate sub-items in the current step based on the template setup.

Notify Page

Use the Notify page (EP_EMAIL_NOTIFY_FL) to send messages about the document.

Navigation:

Select *Notify* from the **More Actions** menu of a document.

This example illustrates the fields and controls on the Notify page.

The screenshot shows a web form titled "Notify". At the top left is a "Cancel" button. The form contains three input fields: a "To" field, a "Subject" field, and a "*Message" field. The "*Message" field is a larger text area with a placeholder text "Please enter a maximum of 254 characters".

The manager can use the Notify page to send messages to the employee regarding the document during the review cycle. The employee and participant can use this page to send messages to the manager.

Field or Control	Description
To	Displays the recipient (the manager listed in the document header) of the message, if the recipient's email address is specified on the My System Profile page (USER_SELF_SERVICE). If the recipient's email address is not specified, the To field becomes a free-form text field. Enter the email address for the message to be sent. The Send button appears after an email address is entered.
Subject and Message	Enter the subject line and body of the message to be sent.

Rating History Page

Use the Rating History page (EP_HDR_RATING_SCF) to view past overall rating information for the employee for the same document type, if available.

Navigation:

Select *Rating History* from the **More Actions** menu of a document.

This example illustrates the fields and controls on the Rating History page.

Rating History ×	
 Rosanna Channing Senior Accounting Manager Annual Review • 1 Apr 2022 - 31 Mar 2023	
1 Jan - 31 Dec 2021 Senior Accounting Manager	Exceeds Expectations
1 Jan - 31 Dec 2020 Senior Accounting Manager	Exceeds Expectations
1 Jan - 31 Dec 2019 Senior Accounting Manager	Exceeds Expectations

This action, if enabled, is available in the *Evaluation* step.

360 Graphical View Page

Use the 360 Graphical View page (EP_360_REPORT) to view ratings from all evaluators and the calculated average rating for each section, item and sub-item of the document.

Navigation:

Select *360 Graphical Rating* from the **More Actions** menu of a document.

This example illustrates the fields and controls on the 360 Graphical View page (1 of 5).

360 Graphical View

[New Window](#) | [Help](#) | [Personalize Page](#)

Rosanna Channing, Senior Accounting Manager
Annual Review: -



Job Title Senior Accounting Manager

Document Type Annual Review

Template Annual w/ MidPeriod & Career

Status Pending Acknowledgement

Manager Betty Locherty

Period 01/01/2025 - 12/31/2025

Document ID 1375

Due Date 12/01/2025

This report provides a graphical overview of the average ratings that Rosanna Channing received from each group that evaluated her performance during the period.

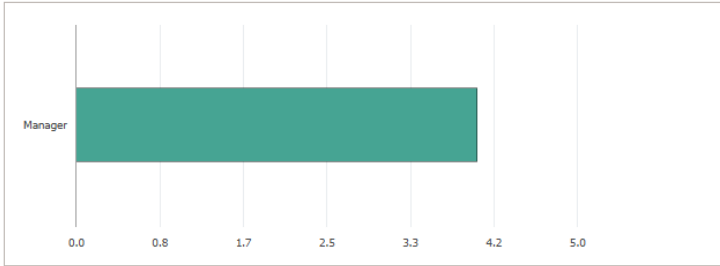
Section 1 - Goals

Below are the Items that were evaluated in the document. The average ratings listed in the graphs correspond to the following Rating Scale that was used to evaluate the employee's success in each Item.

Demonstrate Customer Respect and Loyalty

Average Rating Exceeds Expectations 4.00

Participant Ratings



Participant	Average Rating
Manager	4.00

This example illustrates the fields and controls on the 360 Graphical View page (2 of 5).



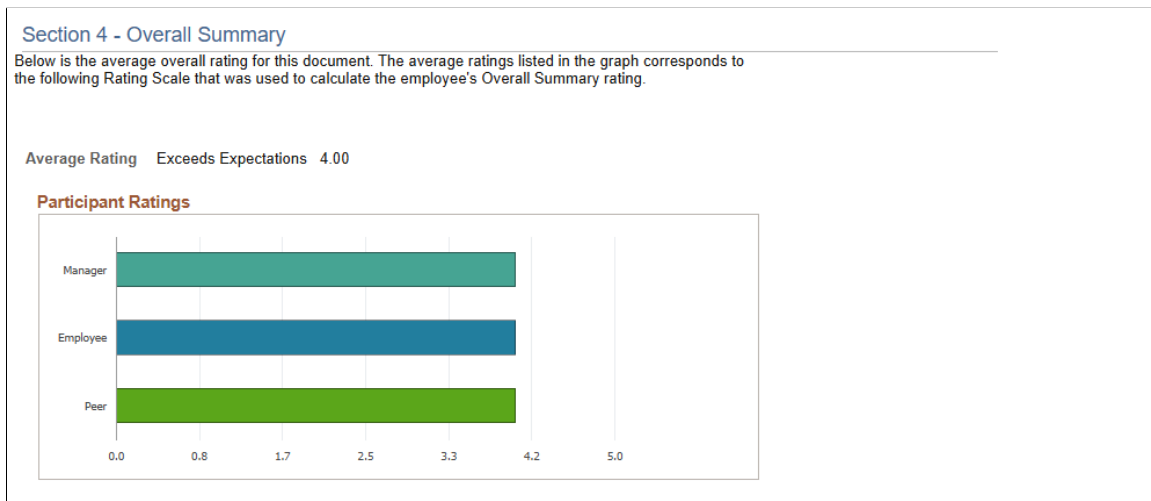
This example illustrates the fields and controls on the 360 Graphical View page (3 of 5).



This example illustrates the fields and controls on the 360 Graphical View page (4 of 5).



This example illustrates the fields and controls on the 360 Graphical View page (5 of 5).



This page shows the ratings provided by all evaluators for each section, item, and sub-item in individual horizontal bar charts, as well as the calculated average rating.

Only Goals and Overall Summary sections are presented in page screenshots for illustration purposes.

This action is available in the *Evaluation* step.

Related Links

[Average Ratings Page](#)

Attachment Page

Use the Attachment page (EP_ATTACH_SCF) to add or view file attachments in the document.

Navigation:

Select *Attachments* from the **More Actions** menu of a document.

This example illustrates the fields and controls on the Attachment page.

Cancel

Attachment

Done

Add Attachment

Attachments

1 row

Attachment	Description	Attached By	Attached	Attachment Audience
Reivew_Notes.docx	Review notes M-EM	John Patterson	02/15/2023 1:22:09PM	Employee and Manager

While a document is in progress, the author (manager in the case of a manager evaluation, or employee in the case of a self-evaluation) can add, view, or delete attachments, and specify who can see these attachments (when the Evaluation step of the document is completed).

Note: In addition to adding and managing attachments in the Evaluation step, setup options are available on the Template Definition - Process page to enable attachment support in the Define Criteria, Checkpoint, and Finalize Criteria steps as well.

The **Attachments** section is displayed as read-only on completed manager evaluations or self-evaluations. When the employee has completed the self-evaluation, the manager can see attachments that the employee uploaded with manager access from the manager document using the *View Employee Evaluation* action, followed by the *Attachments* action. The manager has the option to save the attachments. Similarly, when the manager has completed the Evaluation step of the manager document, the employee can see attachments that the manager uploaded with employee access from the manager document using the *Attachments* action.

Field or Control	Description
Add Attachment	Click to choose and insert files to the document. See Also “File Attachments and Attachment Pages” (Application Fundamentals).

Field or Control	Description
Attachment Audience	Select the roles of users who can view and download the file once the document (manager document or employee self-evaluation) is completed. If you select <i>Employee and Manager</i>, the file can be viewed and downloaded by the employee, manager, the manager's upward management chain, and the ePerformance administrator. If you select <i>Manager Only</i>, the file can only be viewed and downloaded by the manager, the manager's upward management chain, and the ePerformance administrator. If you select <i>Employee Only</i>, the file can only be viewed and downloaded by the employee.
Delete	You can only delete attachments that were uploaded by you.
Save	(Manager only) Save the document that was uploaded by the employee to the manager evaluation. This button appears if you access the Attachment page from a completed self-evaluation.

Check Language Page

Use the Check Language page (EP_LNG_CHECK_SCF) to check for inappropriate use of words and phrases in comments entered in the manager's document.

Navigation:

Select *Check Language* from the **More Actions** menu of a document.

This example illustrates the fields and controls on the Check Language page.

Check Language

Done

Incorrect Word or Phrase

Young

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.

⊗

 Incorrect Usage: Employee is too young to be managing other employees.

✓

 Proper Usage: Employee lacks the proper managerial training to manage other employees.

1 instance of 'Young' found in this comment

Overall Summary Section

☐

 She is doing exceptionally well, considered how young she is in this position.

Change

Ignore

Ignore All

For each word or phrase identified in the comments, the system lists that wording, its improper usage, and suggested edit at the top of the page as reference.

Each comment that contains the improper wording is displayed on the page, one at a time. The wording in question is highlighted for easy identification. Use the buttons available to perform necessary actions.

Field or Control	Description
Change	Click to make the comment editable in the comment field that appears, and update the content as needed. Click the Apply button to save the update or the Cancel button to dismiss the update.
Ignore	Click to skip the current instance of the highlighted word or phrase and move to the next improper word or phrase found.
Ignore All	Click to skip all instances of the highlighted word or phrase, and move to the first instance of the next highlighted word or phrase (if available).

Refer to the [Defining Content for the Language Checker Tool](#) topic for information on setting up content for use in the Language Checker.

Last Updated Page

Use the Last Updated page (EP_AUDIT_SCF) to view the audit information of documents or items.

Navigation:

- Select *Last Updated* from the **More Actions** menu of a document.
- Select *Last Updated* from the **More Actions** menu of an item.

This example illustrates the fields and controls on the Last Updated page for a document.

Last Updated

×



Define Criteria

Diane Palmer
Annual Review

Created By

Betty Locherty

Created On

28 Apr 2022 01:55:09 AM

This example illustrates the fields and controls on the Last Updated page for an item.

Last Updated

×



Competency Section

Adaptability to Change

Created By Profile	Created On 28 Apr 2022 01:55:10 AM
Last Modified By Betty Locherty	Last Modified On 18 May 2022 02:17:58 PM

This page shows the entity, date and time that the corresponding document or item was created and last updated (if applicable).

Performance Process Overview Page

Use the Performance Process Overview page (EP_APPR_HELP_SCF) to view the description and objective of each step in the performance process.

Navigation:

Select *Overview* from the **More Actions** menu of a document.

This example illustrates the fields and controls on the Performance Process Overview page.

Performance Process Overview x

▼ **Step 1: Define Criteria**

Update and Approve the Goals entered by the Employee

- During this step the employee should identify the goals that need to be accomplish during the performance period.
- Any core responsibilities or competencies not already defined should be added.
- The manager should review the goals and other performance content.
- When complete, the manager should mark this step approved.

▶ **Step 2: Complete Checkpoint**

▶ **Step 3: Finalize Criteria**

▶ **Step 4: Nominate Participants**

▶ **Step 5: Review Participant Evaluations**

▶ **Step 6: Review Self Evaluation**

The list of review process steps displayed on this page is based on the business processes that are enabled in the template setup. It includes descriptions of additional steps, such as nominate participants and review self evaluation, which do not appear in the drop-down list when you select the **Step Details** button.

<Section or Item> Weight Page

Use the Section Weight page (EP_SECT_WEIGHT_SCF) or Item Weight page (EP_ITEM_WEIGHT_SCF) to update document section (or item) weights.

Navigation:

- Click the **Section Weight [percentage]** link in a document section.
- Select *Define Section Weight* from the **More Actions** menu of a document section.
- Select *Define Item Weight* from the **More Actions** menu of a document section or item.

This example illustrates the fields and controls on the Section Weight page

Section Weight	
Cancel Done	
Sections	
Goals	50 %
Competencies	50 %
Total 100% Required 100%	

This example illustrates the fields and controls on the Item Weight page

Item Weight	
Cancel Done	
Competencies	
Analytical thinking	20 %
Organize & present ideas well	20 %
Teamwork and cooperation	20 %
Develop & implement solutions	20 %
Financial Accounting	20 %
Total 100% Required 100%	

This page lists the sections (or items) in the document that can be weighted based on the template setup.

Weighting is not available to sub-items.

Field or Control	Description
<Weight percentage field>	Enter the weight (a number in percentage) for the corresponding section (or item). It is a required field. The higher the weight, the more important the section (or item) is relative to rest of the sections (or items) in the document. Tab out for the system to calculate the total percentage automatically. If a section (or item) displays a minimum weight requirement, enter at least the minimum weight value for that section (or item). The total percentage of entered weights must be 100%.

Reorder Items Page

Use the Reorder Items page (EP_MAIN_REORD_SCF) to change the order of items displayed in document sections.

Navigation:

Select *Reorder Items* from the **More Actions** menu of a document section.

This example illustrates the fields and controls on the Reorder Items page.

Cancel

Reorder Items

Done

Employee Goals

Drag and drop items to reorder.

=

Monitor Outstanding Payables and Receivables Weekly

=

Effectively Manage Department Expense

=

Provide Internal Customers with Accurate and Timely Reports

=

Produce High Quality Financial Reports

To reorder the list of items in a section, drag and drop an item to the desired position on the list.

Note: Dragging and dropping of items is not supported in screen reader mode. To reorder items, enter a sequence number for each item. The item with the lowest number appears first on the list.

<Section> Page (Delete Multiple Items)

Use the <Section> Page (Delete Multiple Items) (EP_ITEM_SELECT_SCF) to remove one or more items from document sections.

Navigation:

Select *Delete Multiple Items* from the **More Actions** menu of a document section.

This example illustrates the fields and controls on the <Section> Page (Delete Multiple Items) page.

Cancel

Goals

Delete

Select items to be deleted from this section. An information icon is displayed if the item contains comments entered by the manager or employee.

☒

Communicate quarterly alliance results

3

☒

Design in-depth testing

☒

Cut operational expenses by 3%.

☒

Automate business process

1

Items can be removed from the same section in bulk on this page. Select the items to be removed. They can also be removed individually at the item level.

Field or Control	Description
	Indicates the number of sub-items that the item has.
	Indicates that the item contains comments entered by the manager or employee. You may want to review the item again before deciding to delete it.

Exclude Item Ratings Page

Use the Exclude Item Ratings page (EP_ITEM_EXCLUD_SCF) to select items or sub-items to be excluded from overall rating calculation.

Navigation:

Select *Exclude Item Ratings* from the **More Actions** menu of a document section.

This example illustrates the fields and controls on the Exclude Item Ratings page.

Cancel

Exclude Item Ratings

Done

Select Goals to be excluded from the rating calculation. Excluding Goals can impact the overall rating calculation of the document. Select Done to update the ratings with your selections.

Goals

☒
☐ **Develop New Business Relationships**
 No Rating Entered

☒
☒ **Identify new customers**
 No Rating Entered

☐
☒ **Maintain existing relationships**
 No Rating Entered

☒
☐ **Demonstrate Customer Respect and Loyalty**
 No Rating Entered

☐
☒ **Increase customer satisfaction by 10%**
 No Rating Entered

☐
☒ **Reduce Customer Complaints by 5%**
 No Rating Entered

☐
☐ **Increase Profits to Create Shareholder Value**
 No Rating Entered

☐
☒ **Increase Cash Reserves**
 No Rating Entered

☐
☒ **Cut operational expenses by 3%.**
 No Rating Entered

Excluding items or sub-items can impact the document's overall rating calculation. Item ratings are used in their section rating calculation, and section ratings are used to calculate the overall rating of the document.

From this page, you can select:

- Items to be excluded from the rating calculation of their section, and

- Sub-items (if available) to be excluded from their item rating calculation. At least one sub-item must remain included in an item.

Note: To ensure proper rating calculation, the system does not allow the exclusion of all items from a section, or all sub-items from an item.

Select **Done** to calculate all ratings in the document. An error is displayed if the item or sub-item exclusion policy is violated.

Exclude Rating Page

Use the Exclude Rating page (EP_ITEM_EXCLUD_SCF) to select the corresponding item or sub-items to be excluded from overall rating calculation.

Navigation:

Select *Exclude Rating* from the **More Actions** menu of a document item.

This example illustrates the fields and controls on the Exclude Rating page.

Exclude Rating

Cancel Done

Select Goals to be excluded from the rating calculation. Excluding Goals can impact the overall rating calculation of the document. Select Done to update the ratings with your selections.

Goals

- ☐ ☐ **Develop New Business Relationships**
Exceeds Expectations • Numeric Rating 4.00
- ☐ ☒ **Identify new customers**
Exceeds Expectations • Numeric Rating 4.00
- ☐ ☒ **Maintain existing relationships**
Meets Expectations • Numeric Rating 3.00

Excluding items or sub-items can impact the document's overall rating calculation. Item ratings are used in their section rating calculation, and section ratings are used to calculate the overall rating of the document.

From this page, you can select:

- The item to be excluded from the rating calculation of its section, and
- Sub-items (if available) to be excluded from their item rating calculation. At least one sub-item must remain included.

Note: To ensure proper rating calculation, the system does not allow the exclusion of all sub-items from an item.

Select **Done** to calculate all ratings in the document. An error is displayed if the item or sub-item exclusion policy is violated.

Note that if you select the *Exclude Rating* action for each of the items in a section *individually* and these items do not have sub-items, the system generates the error in the **Document Errors** section when the document is shared.

Excluded Items Page

Use the Exclude Items page (EP_ITEM_EXCLUD_SCF) to view items and sub-items that are excluded from the overall rating calculation.

Navigation:

Select the **View Excluded Ratings** link in the footer of a section summary or the **Overall Summary** section.

This example illustrates the Exclude Items page that is accessed from a section summary.

Excluded Items

These items have been excluded from the rating calculation.

Goals

☒	☐ Develop New Business Relationships Meets Expectations • Numeric Rating 3.00
☒	☒ Identify new customers Exceeds Expectations • Numeric Rating 4.00
☒	☐ Demonstrate Customer Respect and Loyalty No Rating Entered

This example illustrates the Exclude Items page that is accessed from the overall summary.

Excluded Items

×

These items have been excluded from the rating calculation.

Goals

☐

▢

Develop New Business Relationships

☒

⊞

Identify new customers

Exceeds Expectations • Numeric Rating 4.00

☒

▢

Demonstrate Customer Respect and Loyalty

No Rating Entered

Competencies

☒

▢

Analytical thinking

No Rating Entered

Use the **View Excluded Ratings** link from a section summary to view excluded items and sub-items for the associated section. Select the link from the **Overall Summary** section to view all excluded items and sub-items of the document, grouped by section.

Note that if a sub-item is excluded and its associated item is not, the rating of the item (if entered) is not shown.

Instructions Page

Use the Instructions page (EP_MAIN_INSTR_SCF) to view user instructions for document steps or sections.

Navigation:

Select *View Instructions* from the **More Actions** menu of a document step or section.

This example illustrates the fields and controls on the Instructions page.

Instructions ×

Define Criteria

1. Review the development criteria that the employee plans to accomplish during this period.
2. Once the development criteria are correct, select the **Complete** button (if available) to complete the step or **Save** button to save your changes. Optionally, select *Notify* from the **More Actions** menu at the document header level to email your employee.

Review the instructional text defined in the system for the corresponding document step or section.

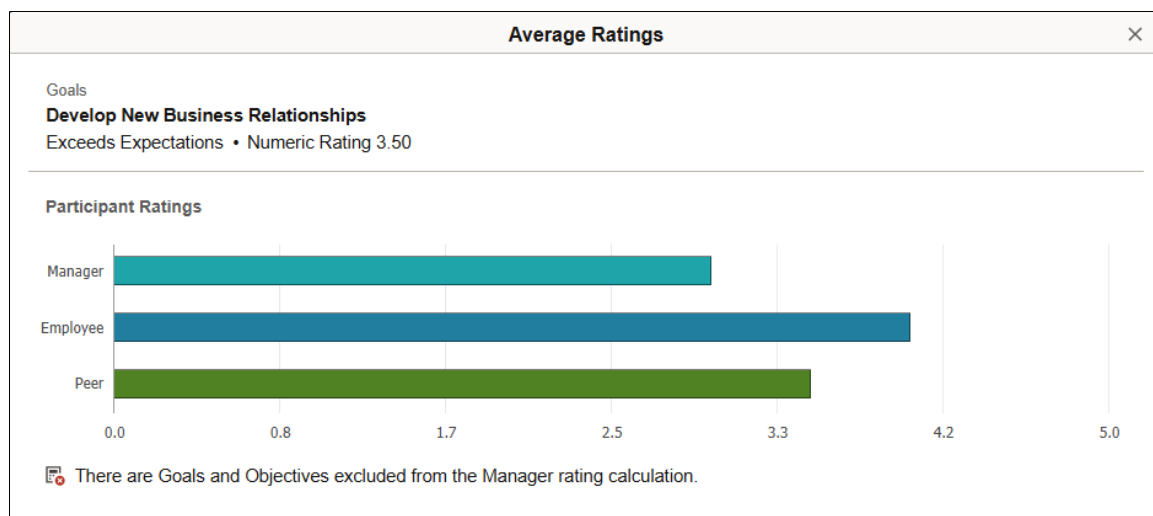
Average Ratings Page

Use the Average Ratings page (EP_AVG_CHART_SCF) to view ratings from all evaluators in a horizontal bar chart.

Navigation:

- Click the **View Graphical Rating** link in a section summary or the Overall Summary section.
- Select *View Graphical Rating* from the **More Actions** menu of an item.

This example illustrates the fields and controls on the Average Ratings page.



This page shows the ratings provided by all evaluators for the corresponding section or item in the bar chart. It also lists the calculated average rating.

Copy to Other Documents Page

Use the Copy to Other Documents page (EP_APPR_SEL_CPY_FL) to copy individual items to other employees' documents.

Navigation:

Select *Copy To* from the **More Actions** menu of an item.

This example illustrates the fields and controls on the Copy to Other Documents page.

Cancel

Copy to Other Documents

Save

This function will copy item **Adaptability to Change** to the selected documents.

This is the list of documents to which selected item(s) can be copied. This list includes only documents that have the same document type and section as the document you are currently on and where evaluation criteria is in progress.

Select All Deselect All

☐



Cynthia Adams
Corporate Controller
1 Apr 2022 - 31 Mar 2023

☐



Roberta Chancelor
Payroll Manager
1 Apr 2022 - 31 Mar 2023

☐



Rosanna Channing
Senior Accounting Manager
1 Apr 2022 - 31 Mar 2023

As you define the criteria, track progress, or finalize the criteria of a document, you have the option to copy items individually to other team members' documents. Documents with matching evaluation period, document type, and section are available for selection.

Any sub-item that exists in the selected item will also be copied to the selected documents.

Field or Control	Description
	Indicates that the selected item already exists in the associated document. If you select a document that already has the selected item, the system updates the existing item in the document with information from the newly copied item.

Rating Model Page

Use the Rating Model page (EP_RTGMDL_POPUP_FL) to view descriptions of the rating values that are available in the rating model.

Navigation:

Click the **Target Rating Description** or **Rating Description** icon next to a rating display on the [Performance Document Item Page](#) or [Performance Document Page](#).

This example illustrates the fields and controls on the Rating Model page.

Rating Model		×
★ ★ ★ ★ ★	Company Maker Numeric Rating 5.00	
★ ★ ★ ★ ☆	Exceeds Expectations Numeric Rating 4.00	
★ ★ ★ ☆ ☆	Meets Expectations Numeric Rating 3.00	
★ ★ ☆ ☆ ☆	Needs Improvement Numeric Rating 2.00	
★ ☆ ☆ ☆	Unsatisfactory Performance Numeric Rating 1.00	

The format of the content displayed on this page can be different based on the rating display (for example, stars or drop-down box) used.

Note: In Classic ePerformance, you can select a different rating on the Rating Model page. This option is *not* supported in Fluid ePerformance.

Writing Suggestions - All Page

Use the Writing Suggestions - All page (EP_WRITE_TOOL_SCF) to select suggested texts as review comments.

Navigation:

Click the **Writing Tools** link below a comment field in the document.

This example illustrates the fields and controls on the Writing Suggestions - All page.

Writing Tools supports text suggestions from different sources: comments from other evaluators, development tips, results writer statements, as well your own performance notes. All roles can have access to the Writing Tools functionality. Depending on your role access in the template, one or more page tabs become available where you can view and select suggested texts from different sources.

Note: Writing Tools functionality is available in the *Evaluation* step only.

Refer to the [Understanding Feedback Consolidation](#) topic for more information about writing tools.

The Writing Suggestions - All page lists:

- Performance notes that you entered for items.
 - If Writing Tools is launched from an item, performance notes you added for that item, its section, and other items in the same section are displayed.
 - If Writing Tools is launched from a section summary, performance notes you added for that section as well as items in that section are displayed.

If Writing Tools is launched from the Overall Summary section, all performance notes you added for the document, sections and items are displayed.
- (Manager only) Comments entered by other evaluators for the item or section from where the Writing Tools is launched. These evaluators include the employee and individuals who participated in the review.
- Applicable results writer statements (and development tips) for the item or section from where the Writing Tools is launched.
 - If Writing Tools is launched from an item that has a rating, and the Results Writer (or Development Tips) option in the template setup is *Competency*, the system displays results writer

statements (or development tips) that are associated with the item rating from the results writer (or link development tips) definition for competency.

If the Results Writer (or Development Tips) option in the template setup is *Sub-Competency*, the system finds sub-items with ratings in that item, and displays results writer statements (or development tips) that are associated with the sub-item ratings from the results writer (or link development tips) definition for sub-competencies.

- If Writing Tools is launched from a section, and the Results Writer (or Development Tips) option in the template setup is *Competency*, the system finds all items with ratings in that section, and displays results writer statements (or development tips) that are associated with the item ratings from the results writer (or link development tips) definition for competency.

If the Results Writer (or Development Tips) option in the template setup is *Sub-Competency*, the system finds all sub-items with ratings from items in that section, and displays results writer statements (or development tips) that are associated with the sub-item ratings from the results writer (or link development tips) definition for sub-competencies.

Select applicable text entries and then the **Add to Comments** button to insert the content to the comment field. Selected entries are removed from the list automatically. Edit the content as needed and click the **Done** button to add it to the document as comment.

See Also

[Writing Suggestions - Evaluators' Comment Page](#)

[Writing Suggestions - Development Tips Page](#)

[Writing Suggestions - Results Writer Page](#)

[Writing Suggestions - Performance Notes Page](#)

Writing Suggestions - Evaluators' Comment Page

Use the Writing Suggestions - Evaluators' Comment page (EP_WRITE_TOOL_SCF) to select existing comments from other evaluators as review comments.

Navigation:

Click the **Writing Tools** link below a comment field in the document. Click the **Evaluators' Comment** page tab.

This example illustrates the fields and controls on the Writing Suggestions - Evaluators' Comment page.

Note: Writing Tools functionality is available in the *Evaluation* step only.

Available to the manager only, this page is available if the **Other Evaluator Comments** option is enabled for the manager role on the Template Definition - Process Page. This option is available at the section and item levels.

The Writing Suggestions - Evaluator's Comments page lists all comments that were entered in the document by the employee and review participants. Use search fields that are available to refine the search results if necessary.

Select applicable text entries and then the **Add to Comments** button to insert the content to the comment field. Selected entries are removed from the list automatically. Edit the content as needed and click the **Done** button to add it to the document as comment.

Writing Suggestions - Development Tips Page

Use the Writing Suggestions - Development Tips page (EP_WRITE_TOOL_SCF) to select development tips as review comments.

Navigation:

Click the **Writing Tools** link below a comment field in the document. Click the **Development Tips** page tab.

This example illustrates the fields and controls on the Writing Suggestions - Development Tips page.

Writing Suggestions

Cancel Done

Competencies - Communication Skills

Cynthia Adams

All Evaluators' Comments **Development Tips** Results Writer Performance Notes

Search

Search for text
focus

*Competency

Sub-Competency

Review Rating

Search Clear

Select All Deselect All

☐ Build up your confidence. Maybe you're slow to act because you don't think you're up to the task. If you boldly act, others will shoot you down and find you out. Take a course or work with a tutor to bolster your confidence in one skill or area at a time. Focus on the strengths you do have; think of ways you can use these strengths when making nerve wracking actions. If you are interpersonally skilled, for example, see yourself smoothly dealing with questions and objections to your actions. The only way you will ever know what you can do is to act and find out.

☐ Disorganized? Don't always get to everything on time? Forget deadlines? Lose requests for decisions? Under time pressure and increased uncertainty, you have to put the keel in the water yourself. You can't operate helter skelter and make quality timely decisions. You need to set tighter priorities. Focus more on the mission-critical few decisions. Don't get diverted by trivial work and other decisions. Get better organized and disciplined. Keep a decision log. When a decision opportunity surfaces, immediately log it along with the ideal date it needs to be made. Plan backwards to the work necessary to make the decision on time. If you are not disciplined in how you work and are sometimes late making decisions and taking action because of it, buy a book on both Total Quality Management and Process Re-Engineering. Go to one workshop on efficient and effective work design. More help? - See #50 Priority Setting, #52 Process Management, #62 Time Management and #63 Total Quality Management/ Re-Engineering.

☐ Lost your passion? Run out of gas? Heart's not in it anymore? Not 100% committed? Doing the same sort of work a long time and you're bored with it? Seen it all; done the same tasks, made the same decisions, worked with the same people? To make the best of this, make a list of what you like and don't like to do. Concentrate on doing at least a couple of liked activities each day. Work to delegate or task trade the things that are no longer motivating to you. Do your least preferred activities first; focus not on the activity, but your sense of accomplishment. Change your work activity to mirror your interests as much as you can. Volunteer for taskforces and projects that would be motivating for you.

Note: Writing Tools functionality is available in the *Evaluation* step only.

The Writing Suggestions - Development Tips is available if the **Development Tips** option is enabled for your role on the Template Definition - Process Page. This option is available at the section and item levels.

This page lists development tips that can be used as review comments. Development tips are predefined statements that provide tips on how employees can develop their proficiency. Use search fields that are available to refine the search results if necessary.

Select applicable text entries and then the **Add to Comments** button to insert the content to the comment field. Selected entries are removed from the list automatically. Edit the content as needed and click the **Done** button to add it to the document as comment.

Refer to the [Understanding Advisor Tools](#) topic for more information on setting up the development tip writing tool.

Writing Suggestions - Results Writer Page

Use the Writing Suggestions - Results Writer page (EP_WRITE_TOOL_SCF) to select results writer statements as review comments.

Navigation:

Click the **Writing Tools** link below a comment field in the document. Click the **Results Writer** page tab.

This example illustrates the fields and controls on the Writing Suggestions - Results Writer page.

Note: Writing Tools functionality is available in the *Evaluation* step only.

The Writing Suggestions - Results Writer page is available if the **Results Writer** option is enabled for your role on the Template Definition - Process Page. This option is available at the section and item levels.

This page lists results writer statements that can be used as review comments. Results writer statements are predefined content that describes an employee's proficiency for a given competency or sub-competency. Use search fields that are available to refine the search results if necessary.

Select applicable text entries and then the **Add to Comments** button to insert the content to the comment field. Selected entries are removed from the list automatically. Edit the content as needed and click the **Done** button to add it to the document as comment.

Refer to the [Understanding Advisor Tools](#) topic for more information on setting up the results writer writing tool.

Writing Suggestions - Performance Notes Page

Use the Writing Suggestions - Performance Notes page (EP_WRITE_TOOL_SCF) to select your own performance notes as review comments.

Navigation:

Click the **Writing Tools** link below a comment field in the document. Click the **Performance Notes** page tab.

This example illustrates the fields and controls on the Writing Suggestions - Performance Notes page.

Note: Writing Tools functionality is available in the *Evaluation* step only.

note e is available if the **Notes** option is enabled for your role on the Template Definition - Process Page. This option is available at the section and item levels.

Use this page to search and add performance notes previously entered on the My Notes Page as evaluation comments. Use the date search fields (or leave them blank) to look up:

- Performance notes created for the section and section items, when accessing the Writing Tools from a section summary or an item.
- Performance notes created for the document, sections, and section items, when accessing the Writing Tools from the **Overall Summary** section.

You can only retrieve notes that were entered by or transferred to you.

Select applicable text entries and then the **Add to Comments** button to insert the content to the comment field. Selected entries are removed from the list automatically. Edit the content as needed and click the **Done** button to add it to the document as comment.

(Fluid) Modifying Evaluation Criteria

This topic discusses how to update document evaluation criteria in Fluid.

Pages Used to Modify Evaluation Criteria in Fluid

Page Name	Definition Name	Usage
<u>Performance Document Page (Define Criteria Step)</u>	EP_MAIN_DOC_B_FL	Add or update evaluation criteria for documents.
<u>Select/Create Items Page</u>	EP_ADD_ITEM_SCF	Add items to document sections.
<u>Select/Create Items - Pre-defined Page</u>	EP_ADD_ITEM_SCF	Add pre-defined items to document sections.
<u>Select/Create Items - Your Own Page</u>	EP_ADD_ITEM_SCF	Add items that you create manually to document sections.
<u>Select/Create Items - Business Objectives Page</u>	EP_ADD_ITEM_SCF	Add items from business objectives to document sections.
<u>Select/Create Items - Manager Document Page</u>	EP_ADD_ITEM_SCF	(Employee only) Add items from your manager's documents to document sections.
<u>Select/Create Items - My Document Page</u>	EP_ADD_ITEM_SCF	Add items from the manager's or employee's own documents to document sections.
<u>Select/Create Items - Team Document Page</u>	EP_ADD_ITEM_SCF	(Manager only) Add items from your team's documents to document sections.
<u><Section Name> in List Page</u>	EP_MAIN_ADDITM_SCF	View or remove items from the document section.
<u>Details Page</u>	EP_MAIN_OINFO_SCF	View additional information of the item.
<u>Performance Document Item Page</u>	EP_MAIN_B_ITMED_FL	View or update item details.
<u>Alignment Chain Page</u>	EPO_ALIGN_CHN_SCF	View the alignment of the current objective with its corporate or departmental objectives in the organization.
<u>Sub-Items Page</u>	EP_MAIN_ADDSUB_SCF	Add pre-defined sub-items to items.
<u>My Notes Page</u>	EP_MAIN_NOTES_SCF	Add, update or delete notes.
<u>Notify Page</u>	EP_EMAIL_NOTIFY_FL	Send messages about the document.

Page Name	Definition Name	Usage
<u>Last Updated Page</u>	EP_AUDIT_SCF	View the audit information of documents or items.
<u>Performance Process Overview Page</u>	EP_APPR_HELP_SCF	View the description and objective of each step in the performance process.
<u><Section or Item> Weight Page</u>	EP_SECT_WEIGHT_SCF	Update document section (or item) weights.
<u>Reorder Items Page</u>	EP_MAIN_REORD_SCF	Change the order of items displayed in document sections.
<u><Section> Page (Delete Multiple Items)</u>	EP_ITEM_SELECT_SCF	Remove one or more items from document sections.
<u>Copy to Other Documents Page</u>	EP_APPR_SEL_CPY_FL	Copy individual items to other employees' documents.
<u>Add/Review Participants Page</u>	EP_APPR_NOM_FL	Add and track participant requests and evaluations.
<u>Instructions Page</u>	EP_MAIN_INSTR_SCF	View user instructions for document steps or sections.

Understanding Evaluation Criteria Modification in Fluid

Fluid ePerformance and Classic ePerformance support the same process for modifying evaluation criteria in the *Define Criteria* step. For more information about this step and what users can do, refer to the [Understanding Evaluation Criteria Modification](#) topic.

Despite the common functionality shared between the two versions, Fluid ePerformance behaves differently from Classic ePerformance in these areas:

- Participant feedback.

In Fluid ePerformance, both the manager and the employee can view completed participant evaluations from the Add/Review Participants page when the **View Evaluations** option is enabled for their roles in the template setup.

In Classic ePerformance, users view completed participant evaluations from a link in the *Review Participant Evaluations* step.

In both Fluid and Classic ePerformance, the manager can view inline participant feedback from the document directly, if the **Participant Feedback** option is enabled in the Role Rules section of a document step in the template setup. Participant feedback can be available as early as the first document step, if participants are allowed to provide feedback at anytime.

- Reopening the *Define Criteria* step.

A prior step can be reopened for updates as needed. If you move to the current step and have not made any changes, you can reopen the prior step from the **More Actions** menu that is located at the step level.

In Classic ePerformance, additional conditions are also considered.

Performance Document Page (Define Criteria Step)

Use the Performance Document page (EP_MAIN_DOC_B_FL) to add or update evaluation criteria for documents.

Navigation:

Select a document from the **Define Criteria** section of a document list (Team Documents, Delegated Documents, or My Documents).

This is an example of the Performance Document page in the Define Criteria step (1 of 2).

Performance Document

In Progress

Preliminary Rating: Meets Expectations



John Patterson

Manager-Revenue • 1 Jan - 31 Dec 2024





Instructions

- Review the performance criteria (goals and/or responsibilities) that the employee plans to accomplish during the performance period.
- Once the performance criteria are correct, select the **Complete** button (if available) to complete the step or **Save** button to save your changes. Optionally, select *Notify* from the **More Actions** menu at the document header level to email your employee.

Step 1 of 4

Define Criteria

Complete

Goals

Review the goals that the employee plans to accomplish during the performance period.

Section Weight 0 % • Evaluated by Employee, Manager, Peer

Promote Business Growth

No Due Date • Weight 50%

Produce High Quality Financial Reports

No Due Date • Weight 50%

Summary

Participant



Cynthia Adams

Meets Expectations

John met the expectation of all goals.

This is an example of the Performance Document page in the Define Criteria step (2 of 2).

Competencies

Review the competencies that the employee plans to accomplish during the performance period.

Section Weight 0 % • Evaluated by Employee, Manager, Peer

Provides Direction

No Due Date • Weight 50%

Managerial Efficiency

No Due Date • Weight 50%

Career Plan Summary

Review or update the employee's career plan.

Risk of Leaving
High

Impact of Loss
High

Career Potential
High

> Official Career Path

Update Employee Career Plan

Note: The fields and controls that appear in a document is controlled by its template, which is highly configurable. The sample document used in this topic is for demonstration purposes only, and is likely to look different from your implementation.

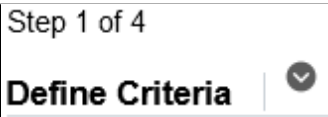
Instructions

This section displays user instructions for the current document step. Instructions are text catalog entries. The content can be different based on the document usage, the role of the logged-in user, and the current document step.

It appears when the **View Instructions** field is set to *Display in Modal Window* in the document's template definition.

See Template Definition - General Page.

Step Information and Actions

<i>Field or Control</i>	<i>Description</i>
	Displays the step of the review process that the document is currently in. Select the icon to expand the popup menu and view the overall progress of the document in the review process. The popup menu displays the list of steps (and due dates) that are available in the review process, based on the associated template. The steps shown may or may not be entirely applicable to the user who is viewing the list. The list provides a quick update of where you are in the review process. It shows the current step (name appears in bold font), previous steps that were done (<i>Completed</i> or <i>Skipped</i>), and remaining steps to be worked on (<i>Not Started</i>). You can select a previous step to view the last-updated and read-only version of the document in that step. Some actions are still available for you to drill down and view the content of the document, such as item details, ratings and comments, and notes. However, you can no longer edit the document.
Complete	Click this button to complete the <i>Define Criteria</i> step.
	Click to view the list of actions that are applicable to the current step and select an action to perform. The list of actions varies based on a few factors, such as the template setup, the current step of the document, and your user role. See Step-Level More Actions.

Document Errors

After you have selected the action button on the document page, this section appears if errors are found by the validation check performed for the current document step. It displays error messages that need to be addressed before proceeding to the next action. Some of the step-specific errors include:

- Document is not shared with the employee or the manager.
- Section weightings are required but not specified.
- Item weightings are required but not specified.
- Section, item, or sub-item ratings are required but not entered.
- Section or item comments are required but not entered.

- Minimum comment length is not met.

<i>Field or Control</i>	<i>Description</i>
Run Error Check or Rerun Error Check	Select to run validation checks on the document. Select an error row and fill out the requested information on the modal page that appears. After updating and closing the modal page, the validation runs automatically and removes the fixed row or rows from the list. Note: When you fix the reported errors by updating the document directly rather than going through the modal pages from the list, the validation does not occur automatically. In this case, use the Rerun Error Check button or the action button to validate the document manually.

<Section Name>

See Also [Performance Document Page](#), <Section Name> section.

<i>Field or Control</i>	<i>Description</i>
	Click to add items to the section on the Select/Create Items Page. This action is available if your role can add items in the current step based on the template setup.
	Click to view the list of actions that are applicable to the section and select an action to perform. The list of actions varies based on a few factors, such as the template setup, the current step of the document, and your user role. See Section-Level More Actions. Note: The More Actions menu is not available to sections that cannot be weighted or cannot have items, for example, Career Plan Summary, Employee Comments, Manager Comments, Overall Summary, Signatures and eSignatures.

Field or Control	Description
Section Weight <number> %	Displays the weight of the section in percentage. The total weight of all weighted sections in a document is 100%. Click this link to update the section weight on the Section Weight page. This link appears if the section can be weighted based on the template setup. See <Section or Item> Weight Page.
<Item title>	Click to access the item on the Performance Document Item Page .
	Indicates the number of sub-items added to the corresponding item.
Weight <number>%	Displays the weight of the item in percentage. The total weight of all items in a section is 100%. This text appears if items in this section can be weighted based on the template setup.
	Click to view or add notes for the item on the My Notes Page. This icon appears if notes were added to the item.
	Click to view the list of actions that are applicable to the item and select an action to perform. The list of actions varies based on a few factors, such as the template setup, the current step of the document, and your user role. See Item-Level More Actions.
Summary	(Manager only) Click the link to expand the summary area and view feedback entered by participants for the section. This link appears if participant feedback is available during the <i>Define Criteria</i> step and your user role has the permission to view it.

Career Plan Summary

This section lists the career planning information for the employee. This section appears if it is included in the template setup. It is tied to the *Career Planning Summary* special processing and does not include any items. The section name is configurable in the template.

This section is applicable to the manager only.

Field or Control	Description
Risk of Leaving	Displays the risk of the employee leaving the current position, as specified on the Manage Career Plans page.
Impact of Loss	Displays the impact to the organization if the employee leaves the current position, as specified on the Manage Career Plans page.
Career Potential	Displays the career potential of the employee, as specified on the Manage Career Plans - Ranking/Potential page.
Official Career Path	Click to view the list of career moves made by the employee on a modal page. This information comes from the Manage Career Plans - Career Path page.
Manager Agreed Career Path	Click to view the list of manager-supported career moves made by this employee, as specified on the Manage Career Plans - Career Path page.
Personal Path	Click to view the personal career path that was created by this employee on a modal page. This information comes from 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	Use this link to navigate to the Manage Career Plans component in Manager Self Service to perform necessary activities on the employee's most current career plan. This link appears if you (the logged-on user) are 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 "Manage Career Plans Component" (PeopleSoft Human Resources Plan Careers and Successions).

Overall Summary

(Manager only) Use the **Overall Summary** section to view the overall feedback entered by participants. It appears if participant feedback is available during this step and your user role has the permission to view it.

This section is tied to the *Overall Summary* special processing and does not include any items. The section name is configurable in the template.

The look and feel of the **Overall Summary** section is the same as the section summary.

For more information, refer to [Performance Document Page \(Checkpoint or Finalize Criteria Step\)](#), (Section) Summary section.

(Fluid) Tracking Mid-Period Progress

This topic discusses how to track mid-period progress in Fluid.

Pages Used to Track Mid-Period Progress in Fluid

Page Name	Definition Name	Usage
Performance Document Page (Checkpoint or Finalize Criteria Step)	EP_MAIN_DOC_B_FL	Provide feedback on employees' progress in the <i>Checkpoint</i> step, or finalize evaluation criteria before the start of final evaluation in the <i>Finalize Criteria</i> step.
Select/Create Items Page	EP_ADD_ITEM_SCF	Add items to document sections.
Select/Create Items - Pre-defined Page	EP_ADD_ITEM_SCF	Add pre-defined items to document sections.
Select/Create Items - Your Own Page	EP_ADD_ITEM_SCF	Add items that you create manually to document sections.
Select/Create Items - Business Objectives Page	EP_ADD_ITEM_SCF	Add items from business objectives to document sections.
Select/Create Items - Manager Document Page	EP_ADD_ITEM_SCF	(Employee only) Add items from your manager's documents to document sections.
Select/Create Items - My Document Page	EP_ADD_ITEM_SCF	Add items from the manager's or employee's own documents to document sections.
Select/Create Items - Team Document Page	EP_ADD_ITEM_SCF	(Manager only) Add items from your team's documents to document sections.
<Section Name> in List Page	EP_MAIN_ADDITM_SCF	View or remove items from the document section.

<i>Page Name</i>	<i>Definition Name</i>	<i>Usage</i>
<u>Details Page</u>	EP_MAIN_OINFO_SCF	View additional information of the item.
<u>Performance Document Item Page</u>	EP_MAIN_B_ITMED_FL	View or update item details.
<u>Alignment Chain Page</u>	EPO_ALIGN_CHN_SCF	View the alignment of the current objective with its corporate or departmental objectives in the organization.
<u>Sub-Items Page</u>	EP_MAIN_ADDSUB_SCF	Add pre-defined sub-items to items.
<u>My Notes Page</u>	EP_MAIN_NOTES_SCF	Add, update or delete notes.
<u>Quick Evaluation Page</u>	EP_QUIK_EVAL_SCF	Enter or view feedback for individual items.
<u>Notify Page</u>	EP_EMAIL_NOTIFY_FL	Send messages about the document.
<u>Last Updated Page</u>	EP_AUDIT_SCF	View the audit information of documents or items.
<u>Performance Process Overview Page</u>	EP_APPR_HELP_SCF	View the description and objective of each step in the performance process.
<u><Section or Item> Weight Page</u>	EP_SECT_WEIGHT_SCF	Update document section (or item) weights.
<u>Reorder Items Page</u>	EP_MAIN_REORD_SCF	Change the order of items displayed in document sections.
<u><Section> Page (Delete Multiple Items)</u>	EP_ITEM_SELECT_SCF	Remove one or more items from document sections.
<u>Copy to Other Documents Page</u>	EP_APPR_SEL_CPY_FL	Copy individual items to other employees' documents.
<u>Rating Model Page</u>	EP_RTGMDL_POPUP_FL	View descriptions of the rating values that are available in the rating model.
<u>Add/Review Participants Page</u>	EP_APPR_NOM_FL	Add and track participant requests and evaluations.
<u>Instructions Page</u>	EP_MAIN_INSTR_SCF	View user instructions for document steps or sections.

Understanding Mid-Period Progress Tracking in Fluid

Fluid ePerformance and Classic ePerformance support the same process for tracking employees' mid-period progress in the *Track Progress* step, which includes *Checkpoint* and *Finalize Criteria* steps).

For more information about this step and what users can do, refer to the [Understanding Mid-Period Checkpoints](#) topic.

Despite the common functionality shared between the two versions, Fluid ePerformance behaves differently from Classic ePerformance in these areas:

- Participant feedback.

In Fluid ePerformance, both the manager and the employee can view completed participant evaluations from the Add/Review Participants page when the **View Evaluations** option is enabled for their roles in the template setup.

In Classic ePerformance, users view completed participant evaluations from a link in the *Review Participant Evaluations* step.

In both Fluid and Classic ePerformance, the manager can view inline participant feedback from the document directly, if the **Participant Feedback** option is enabled in the Role Rules section of a document step in the template setup. Participant feedback can be available as early as the first document step, if participants are allowed to provide feedback at anytime.

- Reopening the *Checkpoint* and *Finalize Criteria* step.

A prior step can be reopened for updates as needed. If you move to the current step and have not made any changes, you can reopen the prior step from the **More Actions** menu that is located at the step level.

In Classic ePerformance, additional conditions are also considered.

- Both the manager and the employee can rate sections, items and sub-items in the *Track Progress* step if the options are enabled for their roles in the template setup.

In Classic ePerformance, these options are not supported.

- The Stars rating model.

Users can provide ratings using the stars rating model.

In Classic ePerformance, this option is not supported.

- Copy ratings to evaluation documents

A new option is available to copy section and item ratings from the *Finalize Criteria* step to the *Evaluation* step. Manager ratings will be available in the manager document, and employee ratings in the employee's self-evaluation.

In Classic ePerformance, this option is not supported.

Performance Document Page (Checkpoint or Finalize Criteria Step)

Use the Performance Document page (EP_MAIN_DOC_B_FL) to provide feedback on employees' progress in the *Checkpoint* step, or finalize evaluation criteria before the start of final evaluation in the *Finalize Criteria* step.

Navigation:

Select a document from the **Track Progress** section of a document list (Team Documents, Delegated Documents, or My Documents).

Documents in the *Checkpoint* or *Finalize Criteria* steps are grouped together under the **Track Progress** section of the document list.

This is an example of the Performance Document page in the Checkpoint step. The layout of the page is the same for the Finalize Criteria step (1 of 3).

Performance Document

In Progress

Preliminary Rating: Meets Expectations



John Patterson

Manager-Revenue • 1 Jan - 31 Dec 2024

Save

Share

More

Instructions

1. Enter your ratings and comments on the employee's progress against their performance criteria.
2. When ready select the **Change Visibility** link to share your ratings and comments with the employee. This can be done before or after you meet with the employee to discuss their progress.
3. Once you have shared the document and had a discussion, select the **Complete** button to mark this step as complete.

Step 2 of 4

Checkpoint 1

Complete

John cannot see your evaluation

Change Visibility

Goals

Enter ratings and/or comments for the listed goals.

Section Weight 0 % • Evaluated by Employee, Manager, Peer

Promote Business Growth

No Due Date • Weight 50%

Produce High Quality Financial Reports

No Due Date • Weight 50%

This is an example of the Performance Document page in the Checkpoint step. The layout of the page is the same for the Finalize Criteria step (2 of 3).

Summary

Employee


John Patterson
Employee's comments are not shared

Participant


Cynthia Adams
Meets Expectations
John met the expectation of all goals.

Manager


Rosanna Channing
☆☆☆☆☆ Select Rating

↶ ↷ A[Ⓐ] AI A B I U

Type comment here...

John cannot see your evaluation

This is an example of the Performance Document page in the Checkpoint step. The layout of the page is the same for the Finalize Criteria step (3 of 3).

Competencies

Summary

Career Plan Summary

Overall Summary

Enter comments for this employee.

Employee


John Patterson

Manager


Rosanna Channing

↶ ↷ A[Ⓐ] AI A B I U

Type comment here...

Note: The fields and controls that appear in a document is controlled by its template, which is highly configurable. The sample document used in this topic is for demonstration purposes only, and is likely to look different from your implementation.

In addition to updating evaluation criteria for the review, the manager and the employee can provide feedback on the employee's progress and share it with each other in the *Checkpoint* and *Finalize Criteria* steps.

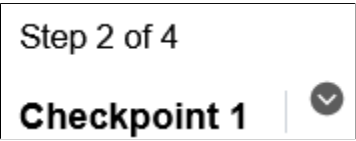
Instructions

This section displays user instructions for the current document step. Instructions are text catalog entries. The content can be different based on the document usage, the role of the logged-in user, and the current document step.

It appears when the **View Instructions** field is set to *Display in Modal Window* in the document's template definition.

See [Template Definition - General Page](#).

Step Information and Actions

Field or Control	Description
	Displays the step of the review process that the document is currently in. Select the icon to expand the popup menu and view the overall progress of the document in the review process. The popup menu displays the list of steps (and due dates) that are available in the review process, based on the associated template. The steps shown may or may not be entirely applicable to the user who is viewing the list. The list provides a quick update of where you are in the review process. It shows the current step (name appears in bold font), previous steps that were done (<i>Completed</i> or <i>Skipped</i>), and remaining steps to be worked on (<i>Not Started</i>). You can select a previous step to view the last-updated and read-only version of the document in that step. Some actions are still available for you to drill down and view the content of the document, such as item details, ratings and comments, and notes. However, you can no longer edit the document.
Complete (for <i>Checkpoint</i> step)	(Manager only) Click this button to complete the checkpoint. The manager must share the ratings and comments with the employee prior to completing a checkpoint.

Field or Control	Description
Complete (for <i>Finalize Criteria</i> step)	Click this button to complete the <i>Finalize Criteria</i> step. This button can be available to the employee, the manager, or both, as configured in the template setup. Sharing of ratings and comments is optional prior to completing the <i>Finalize Criteria</i> step.
	Click to view the list of actions that are applicable to the current step and select an action to perform. The list of actions varies based on a few factors, such as the template setup, the current step of the document, and your user role. See Step-Level More Actions.
Change Visibility	(<i>Checkpoint</i> and <i>Finalize Criteria</i> steps only) The text displayed to the left of the Change Visibility link states the current visibility setting of the document. Click this link to share or unshare your feedback (ratings and comments) with the employee or manager on the Change Visibility page (modal) that appears. After the information is shared, click the action button. After that, the system unshares the information by resetting to <i>Only You</i> automatically.

Document Errors

After you have selected the action button on the document page, this section appears if errors are found by the validation check performed for the current document step. It displays error messages that need to be addressed before proceeding to the next action. Some of the step-specific errors include:

- Document is not shared with the employee or the manager.
- Section weightings are required but not specified.
- Item weightings are required but not specified.
- Section, item, or sub-item ratings are required but not entered.
- Section or item comments are required but not entered.
- Minimum comment length is not met.

<i>Field or Control</i>	<i>Description</i>
Run Error Check or Rerun Error Check	Select to run validation checks on the document. Select an error row and fill out the requested information on the modal page that appears. After updating and closing the modal page, the validation runs automatically and removes the fixed row or rows from the list. Note: When you fix the reported errors by updating the document directly rather than going through the modal pages from the list, the validation does not occur automatically. In this case, use the Rerun Error Check button or the action button to validate the document manually.

<Section Name>

See Also [Performance Document Page](#), <Section Name> section.

<i>Field or Control</i>	<i>Description</i>
	Click to add items to the section on the Select/Create Items Page. This action is available if your role can add items in the current step based on the template setup.
	Click to view the list of actions that are applicable to the section and select an action to perform. The list of actions varies based on a few factors, such as the template setup, the current step of the document, and your user role. See Section-Level More Actions. Note: The More Actions menu is not available to sections that cannot be weighted or cannot have items, for example, Career Plan Summary, Employee Comments, Manager Comments, Overall Summary, Signatures and eSignatures.

Field or Control	Description
Section Weight <number> %	Displays the weight of the section in percentage. The total weight of all weighted sections in a document is 100%. Click this link to update the section weight on the Section Weight page. This link appears if the section can be weighted based on the template setup. See <Section or Item> Weight Page.
<Item title>	Click to access the item on the Performance Document Item Page .
	Indicates the number of sub-items added to the corresponding item.
	Click to view or add notes for the item on the My Notes Page. This icon appears if notes were added to the item.
 or 	Click to view existing or add new feedback for the corresponding item (and sub-items if applicable) on the Quick Evaluation Page. This icon appears if your role can perform <i>any</i> of these actions based on the template setup: • Rate items or sub-items in the current step • Enter item comments in the current step
	Click to view the list of actions that are applicable to the item and select an action to perform. The list of actions varies based on a few factors, such as the template setup, the current step of the document, and your user role. See Item-Level More Actions.

(Section) Summary

Click the **Summary** link of a section to expand the area and perform any of these tasks:

- View section feedback shared by the employee or the manager.
- (Manager only) View section feedback entered by participants, if applicable.
- Enter your section feedback.

A section summary appears if your role is configured in the template setup to perform any of the listed tasks. If a role (for example, peer) does not have permission to provide feedback in a section summary, or you do not have permission to view the information, the feedback (or the subsection) for that role within the section summary is not shown.

Field or Control	Description
<Rating display>	Use the star or drop-down box rating display to provide rating. The corresponding rating description is displayed. This rating display appears if your role can rate sections in the current step based on the template setup. Note: The option to automatically calculate ratings is not supported in the <i>Checkpoint</i> or <i>Finalize Criteria</i> step.
	Click to view rating descriptions of the associated rating model. This icon is available near a rating display. See Rating Model Page.
<Comment field>	Enter your comment. This field appears if your user role can provide comments based on template setup. Rich text editor (RTE) support for comments and other long fields can be enabled for Fluid ePerformance on the ePerformance Installation - ePerformance Page. Visibility information is also shown, indicating if the feedback you provide is shared with the employee or the manager. If the rich text field has a character limit, and copying and pasting rich text content from an external source exceeds the maximum character limit of the field, try pasting the content as plain text to remove the underlying text formatting information that's included in the copied content, then reapply formatting as needed.
View Prior Steps Evaluation	Click to view the feedback that you entered in previous document steps for the section on the Prior Steps Evaluation page (EP_PRIOR_STEPS_SCF). This link appears if the document contains <i>Checkpoint</i> and <i>Finalize Criteria</i> steps and you have finished at least one of them.

Career Plan Summary

This section lists the career planning information for the employee. This section appears if it is included in the template setup. It is tied to the *Career Planning Summary* special processing and does not include any items. The section name is configurable in the template.

This section is applicable to the manager only.

Field or Control	Description
Risk of Leaving	Displays the risk of the employee leaving the current position, as specified on the Manage Career Plans page.
Impact of Loss	Displays the impact to the organization if the employee leaves the current position, as specified on the Manage Career Plans page.
Career Potential	Displays the career potential of the employee, as specified on the Manage Career Plans - Ranking/Potential page.
Official Career Path	Click to view the list of career moves made by the employee on a modal page. This information comes from the Manage Career Plans - Career Path page.
Manager Agreed Career Path	Click to view the list of manager-supported career moves made by this employee, as specified on the Manage Career Plans - Career Path page.
Personal Path	Click to view the personal career path that was created by this employee on a modal page. This information comes from 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.

Field or Control	Description
Update Employee Career Plan	Use this link to navigate to the Manage Career Plans component in Manager Self Service to perform necessary activities on the employee's most current career plan. This link appears if you (the logged-on user) are 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 "Manage Career Plans Component" (PeopleSoft Human Resources Plan Careers and Successions).

Overall Summary

Use the **Overall Summary** section to perform any of these tasks:

- View the overall feedback shared by the employee or the manager.
- (Manager only) View the overall feedback entered by participants, if applicable.
- Enter the overall feedback for the employee's performance as the manager or the employee.

This section appears if it is configured for your user role in the template setup. It is tied to the *Overall Summary* special processing and does not include any items. The section name is configurable in the template.

The look and feel of the **Overall Summary** section is the same as the section summary.

See Also [Performance Document Page \(Checkpoint or Finalize Criteria Step\)](#), (Section) Summary section.

(Fluid) Managing Participant Requests and Evaluations

This topic discusses how to manage participant requests and evaluations in Fluid.

Pages Used to Manage Participant Requests and Evaluations in Fluid

Page Name	Definition Name	Usage
Add/Review Participants Page	EP_APPR_NOM_FL	Add and track participant requests and evaluations.
Performance Document Page (Participant Evaluation) or Participant Evaluation Page	EP_MAIN_DOC_FL	Enter participant feedback or view completed participant evaluations for employees.

Understanding Participant Requests and Evaluations in Fluid

Fluid ePerformance and Classic ePerformance support the submission of participant requests, tracking of participant requests and evaluations, as well as completion and review of participant evaluations.

For more information about this functionality and what users can do, refer to the [Understanding the Nomination and Tracking Processes](#) topic.

Despite the common functionality shared between the two versions, Fluid ePerformance behaves differently from Classic ePerformance in these areas:

- Both the manager and the employee can submit participant requests if the option is enabled in the template setup.

In Classic ePerformance, only the manager or the employee can submit participant requests, but not both.

- Users can perform all tasks related to participant evaluations, such as adding participant requests, tracking their progress, and accessing completed participant evaluations, from a central location on the [Add/Review Participants Page](#).

In Classic ePerformance, these tasks are performed using separate pages.

Note: Oracle recommends that you finalize all section items needed for the document before submitting participant nominations. Once a request is accepted, the system creates an evaluation document for the participant to provide feedback. Any subsequent item updates from the main document will not be reflected in participant evaluations already created.

Anonymity for Participant Requests and Evaluations

Anonymity options are available in the template definition to control if the manager, employee, or both, have visibility to the identity of participants on the [Add/Review Participants Page](#):

- After requests are submitted.

This option resides in the **Nominate Participants** section of the template definition.

- After requests are accepted.

This option resides in the **Review Participant Evaluations** section of the template definition.

See Also [Template Definition - Process Page](#).

Anonymity for these situations is configured by participant roles that are defined in the system. For example, you can configure the system to mask the identity of *Peer* participants from employees after the requests are submitted, and *Colleague* participants from employees after the requests are accepted.

If anonymity is enabled to mask the participant identity in the document, the employee photo and specified project name are not displayed. The name of the participant is shown in this format: *<role name><sequence #>*, for example, Peer1, Other2.

In addition to masking participant identity on the Add/Review Participants page, anonymity rules are also applied throughout the document where participant feedback is displayed, such as section summaries, item details, and participant evaluations.

This table lists the statuses available for participant requests and evaluations, and the location of the anonymity options that are used to control the visibility of participant identity in the template.

<i>Request/Evaluation Status in Document</i>	<i>Location of Anonymity Options in Template</i>
New	Anonymity not applicable
Pending	Nominate Participants section
Declined	Nominate Participants
Withdrawn	Nominate Participants
Accepted	Review Participant Evaluations section
Evaluation in Progress	Review Participant Evaluations section
Completed	Review Participant Evaluations section
Canceled	Review Participant Evaluations section

Add/Review Participants Page

Use the Add/Review Participants page (EP_APPR_NOM_FL) to add and track participant requests and evaluations.

Navigation:

Click the **Add/Review Participants** icon in the header area of a document.

This example illustrates the fields and controls on the Add/Review Participants page.

Cancel

Participants

Done

Add / Review Participants

Save

Submit

Rosanna Channing

▼ Other

+

Maximum Available 4

**David Ho**
Senior Financial Analyst • New York NY

New



**Other1**

Pending



▼ Peer

+

Maximum Available 4

**Cynthia Adams**
Corporate Controller • New York NY

Completed



**Daryl Reese**
Financial Analyst • New York NY

Declined



This example illustrates the fields and controls on the Add/Review Participants page for the smartphone.

Cancel Participants Done

Save Submit

Add / Review Participants

Rosanna Channing

▼ Other +

Maximum Available 5

David Ho
Senior Financial Analyst • New York NY
New

⋮

✖

▼ Peer +

Maximum Available 4

Cynthia Adams
Corporate Controller • New York NY
Pending

⋮

The template setup controls who can add participant requests. This page title becomes **Review Participants** if your user role cannot add requests.

A collapsible section appears for each user role (for example, *Other* or *Peer*) that is available in the **Nominate Participants** section of the Template Definition - Process Page. Each section displays the minimum and maximum required requests defined for each role from the template setup, if the information is specified.

<i>Field or Control</i>	<i>Description</i>
Save	Click to save the page.
Submit	Click to submit participant requests that are in the <i>New</i> status. This button becomes available if new requests are available and your user role can submit participant requests.
	Click to look up and add individuals for the corresponding participant role from the person search modal page that appears. The system updates the maximum available and minimum required numbers automatically when requests are submitted, withdrawn, canceled, or declined.
<status>	Displays the status of the request. Values include: <i>Accepted:</i> Individual accepted the request. <i>Canceled:</i> Participant evaluation has been canceled by the manager. <i>Completed:</i> Participant completed the participant evaluation. <i>Declined:</i> Individual declined the request. <i>Evaluation in Progress:</i> Participant is working on the participant evaluation. <i>New:</i> Request is newly added or saved, not submitted. <i>Pending:</i> Request submitted. Individual has not responded to the request. <i>Withdrawn:</i> Request withdrawn by the submitter.
	Click to view the list of actions that are applicable to adding or reviewing participants and select an action to perform. See More Actions for Participant Reviews .
	Click to view the reason that the individual entered for declining the participant request, if available. Note: This icon is applicable to <i>Declined</i> requests, and is only visible to the user who submitted the request.

Field or Control	Description
	Click to enter a short description or title (60 characters maximum) on the modal page that appears to identify the project or task to which the participant evaluation pertains. This is useful when you want to invite people to provide feedback on different projects that the employee worked on during the review cycle. This icon is applicable to <i>New</i> requests.
	Click to delete the participant request. This icon is applicable to <i>New</i> requests.

Performance Document Page (Participant Evaluation) or Participant Evaluation Page

Use the Performance Document or Participant Evaluation page (EP_MAIN_DOC_FL) to enter participant feedback or view completed participant evaluations for employees.

Navigation:

- (Edit mode, employee only) Select a participant evaluation on the My Documents - Evaluations of Others Page.
- (Read-only mode, employee only) Select a *completed* participant evaluation on the My Documents - Evaluations of Others Page.
- (Read-only mode) Select *View Participant Evaluation* from the **More Actions** menu of a *completed* participant evaluation on the Add/Review Participants Page.

This is an example of the Performance Document page that appears when you select a participant evaluation on the Performance - Evaluation of Others page. The page display is controlled by its template setup for the participant's role. Participants have a smaller set of actions available to them in participant evaluations compared to the manager or the employee.

Performance Document

Evaluation in Progress


John Patterson
Manager-Revenue • 1 Jan - 31 Dec 2024

Instructions

Enter ratings and comments for each section in this evaluation, if applicable. At any point in time you can save this evaluation by selecting the Save button.

Peer Evaluation

Complete

Goals

Section Weight 0 % • Evaluation visible to Employee, Manager

Promote Business Growth

No Due Date • Weight 50%

Produce High Quality Financial Reports

No Due Date • Weight 50%

Summary

Participant

Cynthia Adams

☆☆☆☆☆ Your rating is mandatory.

Type comment here...

This is an example of the Participant Evaluation page, which displays the completed participant evaluation of an employee that you selected on the Add/Review Participants page. Few actions are available on this read-only document, such as Notify, Print, and open items.

Participant Evaluation

Completed



John Patterson

Manager-Revenue • 1 Jan - 31 Dec 2024

Goals

Section Weight 0 % • Evaluation visible to Employee, Manager

Promote Business Growth

No Due Date • Weight 50% • Meets Expectations

Produce High Quality Financial Reports

No Due Date • Weight 50% • Meets Expectations

Summary

Competencies

Summary

Participant



Cynthia Adams

4-Very Good Numeric Rating 4.00

John met the expectation of all competencies.

Overall Summary

Participant



Cynthia Adams

★★★★☆ Exceeds Expectations • Numeric Rating 4.00

John did very well this year.

Related Links

[Performance Document Page \(Evaluation Step\)](#)
[\(Fluid\) Working With ePerformance Documents](#)

(Fluid) Updating Evaluations

This topic discusses how to update evaluation details in Fluid.

Pages Used to Update Evaluations in Fluid

Page Name	Definition Name	Usage
Performance Document Page (Evaluation Step)	EP_MAIN_DOC_FL	Enter final feedback for employees.

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Page Name	Definition Name	Usage
<u>Self-Evaluation - <Status> Page</u>	EP_MAIN_DOC_FL	View completed employee evaluations.
<u>Select/Create Items Page</u>	EP_ADD_ITEM_SCF	Add items to document sections.
<u>Select/Create Items - Pre-defined Page</u>	EP_ADD_ITEM_SCF	Add pre-defined items to document sections.
<u>Select/Create Items - Your Own Page</u>	EP_ADD_ITEM_SCF	Add items that you create manually to document sections.
<u>Select/Create Items - Business Objectives Page</u>	EP_ADD_ITEM_SCF	Add items from business objectives to document sections.
<u>Select/Create Items - Manager Document Page</u>	EP_ADD_ITEM_SCF	(Employee only) Add items from your manager's documents to document sections.
<u>Select/Create Items - My Document Page</u>	EP_ADD_ITEM_SCF	Add items from the manager's or employee's own documents to document sections.
<u>Select/Create Items - Team Document Page</u>	EP_ADD_ITEM_SCF	(Manager only) Add items from your team's documents to document sections.
<u><Section Name> in List Page</u>	EP_MAIN_ADDITM_SCF	View or remove items from the document section.
<u>Details Page</u>	EP_MAIN_OINFO_SCF	View additional information of the item.
<u>Performance Document Item Page</u>	EP_MAIN_B_ITMED_FL	View or update item details.
<u>Alignment Chain Page</u>	EPO_ALIGN_CHN_SCF	View the alignment of the current objective with its corporate or departmental objectives in the organization.
<u>Sub-Items Page</u>	EP_MAIN_ADDSUB_SCF	Add pre-defined sub-items to items.
<u>My Notes Page</u>	EP_MAIN_NOTES_SCF	Add, update or delete notes.
<u>Quick Evaluation Page</u>	EP_QUIK_EVAL_SCF	Enter or view feedback for individual items.
<u>Exclude Item Ratings Page</u>	EP_ITEM_EXCLUDE_SCF	Select items or sub-items to be excluded from overall rating calculation.

<i>Page Name</i>	<i>Definition Name</i>	<i>Usage</i>
<u>Exclude Rating Page</u>	EP_ITEM_EXCLUDE_SCF	Select the corresponding item or sub-items to be excluded from overall rating calculation.
<u>Excluded Items Page</u>	EP_ITEM_EXCLUDE_SCF	View items and sub-items that are excluded from the overall rating calculation.
<u>Notify Page</u>	EP_EMAIL_NOTIFY_FL	Send messages about the document.
<u>Rating History Page</u>	EP_HDR_RATING_SCF	View past overall rating information for the employee for the same document type, if available.
<u>360 Graphical View Page</u>	EP_360_REPORT	View ratings from all evaluators and the calculated average rating for each section, item and sub-item of the document.
<u>Last Updated Page</u>	EP_AUDIT_SCF	View the audit information of documents or items.
<u>Performance Process Overview Page</u>	EP_APPR_HELP_SCF	View the description and objective of each step in the performance process.
<u><Section or Item> Weight Page</u>	EP_SECT_WEIGHT_SCF	Update document section (or item) weights.
<u>Reorder Items Page</u>	EP_MAIN_REORD_SCF	Change the order of items displayed in document sections.
<u><Section> Page (Delete Multiple Items)</u>	EP_ITEM_SELECT_SCF	Remove one or more items from document sections.
<u>Average Ratings Page</u>	EP_AVG_CHART_SCF	View ratings from all evaluators in a horizontal bar chart.
<u>Copy to Other Documents Page</u>	EP_APPR_SEL_CPY_FL	Copy individual items to other employees' documents.
<u>Rating Model Page</u>	EP_RTGMDL_POPUP_FL	View descriptions of the rating values that are available in the rating model.
<u>Add/Review Participants Page</u>	EP_APPR_NOM_FL	Add and track participant requests and evaluations.

Understanding Evaluations Data Entry in Fluid

Fluid ePerformance and Classic ePerformance support the same process for updating evaluations in the *Evaluation* step. For more information about this step and what users can do, refer to the [Understanding Evaluation Data Entry](#) topic.

Despite the common functionality shared between the two versions, Fluid ePerformance behaves differently from Classic ePerformance in these areas:

- Both the manager and the employee can be configured to provide mandatory ratings and comments in sections and items in the *Evaluation* step if the options are enabled for their roles in the template setup. When comments are required, the minimum character information is displayed near the comments box to remind users of the character count needed to save their comments.

In Classic ePerformance, these options are not supported.

- The Stars rating model.

Users can provide ratings using the stars rating model.

In Classic ePerformance, this option is not supported.

- The manager can always see the employee's rating and comment of a section or its items in the manager document in the corresponding section, when the employees shares the information with the manager.

In Classic ePerformance, these values appear if the **Employee Rating** and **Employee Comments** options are selected at the section and item levels for the *Manager* role for the corresponding section.

- Reopening "sub-steps" within the *Evaluation* step.

Depending on the review process for which the document was created, one or more sub-steps become available to guide you through each task in the final evaluation, such as *Evaluation in Progress*, *Shared with Employee*, and *Pending Acknowledgement*. These sub-steps are also statuses in which documents are categorized on a document list and can be used as filters. They are displayed on document pages as tag values.

A prior sub-step can be reopened for updates as needed. If you move to the current sub-step and have not made any changes, you can reopen the prior sub-step from the **More Actions** menu that is located at the step level.

In Classic ePerformance, additional conditions are also considered.

Performance Document Page (Evaluation Step)

Use the Performance Document page (EP_MAIN_DOC_FL) to enter final feedback for employees.

Navigation:

Select a document from the **Evaluation in Progress**, **Shared with Employee**, **Pending Acknowledgment**, **Acknowledged**, **Approval**, **Completed**, or **Canceled** section of a document list (Team Documents, Delegated Documents, or My Documents).

This is an example of the Performance Document page in the Evaluation step (1 of 4).

Performance Document

Evaluation in Progress

Preliminary Rating: Exceeds Expectations

**Rosanna Channing** 

Senior Accounting Manager • 1 Jan - 31 Dec 2025 



> Instructions

Step 4 of 4

Evaluation 

Share with Employee 

 Rosanna cannot see the evaluation until you share the document.

Other Participants

Netty Owyang - Manager-Finance, Cynthia Adams - Officer-Loan

Goals  

Enter ratings and comments for each goal listed, if applicable.

Section Weight 0 %

 **Develop New Business Relationships** 

No Due Date • Meets Expectations **Rating Excluded**  

 **Demonstrate Customer Respect and Loyalty** 

No Due Date  

Summary

Employee

**Rosanna Channing**

★★★★☆ Exceeds Expectations

I exceeded the expectation of all goals this year.

This is an example of the Performance Document page in the Evaluation step (2 of 4).

Participants



Netty Owyang

Exceeds Expectations

Rosanna exceeded expectation of all goals



Cynthia Adams

Exceeds Expectations

Rosanna exceeded the expectation of all goals.

Manager



Betty Locherty

☆☆☆☆☆

Your rating is mandatory.

Calculate

?

↶↷

A² A! A A

B I U

≡ ≡ ≡

≡ ≡ ≡

≡ ≡ ≡

Type comment here...

Writing Tools

Comments are required with a minimum of 10 characters.

Rosanna cannot see your evaluation

View Prior Steps Evaluation

View Graphical Rating

View Excluded Ratings

> Competencies

> Summary

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This is an example of the Performance Document page in the Evaluation step (3 of 4).

> Career Plan Summary

✓ Recognition Summary

Use the Recognition Summary section to add or view employee recognitions to the document.

Author	Cynthia Adams	Recognition Text	It's truly wonderful to have worked with talents like you in the past few months.	
Job Title	Corporate Controller			
Date Sent	01/29/2025			

 [View Recognitions](#)

✓ Overall Summary

Enter the final rating and/or comments for this employee.

Employee



Rosanna Channing
★★★★☆ Exceeds Expectations

I exceeded all goals and comps successfully this year.

Participants



Netty Owyang
Exceeds Expectations

Rosanna did wonderfully this year.



Cynthia Adams
Exceeds Expectations

Rosanna did great this year.

This is an example of the Performance Document page in the Evaluation step (4 of 4)

Manager


Betty Locherty

☆☆☆☆☆
Your rating is mandatory.

↶

↷

A
▼

A
▼

A
▼

A
▼

B

I

U

:
=

:
=

:
=

▼

Type comment here...

Writing Tools

Comments are required with a minimum of 10 characters.

Rosanna cannot see your evaluation

View Prior Steps Evaluation
View Graphical Rating
View Excluded Ratings

Employee Comments

After review with their manager, the employee will add their comments.

Employee


Rosanna Channing

Manager Comments

After review with the employee, the Manager adds their final comments.

Manager


Betty Locherty

Note: The fields and controls that appear in a document is controlled by its template, which is highly configurable. The sample document used in this topic is for demonstration purposes only, and is likely to look different from your implementation.

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Field or Control	Description
	Displays the current status of the document in the review process. Valid values for the <i>Evaluation</i> step are: <i>Evaluation in Progress</i> <i>Shared with Employee</i> <i>Shared with Manager</i> <i>Request Acknowledgment</i> <i>Pending Acknowledgement</i> <i>Acknowledged</i> <i>Approval</i> <i>Canceled</i> <i>Completed</i>: The final review rating appears next to this tag for completed documents. You can filter documents from document lists (for example, Team Documents - Team Documents Page) using one or more of these document statuses. Documents are not editable (except for adding final manager or employee comment if enabled in the template setup) if they are in any of these statuses, excluding <i>Evaluation in Progress</i>. Note: See the Document Statuses during Review and Approval topic for more information about when you can view or edit document data, what actions can be performed, and what page controls are available in these document statuses.
Self Evaluation <Evaluation Status>	(Employee only) This text displays the current status of the employee's self-evaluation: <i>Not Started</i>, <i>In Progress</i>, <i>Canceled</i>, or <i>Completed</i>.

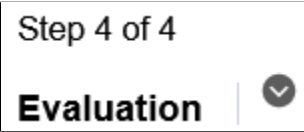
Instructions

This section displays user instructions for the current document step. Instructions are text catalog entries. The content can be different based on the document usage, the role of the logged-in user, and the current document step.

It appears when the **View Instructions** field is set to *Display in Modal Window* in the document's template definition.

See [Template Definition - General Page](#).

Step Information and Actions

Field or Control	Description
	Displays the step of the review process that the document is currently in. Select the icon to expand the popup menu and view the overall progress of the document in the review process. The popup menu displays the list of steps (and due dates) that are available in the review process, based on the associated template. The steps shown may or may not be entirely applicable to the user who is viewing the list. The list provides a quick update of where you are in the review process. It shows the current step (name appears in bold font), previous steps that were done (<i>Completed</i> or <i>Skipped</i>), and remaining steps to be worked on (<i>Not Started</i>). You can select a previous step to view the last-updated and read-only version of the document in that step. Some actions are still available for you to drill down and view the content of the document, such as item details, ratings and comments, and notes. However, you can no longer edit the document.
Acknowledge	(Employee only) Click this button 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 review with the employee, and an acknowledgement request has been sent.
Complete	Click this button to finish the employee self-evaluation or manager evaluation.
Override Acknowledgement	(Manager only) Click this button to cancel the acknowledgement request that was sent to the employee. This button is typically used only 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 <i>Acknowledged</i>. This button displays (in manager evaluation) if the review process selected in the template of this document requires review with the employee, and an acknowledgement request has been sent.

Field or Control	Description
Request Acknowledgement	(Manager only) Click this button to send a request to ask the employee for an acknowledgment that they have 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 review with the employee.
Share with Employee	(Manager only) Click this button to share the manager's ratings and comments for the employee's evaluation with 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 review with the employee, and you have entered all required information. Once the document is shared with the employee, the action cannot be undone. Note: In the evaluation phase, if the manager shares the document with the employee, who has not yet completed their own self-evaluation, the self-evaluation will be canceled automatically.
Submit for Approval	(Manager only) Click this button to submit the evaluation to the designated approver according to the approval rules. If the manager has multiple jobs, the job list appears on a modal page. Select the appropriate job to use for this approval request. This button is available (in manager evaluation) if the review process selected in the template of this document requires approval.
	Click to view the list of actions that are applicable to the current step and select an action to perform. The list of actions varies based on a few factors, such as the template setup, the current step of the document, and your user role. See Step-Level More Actions.
<Feedback visibility>	This text (in yellow background if applicable) indicates whether the employee can see your feedback as the manager, and vice versa. Use the action button to share your evaluation details.

Document Errors

After you have selected the action button on the document page, this section appears if errors are found by the validation check performed for the current document step. It displays error messages that need to be addressed before proceeding to the next action. Some of the step-specific errors include:

- Document is not shared with the employee or the manager.
- Section weightings are required but not specified.
- Item weightings are required but not specified.
- Section, item, or sub-item ratings are required but not entered.
- Section or item comments are required but not entered.
- Minimum comment length is not met.

<i>Field or Control</i>	<i>Description</i>
Run Error Check or Rerun Error Check	Select to run validation checks on the document. Select an error row and fill out the requested information on the modal page that appears. After updating and closing the modal page, the validation runs automatically and removes the fixed row or rows from the list. Note: When you fix the reported errors by updating the document directly rather than going through the modal pages from the list, the validation does not occur automatically. In this case, use the Rerun Error Check button or the action button to validate the document manually.

Other Participants

This section lists the participants who provided feedback in this document and is applicable to the manager only.

It appears if the **Display Names in Mgr Doc** option for a participant role is selected in the template setup.

Completed participant evaluations are available for review on the Add/Review Participants page, if you have the permission to view the information.

<Section Name>

See Also [Performance Document Page](#), <Section Name> section.

Field or Control	Description
	Click to add items to the section on the Select/Create Items Page. This action is available if your role can add items in the current step based on the template setup. If your document is in the <i>Evaluation</i> step, this icon is available only if it is in the <i>Evaluation in Progress</i> document status. Note: If the manager adds an item to the document in the Evaluation step, the same item needs to be added to the self-evaluation as well. Similarly, when an item is added to the self-evaluation, the same must be done to the manager document so that the list of items is synchronized in both documents.
	Click to view the list of actions that are applicable to the section and select an action to perform. The list of actions varies based on a few factors, such as the template setup, the current step of the document, and your user role. See Section-Level More Actions. Note: The More Actions menu is not available to sections that cannot be weighted or cannot have items, for example, Career Plan Summary, Employee Comments, Manager Comments, Overall Summary, Signatures and eSignatures.
Section Weight <number> %	Displays the weight of the section in percentage. The total weight of all weighted sections in a document is 100%. Click this link to update the section weight on the Section Weight page. This link appears if the section can be weighted based on the template setup. See <Section or Item> Weight Page.
<Item title>	Click to access the item on the Performance Document Item Page in read-only mode.
	Indicates the number of sub-items added to the corresponding item.

Field or Control	Description
	Click to view notes for the item on the My Notes Page. This icon appears if notes were added to the item.
 or 	Click to view existing or add new feedback for the corresponding item (and sub-items if applicable) on the Quick Evaluation Page. This icon appears if your role can perform <i>any</i> of these actions based on the template setup: • Rate items or sub-items in the current step • Enter item comments in the current step
	Click to view the list of actions that are applicable to the item and select an action to perform. The list of actions varies based on a few factors, such as the template setup, the current step of the document, and your user role. See Item-Level More Actions.

(Section) Summary

Click the **Summary** link of a section to expand the area and perform any of these tasks:

- View section feedback shared by the employee or the manager.
- (Manager only) View section feedback entered by participants, if applicable.
- Enter your section feedback.

Note: When the document is in the *Evaluation* step and is shared, the section feedback you entered is read-only.

A section summary appears if your role is configured in the template setup to perform any of the listed tasks. If a role (for example, peer) does not have permission to provide feedback in a section summary, or you do not have permission to view the information, the feedback (or the subsection) for that role within the section summary is not shown.

Field or Control	Description
<Rating display>	Use the star or drop-down box rating display to provide rating. The corresponding rating description is displayed. (<i>Evaluation</i> step only) The system displays both the rating description and the corresponding numeric rating (or rating points, based on the selected calculation method) when a rating is selected. This rating display appears if your role can rate sections in the current step based on the template setup. (<i>Evaluation</i> step only) If the Calculate Ratings option is enabled in the template setup but you do not have the permission to override ratings, you cannot update the system-calculated rating directly from the display. To change a system-calculated rating in this scenario, you need to modify the ratings that are used to derive that system-calculated rating. For example, to change a section summary rating, modify one or more of its item ratings.

Field or Control	Description
 or Calculate	Click for the system to perform roll-up calculation on the rating for the corresponding: • Item, in which all of its sub-items that have ratings are considered in the calculation. Or • Section summary, in which all of its items, with or without ratings, are considered in the calculation. Or • Overall summary, in which all rate-enabled section summaries, with or without ratings, are considered in the calculation. Sections that cannot be rated are excluded from the calculation. The manager can select sub-items or items to be excluded from their item rating or section rating calculations respectively using the <i>Exclude Item Ratings</i> section-level action or <i>Exclude Rating</i> item-level action, if enabled in the template setup. For more information, refer to Understanding Exclusion of Items in Calculated Rating. The system performs rating calculations when you save the page as well. This icon is applicable to the <i>Evaluation</i> step only. This icon appears if the Calculate Ratings check box is selected on the Template Definition - Process Page. The <i>Rating Calculated</i> text is shown near the rating display to indicate that the displayed rating is system-calculated. Ratings can be overridden if this option is enabled for your role in the template setup. If you override a system-calculated rating by selecting a different value in the rating display, the <i>Rating Overridden</i> text is displayed. Click the Calculate Rating icon again if you want to replace the existing rating with a system-calculated value.
	Click to view rating descriptions of the associated rating model. This icon is available near a rating display. See Rating Model Page.

Field or Control	Description
<Comment field>	Enter your comment. This field appears if your user role can provide comments based on template setup. Rich text editor (RTE) support for comments and other long fields can be enabled for Fluid ePerformance on the ePerformance Installation - ePerformance Page. (<i>Evaluation</i> step only) The minimum character count information is displayed, if comment is required for the current step and a minimum character count is specified in the template setup. Visibility information is also shown, indicating if the feedback you provide is shared with the employee or the manager. If the rich text field has a character limit, and copying and pasting rich text content from an external source exceeds the maximum character limit of the field, try pasting the content as plain text to remove the underlying text formatting information that's included in the copied content, then reapply formatting as needed.
Writing Tools	(<i>Evaluation</i> step only) Click to choose suggested texts as review comments from Writing Tools. See Writing Suggestions - All Page. This link appears below the comment field if one or more Writing Tools options are selected for your role on the Template Definition - Process Page.
View Prior Steps Evaluation	Click to view the feedback that you entered in previous document steps for the section on the Prior Steps Evaluation page (EP_PRIOR_STEPS_SCF). This link appears if the document contains <i>Checkpoint</i> and <i>Finalize Criteria</i> steps and you have finished at least one of them.
View Graphical Rating	(<i>Evaluation</i> step only) Click to view the display of ratings provided by all users in a horizontal bar chart on the Average Ratings Page. This link appears after the document is shared, if the View Average Ratings check box is selected for your role on the Template Definition - Process Page.

Field or Control	Description
View Excluded Ratings	(<i>Evaluation</i> step only) Click to view the list of items and sub-items that the manager excluded from the overall rating calculation of the document on the Excluded Items Page. This link appears at the footer of a section summary and the Overall Summary section, if any section item or sub-item has been excluded. It is also visible to the employee after the document is shared.

Career Plan Summary

This section lists the career planning information for the employee. This section appears if it is included in the template setup. It is tied to the *Career Planning Summary* special processing and does not include any items. The section name is configurable in the template.

This section is applicable to the manager only.

Field or Control	Description
Risk of Leaving	Displays the risk of the employee leaving the current position, as specified on the Manage Career Plans page.
Impact of Loss	Displays the impact to the organization if the employee leaves the current position, as specified on the Manage Career Plans page.
Career Potential	Displays the career potential of the employee, as specified on the Manage Career Plans - Ranking/Potential page.
Official Career Path	Click to view the list of career moves made by the employee on a modal page. This information comes from the Manage Career Plans - Career Path page.
Manager Agreed Career Path	Click to view the list of manager-supported career moves made by this employee, as specified on the Manage Career Plans - Career Path page.

Field or Control	Description
Personal Path	Click to view the personal career path that was created by this employee on a modal page. This information comes from 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	Use this link to navigate to the Manage Career Plans component in Manager Self Service to perform necessary activities on the employee's most current career plan. This link appears if you (the logged-on user) are 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 "Manage Career Plans Component" (PeopleSoft Human Resources Plan Careers and Successions).

Recognition Summary

This section lists the employee recognitions that were added to the document. This section appears if it is included in the template setup. It is tied to the *Recognition Summary* special processing, cannot be rated, and does not include any items. The section name is configurable in the template.

See [Understanding Recognitions in Performance Documents](#).

Field or Control	Description
	Select to remove added recognition posts from the document.
View Recognitions	Select to view or insert employee recognitions to the document on the "View Recognitions Page" (Application Fundamentals).

Overall Summary

Use the **Overall Summary** section to perform any of these tasks:

- View the overall feedback shared by the employee or the manager.
- (Manager only) View the overall feedback entered by participants, if applicable.
- Enter the overall feedback for the employee's performance as the manager or the employee.

This section appears if it is configured for your user role in the template setup. It is tied to the *Overall Summary* special processing and does not include any items. The section name is configurable in the template.

The look and feel of the **Overall Summary** section is the same as the section summary.

Employee Comments

This section appears if it is configured in the template setup for the employee to enter any final comment after reviewing the manager evaluation that is shared by the manager. It is tied to the *Employee Comments* special processing and does not include any items. The section name is configurable in the template.

Manager Comments

This section appears if it is configured in the template setup for the manager to enter any comment after sharing and discussing the manager evaluation with the employee. It is tied to the *Manager Comments* special processing and does not include any items. The section name is configurable in the template.

Approval Monitor

This section provides approval information about the document, such as the status of the approver in the approval chain and approver information.

This section appears if the document has been submitted for approval. It is available to the manager only.

See Also [Approving Documents Using Fluid Approvals](#).

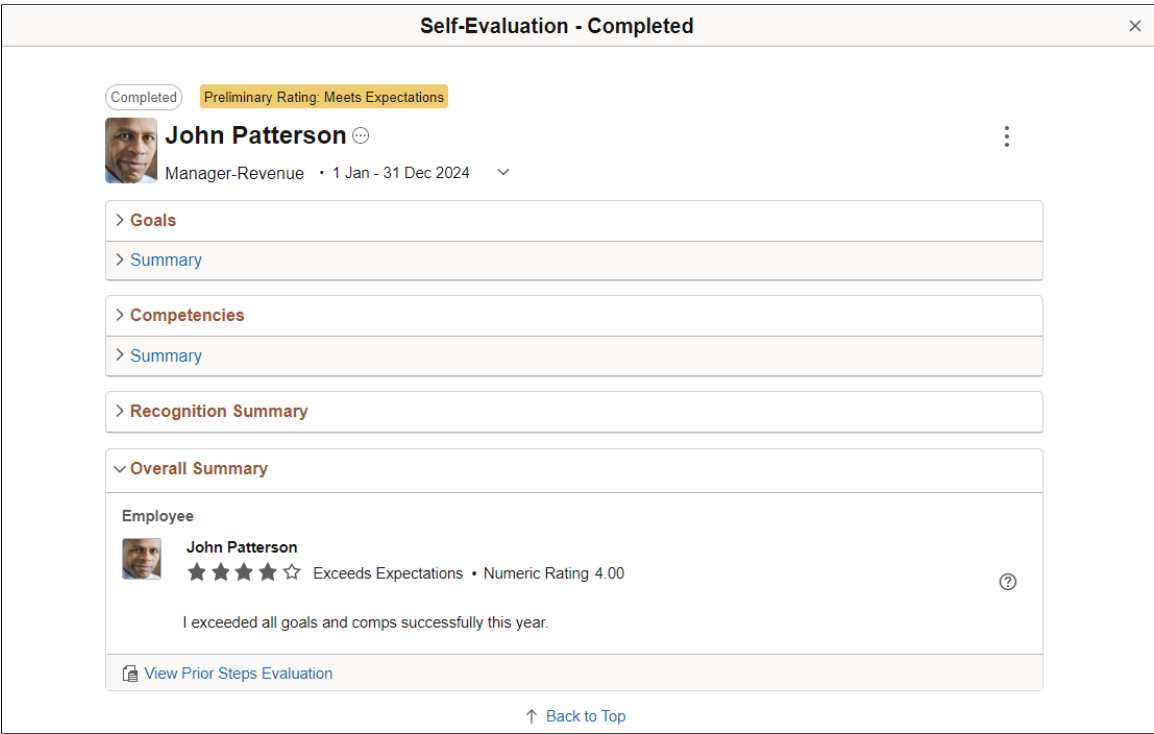
Self-Evaluation - <Status> Page

(Manager only) Use the Self-Evaluation - <Status> page (EP_MAIN_DOC_FL) to view completed employee evaluations.

Navigation:

Select *View Employee Evaluation* from the **More Actions** menu of the *Evaluation* step in a document.

This is an example of the Self-Evaluation - <Status> page.



Note: This page is applicable to the manager only.

(Fluid) Working With Performance Notes

This topic provides an overview of Fluid Performance Notes feature and discusses how to create and manage performance notes.

Pages Used to Work With Fluid Performance Notes

Page Name	Definition Name	Usage
<u>Configure Performance Notes Page</u>	EP_NOTE_SRCH_FL	Specify setup options for using performance notes by role.
<u>Performance Notes Tile</u>	-	Access the list of performance notes for team members.
<u>My Performance Notes Tile</u>	-	Access the list of performance notes as the employee.
<u>Performance Notes Page or My Performance Notes Page (Note List)</u>	EP_NOTE_SRCH_FL	Create or manage performance notes.

Page Name	Definition Name	Usage
Add Note Page	EP_NP_NOTE_SCF	Create new performance notes.
Performance Notes Page or My Performance Notes (Note Details)	EP_NOTE_FL	Review note details.
Update Note Page	EP_NP_NOTE_SCF	Edit note details.

Understanding Fluid Performance Notes

Both managers and employees can record notes about the performance and accomplishments of their team members and themselves.

These notes, or performance notes, can be:

- General remarks about an employee (standalone notes), or
- Remarks that are specific to documents of an employee.

Performance notes can be created and managed in two ways:

- Using the [Performance Notes Tile](#) delivered on the Team Performance dashboard for managers, or the [My Performance Notes Tile](#) delivered on the Performance dashboard for employees.

When users add new notes using fluid tiles, the system provides a list of users' documents with which they can associate the notes.

- From documents at the header level, section level, and item level using the *Notes* action.

Performance notes can be created in any document status, as long as the document is not read-only.

Notes can be used as writing suggestions in the Writing Tools feature as users enter evaluation comments. Standalone notes are not supported in Writing Tools.

Users can enter performance notes in rich text format.

Note: Notes are only visible to the users who added them or to whom the notes were transferred.

The administrator uses the [Configure Performance Notes Page](#) to control what managers and employees can do with their notes (transfer or delete notes), and where they can add and manage notes from within documents.

Video: [Image Highlight, PeopleSoft HCM Update Image 52: Fluid Performance Notes](#)

Transferring Documents in Manager Self-Service

When the manager transfers one or more team documents to a new manager on the [Transfer Documents Page \(Team Performance\)](#), they have the option to review associated document notes and select to transfer notes together with their documents.

Note: If notes are linked to documents, they cannot be transferred by themselves and have to be transferred with their documents.

If the manager transfers a document manually and does not select document notes to be transferred together with the document, the system removes the document information from the notes that weren't transferred and moves them to the **Historical Notes** section of the [Performance Notes Page](#) or [My Performance Notes Page \(Note List\)](#).

Automatic Document Transfer

When in-progress documents are transferred to a new manager using the Automatic Document Transfer feature, associated notes are ignored and not transferred with their documents.

See Also [Working With Automatic Document Transfer](#).

Performance Notes Notifications

The system supports the delivery of notifications for note transfer using Notification Composer.

It sends out notifications to alert new note owners when:

- Notes are transferred to them from a manager or employee.
- Documents and their linked notes are transferred to them from a manager.

Users can select a notification entry or link to access the corresponding note on the My Performance Notes page (EP_NOTE_FL) in read-only mode.

Managed in Notification Composer, users may be able to personalize how (for example, email, in-app, and text) they receive these notifications from My Preferences > Notifications, as configured by the system administrator.

See also “Understanding Notification Composer” (Enterprise Components).

Video: [Notification Composer in PeopleSoft HCM](#)

Setting Up Fluid Performance Notes

Here are the high-level steps for setting up the Fluid Performance Notes feature:

1. Review the setup options on the [Configure Performance Notes Page](#) and update as needed.
2. Review and ensure that the system-delivered setup are in place on the [Fluid Popup Menu Setup Page](#) to support where notes can be added or viewed in documents, and which note actions are available to users (managers and employees). This setup includes:
 - a. The *Notes* action at the header, section, and item levels of documents (application: *ePerformance*).
 - b. Actions that are available for managing performance notes (application: *Performance Notes*).

Performance Note and Document Configuration Examples

Setup options are available to control where users can add or view notes in documents, and whether notes can be transferred or deleted.

Performance notes can be inserted and maintained (for example, view and update) in different levels of a document based on these options on the [Configure Performance Notes Page](#):

- **Document Notes** - Enables users to add and maintain notes for documents at the document header level.
- **Section Notes** - Enables users to add and maintain notes for sections, as well as maintain notes for documents.
- **Item Notes** - Enables users to add and maintain notes for items, as well as maintain notes for sections and documents.

Note: To enable notes to be created and updated from documents, at least one of these options must be selected. If none are selected, the Performance Notes functionality is not available in documents. However, users can still create and maintain notes using the [Performance Notes Tile](#) and [My Performance Notes Tile](#).

By default, all three options are enabled for the *Manager* and *Employee* roles.

This table provides configuration examples for performance notes.

Setup Option	Example 1	Example 2	Example 3	Example 4	Example 5
Document Notes	Selected	Selected	Selected		
Section Notes	Selected			Selected	
Item Notes	Selected	Selected			Selected

This table lists the expected behavior of the configuration examples for performance notes.

Behavior	Example 1	Example 2	Example 3	Example 4	Example 5
Level where users can maintain notes	• Document header • Section • Item	• Document header • Section • Item	Document header	• Document header • Section	• Document header • Section • Item

Behavior	Example 1	Example 2	Example 3	Example 4	Example 5
Level where users can add notes	- Document header - Section - Item	- Document header - Item	Document header	Section	Item

User Roles

Users need to be members of these roles to set up or use the Performance Notes functionality:

- (Administrator) *ePerformance Setup*
- (Manager) *Fluid Dashboard - MSS ePerf* and *ePerformance Manager Fluid*
- (Employee) *Fluid Dashboard - ESS ePerf* and *ePerformance Employee Fluid*

Configure Performance Notes Page

Use the Configure Performance Notes page (EP_NP_CONFIG_FL) to specify setup options for using performance notes by role.

Navigation:

Select the [Performance Management Tile](#) to open the Performance Management application start page, and select **Performance Notes** from the navigation collection.

This example illustrates the fields and controls on the Configure Performance Notes page.

Configure Performance Notes

Configure Performance Notes

Save

Configure Options by Role

User Role	Document Notes	Section Notes	Item Notes	Allow Transfers	Allow Deletions	Retain Deleted Notes
Employee	☒	☒	☒	☒	☒	☐
Manager	☒	☒	☒	☒	☒	☐

Field or Control	Description
Document Notes	Select for the role user to be able to create and maintain general notes for documents, using the <i>Notes</i> action that appears in the document-level More actions menu of documents.
Section Notes	Select for the role user to be able to create and maintain notes for sections, using the <i>Notes</i> action that appears in the section-level More actions menu of documents.

Field or Control	Description
Item Notes	Select for the role user to be able to create and maintain notes for items, using the <i>Notes</i> action that appears in the item-level More actions menu of documents.
Allow Transfers	Select for the role user to be able to transfer their notes to other individuals. When selected, the <i>Transfer To</i> action appears in the More actions menu of notes. If a document contains notes, a note count link appears when the document is selected to be transferred on the Transfer Documents Page (Team Performance).
Allow Deletions	Select for the role user to be able to delete their notes. When selected, the <i>Delete</i> action appears in the More actions menu of notes.
Retain Deleted Notes	Select for deleted notes to be displayed on note list pages for auditing purposes. This option becomes editable when the Allow Deletions option is enabled. It is cleared by default. If this option is selected, and a note is deleted from the My Notes Page or Performance Notes page, the system displays the deleted note with the word <i>[Deleted]</i> prepended to the note subject in the Historical Notes section on the Performance Notes Page or My Performance Notes Page (Note List). Deleted notes are read-only. If this option is cleared, deleted notes are removed and not displayed on any page.

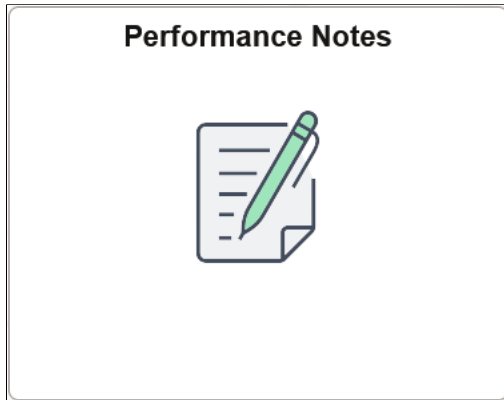
Performance Notes Tile

(Manager) Use the Performance Notes tile to access the list of performance notes for team members.

Navigation:

The **Performance Notes** tile is located on the [Team Performance Dashboard](#).

This example illustrates the Performance Notes tile.



See [Performance Notes Page](#) or [My Performance Notes Page \(Note List\)](#).

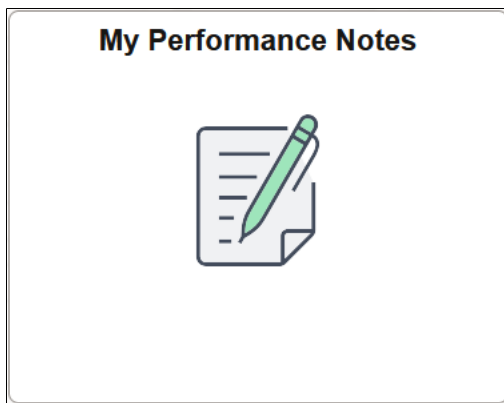
My Performance Notes Tile

(Employee) Use the My Performance Notes tile to access the list of performance notes as the employee.

Navigation:

The **My Performance Notes** tile is located on the [Performance Dashboard](#).

This example illustrates the My Performance Notes tile.



See [Performance Notes Page](#) or [My Performance Notes Page \(Note List\)](#).

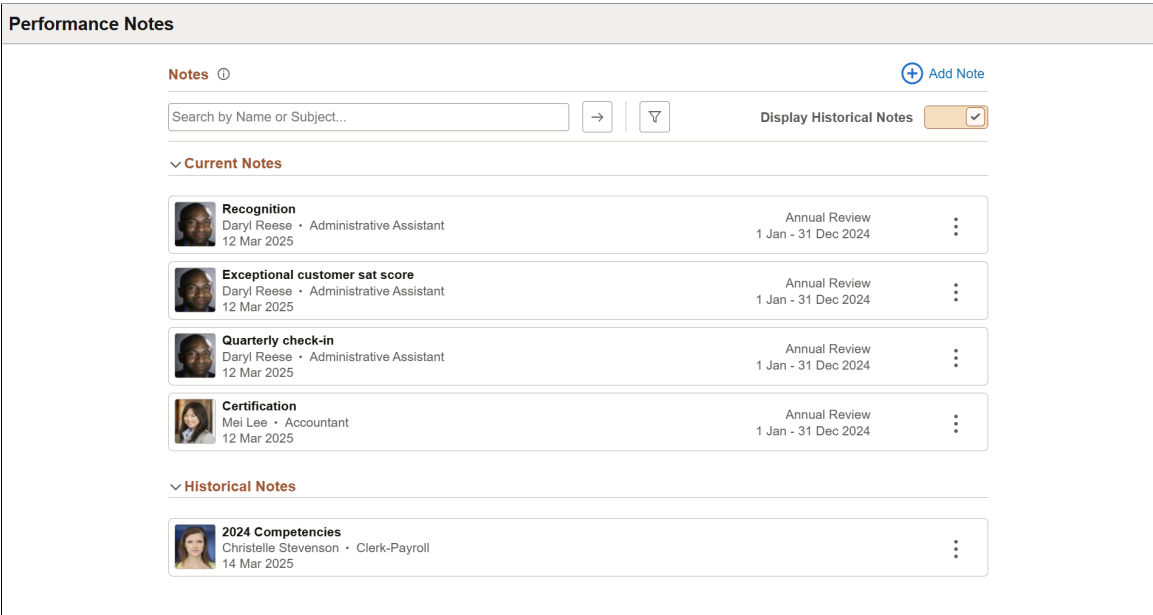
Performance Notes Page or My Performance Notes Page (Note List)

Use the Performance Notes page or My Performance Notes page (EP_NOTE_SRCH_FL) to create or manage performance notes.

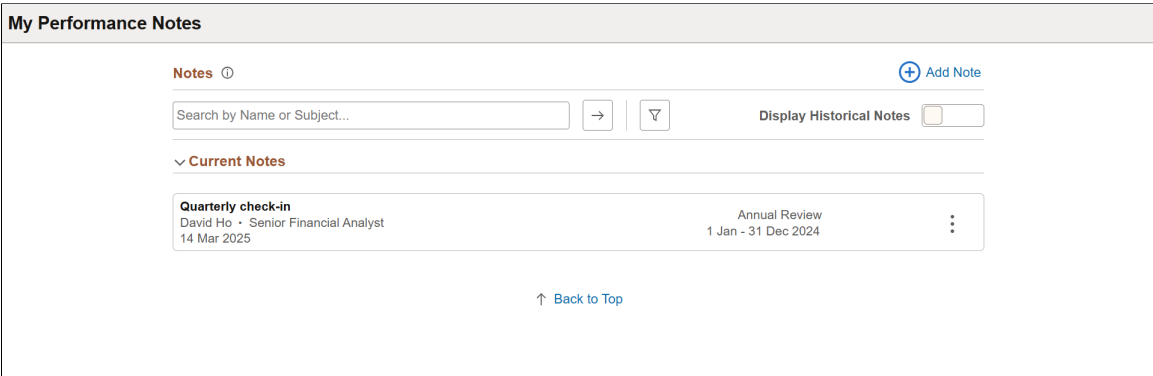
Navigation:

Select the **Performance Notes** tile or **My Performance Notes** tile.

This example illustrates the fields and controls on the Performance Notes page that displays notes for your team members.



This example illustrates the fields and controls on the My Performance Notes page that displays your own notes as the employee.



The Performance Notes page displays performance notes that were created by you for team members as the manager.

The My Performance Notes page displays performance notes that were created by you as the employee.

You can refine the list by specifying keywords for note subject or employee name, and filter notes by creation date range, and document type.

Each card on the list displays general information about the note, such as subject, employee for whom the note was created, employee job title, and creation date. If the note was created for a document, the document with its review period is also shown.

Employee photo is not displayed on the My Performance Notes page.

Notes

Field or Control	Description
	Select to view the instructional text for searching, adding, and maintaining notes on the Performance Notes page. The text can be modified in Text Catalog if needed (text ID: EP_NOTE_SEARCH_FL).
Add Note	Select the link to create performance notes on the Add Note Page .
<search field>	Enter partial (using % as the wildcard character) or whole keywords to search for performance notes by note subject or employee. Note: Numbers and special characters (for example, spaces and punctuation marks) are not supported in the search.
	Select to perform the search.
	Select to refine the performance note list by document type (if applicable) and creation date range.
Display Historical Notes	Use this slider to control the display of historical notes on the Performance Notes page. By default, this option is cleared. When selected, the Historical Notes section appears. Expand the section to view historical notes.

Current Notes

This section displays:

- Standalone notes created for team members (in Manager Self-Service) or employees themselves (in Employee Self-Service), and
- Notes that are associated with documents for team members (in Manager Self-Service) or employees themselves (in Employee Self-Service), where the document status is not *completed* or *canceled*.

Note: Notes can also be created directly from documents at the header, section, and item levels as configured in the setup.

If a document is completed or canceled by the manager, the system automatically changes all current notes of the document to historical notes. If the manager reopens a document, all its historical notes automatically become current notes.

<i>Field or Control</i>	<i>Description</i>
<Note subject>	Select to open the note for review on the Performance Notes Page or My Performance Notes (Note Details) .
	Select to view the list of actions that are applicable to the note and select an action to perform. Values can include: <i>Open:</i> Select to open the note for review on the Performance Notes Page or My Performance Notes (Note Details). <i>Transfer To:</i> Select to transfer the note to a different individual selected from the person search page. This option is applicable only to standalone current notes. <i>Delete:</i> Select to delete the note. This option is applicable only to current notes. <i>Move to Historical:</i> Select to move the current note to the Historical Notes section of the performance note list. This option is applicable only to standalone current notes. Use <i>Move to Historical</i> and <i>Move to Current</i> options to organize your notes by moving the ones that you already worked on or no longer need to the historical notes list, keeping the current notes list cleaner to work with. Performance notes are grouped in Current Notes and Historical Notes sections for organization purposes primarily; there is no functional difference between current and historical notes.

Historical Notes

This section displays notes that:

- Have been moved to this list using the *Move to Historical* action, or
- Are associated with completed or canceled documents, or

If a canceled document is subsequently deleted by the manager, its notes become standalone historical notes.

- Were not included when their documents were transferred to a new manager.

These notes become standalone historical notes.

Deleted notes also appear in this section if the setup option to retain delete notes is enabled.

Field or Control	Description
<Note subject>	Select to open the note for review on the Performance Notes Page or My Performance Notes (Note Details) .
	Select to view the list of actions that are applicable to the note and select an action to perform. Values can include: <i>Open:</i> Select to open the note for review on the Performance Notes Page or My Performance Notes (Note Details). <i>Move to Current:</i> Select to move the historical note to the Current Notes section of the performance note list. This option is applicable only to standalone historical notes.

Add Note Page

Use the Add Note page (EP_NP_NOTE_SCF) to create new performance notes.

Navigation:

Select the **Add Note** link on the Performance Notes page or My Performance Notes page.

This example illustrates the fields and controls on the Add Note page.

CancelAdd NoteDone

** Indicates required field*

Select the employee for whom you wish to create a Performance Note. The note is only visible to you.
Select Done to save your note.

***Who is the Note for?**



Daryl Reese
Financial Analyst

[⊕ Select Different Team Member](#)

***Subject**

Note Text

↶

↷

A[≡] ▾

A^I ▾

A ▾

A ▾

B

I

U

1/2 ▾

:: ▾

▾

Enter Performance Note...

Add Note to Document

[Clear Selection](#)

☐ Annual Review
1 Jan - 31 Dec 2024

☐ Annual Review
1 Jan - 31 Dec 2023

Field or Control	Description
Select Team Member or Select Different Team Member	Use either link to select the individual for whom the note is created. These links are applicable to managers only. They are not available to employees because employees can only create notes for themselves. The Select Team Member link appears when no one has been selected yet. After an individual has been selected, the Select Different Team Member link appears instead, allowing a different person to be chosen if needed.
Subject	Enter the note subject (required).
Note Text	Enter note details. This field supports rich text up to 8000 characters. Sometimes, copying and pasting rich text from an external source (for example, an HTML page or Word document) includes invisible text formatting data that may cause the pasted content to exceed the maximum character limit. To remove unwanted formatting data, paste the content using the Ctrl+Shift+V (Windows) or Cmd+Shift+V (Mac) keyboard shortcut, or paste the content as plain text (without formatting) from the right-click menu. Reapply formatting from this rich text field as needed.

Add Note to Document

This section lists the current documents (where document status is not completed or canceled) of the individual for whom the note is created.

If this note is specific to a document of the individual, select it in this section. Select the **Clear Selection** button to reset it to be a standalone note.

Performance Notes Page or My Performance Notes (Note Details)

Use the Performance Notes page or My Performance Notes page (EP_NOTE_FL) to review note details.

Navigation:

Select a note from the list on the [Performance Notes Page or My Performance Notes Page \(Note List\)](#).

This example illustrates the fields and controls on the Performance Notes page when a selected note is shown, which looks the same as the My Performance Notes page.

Performance Notes

<

Return to Performance Note Selection

Daryl Reese

Administrative Assistant

Use the More Actions menu to view the available actions for this note.

Subject

Quarterly check-in

Section

Goals

Annual Review:

1 Jan - 31 Dec 2024

Daryl planned to take project mgt training next quarter

Created

12 Mar 2025 01:29PM

Created By

Rosanna Channing

The Performance Notes page displays detailed information of the note, such as subject, creation date and time, note text, last updated date and person (when the note is updated or transferred).

Field or Control	Description
Return to Performance Note Selection	Select to return to the performance note list on the Performance Notes Page or My Performance Notes Page (Note List) .
<Document link>	Displays the link to the document with which the note is associated, if applicable. Select the link to open the associated document. If the note was created for a document section or item, the corresponding information is displayed as well.
	Select an action to perform for the note. Valid values can include: <i>Edit:</i> Select to open the note for update on the Update Note Page. <i>Transfer To:</i> Select to transfer the note to a different individual selected from the person search page. This option is applicable only to standalone current notes. <i>Move to Historical:</i> Select to move the current note to the Historical Notes section of the performance note list. This option is applicable only to standalone current notes. <i>Move to Current:</i> Select to move the historical note to the Current Notes section of the performance note list. This option is applicable only to standalone historical notes. <i>Delete:</i> Select to delete the note. This option is applicable only to current notes.

Update Note Page

Use the Update Note page (EP_NP_NOTE_SCF) to edit note details.

Navigation:

Select *Edit* from the **More** actions menu on the Performance Notes Page or My Performance Notes (Note Details).

This example illustrates the fields and controls on the Update Note page.

Cancel

Update Note

Done

* Indicates required field

Select Done to update your changes to the note or Cancel to return.

Mei Lee
Accountant

*Subject

Certification

Note Text

← → A² A¹ A₂ A₁ B I U $\frac{1}{2}$ $\frac{3}{4}$

Received project management certification

Add Note to Document

Clear Selection

☐ Annual Review
1 Jan - 31 Dec 2024

☐ Performance Document
1 Jan - 31 Dec 2024

☐ Annual Review
1 Jan - 31 Dec 2023

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<i>Field or Control</i>	<i>Description</i>
<Employee info>	The employee photo and information is not shown when you are updating the note as an employee.
Note added to Document	This section cannot be updated if the note was linked to document at the time of creation. If a wrong document was selected for the note, delete the note and add a new one.
Add Note to Document	If the note was created standalone, without a document, you can select a document in this section to link to the note when you update it for the first time.

Working With Fluid Business Objectives

Understanding Fluid Business Objectives

Fluid Business Objectives modernizes the Business Objectives functionality, providing a refreshing and intuitive user experience for creating, managing, and viewing business objectives in the system.

The Business Objectives functionality provides organizations the ability to create and publish company objectives, display them in an organization chart view, and tie employee goals to the goals and initiatives of departments, business units, and ultimately to the overall organizational strategy.

The process of setting up business objectives is similar to the setup for performance documents. It includes the definition of objective plans that specify the time period and hierarchy method, objective sections, and objective templates. These definitions are used in creating business objective documents for departments or positions.

The fluid version of Business Objectives delivers:

- A modern user interface to enhance the user experience in working with business objectives. The new design includes:
 - A redesigned document concept and layout that is optimized for any device.
 - The **More Actions** menu in multiple locations of the business objective document to provide relevant user actions where they are needed.
- Ability for managers to create, manage, and view business objectives of which they are the owner or editor.

See [Business Objectives Tile](#).

- Ability for employees to view published business objectives from their direct managers, and also from their organizational hierarchy.

See [View Business Objectives Tile](#).

Video: [Image Highlights, PeopleSoft HCM Update Image 47: Fluid Performance Management: Business Objectives](#)

Video: [Image Highlights, PeopleSoft HCM Update Image 49: Cascade and Publish Business Objectives](#)

Fluid Business Objectives does not contain pages for administrator tasks, which include, but not limited to, set up templates, publish objectives, cascade objectives to performance document, manage objective statuses, and so on. Administrators continue to access existing pages for these tasks using the Global Search bar or the Menu tile in the NavBar.

For more information about administrator tasks for the Business Objectives functionality, refer to the topics in the *Setting Up Business Objectives* and *Performing Administrative Tasks* chapters of the *PeopleSoft HCM: ePerformance* product documentation.

Related Links

[Understanding Business Objective Setup](#)

[Understanding the Creation of Business Objectives Pages](#)

[Identifying Business Objective Nodes](#)

[Publishing Business Objectives](#)

[Cascading Objective Items](#)

[Administering Business Objectives](#)

[Restarting Objective Batch Processes](#)

Business Objectives Versions

We use these terms as needed in this product documentation to refer to the supported versions, *Fluid Business Objectives* and *Classic Business Objectives*.

Note: Both versions support the same business objective process flow and functionality in general, for that we use the same document content. Any differences in behavior between these versions will be identified using these terms wherever appropriate.

- *Fluid Business Objectives* – in this version, both document lists as well as pages used for creating, managing, and viewing business objectives are completely redesigned in Fluid for managers and employees (view access for employees only).

Users with the *Fluid Dashboard - MSS ePerf* role (for managers) or the *Fluid Dashboard - ESS ePerf* role (for employees) have access to the Fluid Business Objectives functionality.

- *Classic Business Objectives* – in this version, pages used for creating, managing, and viewing business objectives are displayed in Classic Plus mode.

Note: This is the version available for use if the Fluid Business Objectives functionality is not applied to the system.

Fluid Business Objectives Setup

Fluid Business Objectives uses the same installation and setup pages (for example, section and template definitions) as Classic Business Objectives. New, fluid-only options are also added on these pages for Fluid Business Objectives. For options that apply only to one version but not both, they will be stated properly in corresponding topics.

For more information about business objective setup, refer to topics in the *Setting Up Business Objectives* chapter of *PeopleSoft HCM: ePerformance*.

The system delivers lists of actions for the **More Actions** menu used in different locations of a document on the [Fluid Popup Menu Setup Page](#) page. For more information about the **More Actions** menu, see [Understanding the More Actions Menu](#).

ePerformance supports the insertion of business objectives as items in performance documents and the alignment of performance document items to business objectives. Refer to the [Setting Up Business Objectives To Work With Performance Documents](#) topic for more information about the steps and key points recommended for the setup.

User Roles for Fluid Business Objectives

Users need these roles to work with business objective documents in Fluid:

- (Administrator) *ePerformance HR Admin Fluid* (Administer ePerformance Fluid)

This role provides access to the [Review Manager Cascaded Items Page](#) to review a list of item cascading processes run by managers.

- (Manager) *Fluid Dashboard - MSS ePerf* (Manager ePerformance Dashboard)

This role provides access to the [Team Performance Dashboard](#) after selecting the Team Performance tile. The Business Objectives tile is delivered on the Team Performance dashboard by default. It can be added to any Fluid home page through personalization.

- (Employee) *Fluid Dashboard - ESS ePerf* (Empl ePerformance Dashboard)

This role provides access to the [Performance Dashboard](#) after selecting the Performance tile. The View Business Objectives tile is delivered on the Performance dashboard by default. It can be added to any Fluid home page through personalization.

Important! (Manager and employee) Users without any fluid dashboard role continue to access their business objective document lists using respective menu navigations. They work with business objective documents using Fluid pages the same way as the users who have the fluid dashboard roles. Users still need *ePerformance Manager Fluid* and *ePerformance Employee Fluid* roles to take advantage of the Fluid Business Objectives functionality.

Permission Lists for Fluid Business Objectives

Oracle delivers these permission lists for Fluid Business Objectives:

- HCCPSS1360 (ePerformance Employee Fluid)
- HCCPSS2160 (ePerformance Manager Fluid)
- HCCPEP2260 (ePerformance - HR Admin Fluid)

Considerations for Implementing Fluid Business Objectives

Here are a few points to keep in mind as you plan to uptake Fluid Business Objectives:

- Consider switching over to Fluid Business Objectives after the conclusion of a review period rather than in the middle of the review cycle if possible.
- To avoid unexpected system behavior, do not switch back to Classic Business Objectives after Fluid Business Objectives is applied.

- To ensure that the system works properly, both managers and employees should be switched to using Fluid Business Objectives.
- Create new document templates if you wish to leverage the configurable sub-item label that is introduced in Fluid Business Objectives.

Fluid Business Objectives Topics

Fluid Business Objectives is discussed in these topics.

- [\(Fluid\) Accessing Business Objective Tiles and Document Lists](#)

Lists the tiles and dashboard pages to access business objective documents in Manager Self-Service and Employee Self-Service.

- [\(Fluid\) Working With Business Objective Documents](#)

Discusses all Fluid pages and common elements delivered for creating and managing business objectives.

(Fluid) Accessing Business Objective Tiles and Document Lists

This topic lists the tiles and document lists delivered for users to access business objective tasks in Manager and Employee Self-Service.

Pages Used to Access Business Objective Tiles and Document Lists

Page Name	Definition Name	Usage
Business Objectives Tile	HC_EPO_UPDT_MY_OBJ_LNK (cref for the tile)	(Manager) Access the Business Objectives page.
Business Objectives Page	EPO_PAGE_SELECT_FL	(Manager) Create or manage business objective documents.
View Business Objectives Tile	HC_EPO_VIEW_MY_OBJ_EE_FL_GBL (cref for the tile)	(Employee) Access the View Business Objectives page.
View Business Objectives Page	EPO_PAGE_SELECT_FL	(Employee) View business objective documents.

Business Objectives Tile

(Manager) Use the Business Objectives tile (HC_EPO_UPDT_MY_OBJ_LNK) to access the Business Objectives page.

Navigation:

The Business Objectives tile is located on the [Team Performance Dashboard](#).

This example illustrates the Business Objectives tile.



See [Business Objectives Page](#).

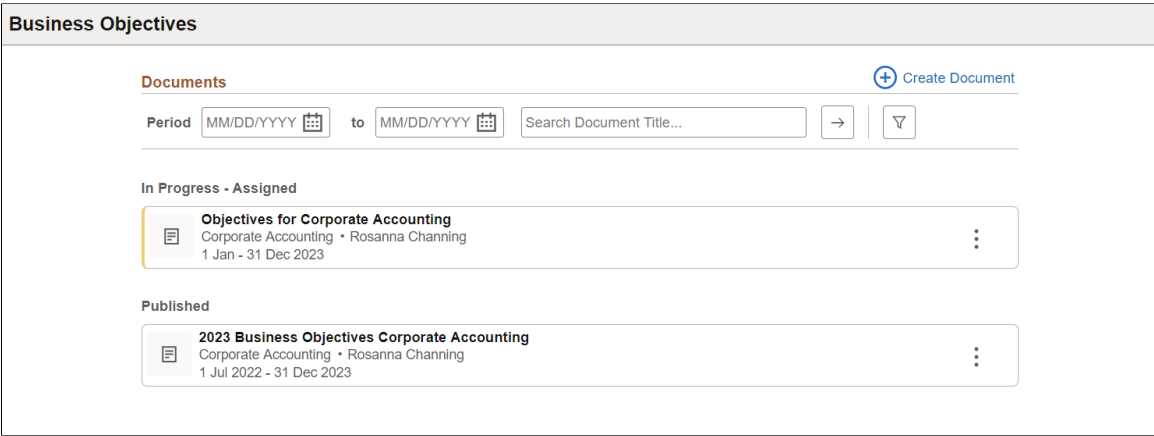
Business Objectives Page

(Manager) Use the Business Objectives page (EPO_PAGE_SELECT_FL) to create or manage business objective documents.

Navigation:

Select the **Business Objectives** tile.

This example illustrates the Business Objectives page that displays a list of business objective documents for your team



The document list displays the business objective documents of which you are the owner or alternate editor, grouped by document status.

You can refine the document list by specifying a time period, document title keywords, or both as search criteria.

Field or Control	Description
Create Document	Select to create business objective documents on the New Business Objective Document Page. This option is available to managers or alternate editors if the option is enabled on the ePerformance Installation - Objective Pages Page. Employees cannot create their own business objective documents.
Period and to	Use the Period date (the period begin date), To date (the period end date), or both dates to refine the search by date range, if applicable. For example, enter 01/01/2023 as the Period date to find documents with a period begin date that is equal to or later than January 1, 2023. Enter 12/31/2023 as the To date to find documents with a period end date that is equal to or earlier than December 31, 2023. A document inherits its time period from the associated objective plan.
<search field>	Enter partial (using % as the wildcard character) or whole keywords of document titles for the search.
	Select to perform the search.
 or 	Select to specify filter values (for example, objective plan, department or position to which you have access, alternate editor, and document status) on the Filters modal page to further refine the search results. The Filter icon is displayed in a highlighted color if filters are applied.

Document List

Grouped by document status, documents are displayed in the following order:

In Progress - Assigned: Lists documents that are newly created, edit in progress, or reopened from the previous *Ready to Publish* status.

In Progress - Unassigned: Lists documents that do not have an owner yet. Documents without an owner cannot be published.

Ready To Publish: Lists documents that have been submitted for publication.

Published: Lists documents that have been published by the administrator.

Locked: Indicates that the corresponding document is currently locked by the administrator. Administrators can lock Business Objective documents on the [Manage Objectives Status Page](#).

Each document card is color-coded on its left vertical border based on its status or state, for example:

- Orange for the *In Progress* statuses
- Green for the *Ready to Publish* status
- Red if the document is locked. Locked documents cannot be edited, but you can interact with the **More Actions** menu.
- No color for the *Published* status

The card displays general information about the business objective document, such as the document title, department or position title, owner name, alternate editor name (if applicable), objective plan period, and *Locked* status (if the document is locked).

Field or Control	Description
<Document title>	Select the document card to open the document for review or update. See Business Objectives Document Page .
	Select to view the list of actions that are applicable to the document and select an action to perform from the More Actions menu. The list of actions varies based on a few factors, such as the template setup, and the current status of the document. See Document-Level More Actions .

Preferred Name Display

The document lists show employee names based on the display name setup in the Name Format tables, which supports preferred names.

However, when you select a document to view or update on the document page, the employee name display can be different, depending upon the time period of the document. Suppose that the employee added an additional name (preferred first name) that is effective today and the display name setup includes preferred first name:

- If the period end date of the document is in the future, the preferred first name appears in the employee's full name in the document.
- If the period end date of the document is in the past, the default first name is used, and the preferred first name does not appear in the employee's full name in the document.

See Also “Setting Up Additional Name Information” (Application Fundamentals).

View Business Objectives Tile

(Employee) Use the View Business Objectives tile (HC_EPO_VIEW_MY_OBJ_EE_FL_GBL) to access the View Business Objectives page.

Navigation:

The View Business Objectives tile is located on the [Performance Dashboard](#).

This example illustrates the View Business Objectives tile.



See [View Business Objectives Page](#).

View Business Objectives Page

(Employee) Use the View Business Objectives page (EPO_PAGE_SELECT_FL) to view business objective documents.

Navigation:

Select the **View Business Objectives** tile.

When you access the View Business Objectives page as the employee:

- You can view a list of published business objective documents owned by your manager.
You can also view published business objectives from other departments or positions of your organizational hierarchy using the **More Actions** menu.
- You cannot create or update business objectives.
- Searching and filtering are not available.

This example illustrates the View Business Objectives page that displays a list of business objective documents to which you can access as an employee.

View Business Objectives		
Documents		
	2023 Business Objectives Finance Finance and Administration • Jean Parsons 1 Jul 2022 - 31 Dec 2023	⋮
	2016 Business Objectives Finance and Administration Finance and Administration • Jean Parsons 1 Jul 2015 - 31 Dec 2016	⋮
	2009 Objectives for Finance & Administration Finance and Administration • Jean Parsons 1 Jan - 31 Dec 2009	⋮

(Fluid) Working With Business Objective Documents

This topic lists common elements and pages used to work with business objective documents in Fluid.

In this topic, you will find:

- Information about the More Actions menu and lists of supported document-level, section-level, and item-level actions.
- A complete list of pages used to support the creation and update of business objective documents.

See Also [Understanding Fluid Business Objectives](#).

Pages Used to Work With Business Objective Documents

Page Name	Definition Name	Usage
New Business Objective Document Page	EPO_CREATE_PAGE_FL	Create business objective documents for departments or positions.
Business Objectives Document Page	EPO_MAIN_FL	Add and manage business objectives for departments or positions.
Add Objectives - Select / Create Objectives Page	EPO_MAIN_ADDOBJ_FL	Add business objectives to document sections.
Select / Create Objectives - Pre-defined Page	EPO_MAIN_ADDOBJ_FL	Add pre-defined objectives to document sections.
Select / Create Objectives - Custom Page	EPO_MAIN_ADDOBJ_FL	Add objectives that you create manually to document sections.
<Section Name> in List Page	EPO_MAIN_ITEMS_SCF	View or remove items from the document section.

Page Name	Definition Name	Usage
<u>Document Details Page</u>	EPO_DOC_DETAILS_FL	View and edit document details.
<u>Published Objectives Page</u>	EPO_ORG_CHART_FL	View published business objectives from other departments or positions.
<u>Business Objectives Document Page</u>	EPO_VIEW_PAGE_FL	Preview or view documents in a formatted manner.
<u>Notify Owner Page</u>	EPO_NOTIFY_SCF	Send notifications to business objective document owners.
<u>Business Objectives - <Date> Page</u>	EPO_MAIN_FL	View previous versions of business objective documents.
<u>Publish Page</u>	EPO_PUB_OPTION_SCF	Submit documents for publication or publish documents directly.
<u>Edit Items - <Objective Name> Page</u>	EPO_MAIN_ITMED_FL	Update business objectives.
<u><Section Name> - Goals Page</u>	EPO_MAIN_SBITM_SCF	Add pre-defined sub-items to objectives.
<u>Employees Aligned to Organizational Objectives Page</u>	EPO_ALIGN_SUM_FL	View the number of business objective alignments for employees.
<u>Alignment Chain Page</u>	EPO_ALIGN_CHN_SCF	View the alignment of the current objective to other corporate or departmental objectives in the upper hierarchy.
<u>Cascade Items Page</u>	EPO_CASC_PARAM_SCF	Select business objectives to cascade to performance documents of your team.
<u>Reorder Objective Items Page</u>	EPO_MAIN_REORD_SCF	Change the order of objectives displayed in document sections.
<u>Reactivate Objective Items Page</u>	EPO_MAIN_REACT_SCF	Reactivate objectives in document sections.
<u>Last Updated Page</u>	EP_AUDIT_SCF	View the audit information of business objectives.

Understanding the More Actions Menu

The **More Actions** menu appears in various locations on document pages to provide relevant user actions.

More actions are available as you work on different levels or areas of a business objective document, for example:

- [Document-Level More Actions](#)
- [Section-Level More Actions](#)
- [Item-Level More Actions](#)

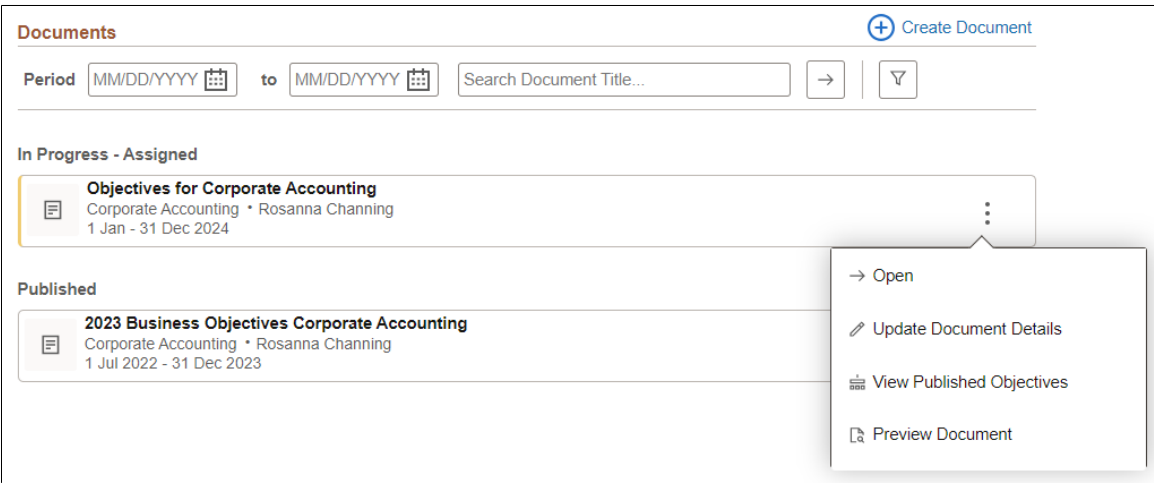
Note: Actions from the **More Actions** menu are set up on the [Fluid Popup Menu Setup Page](#). The two actions for creating sub-items (*Add Pre-defined* and *Add Your Own*), although not available from the **More Actions** menu, are also set up on the Fluid Popup Menu Setup page. Some actions are always available; others are available based on document status (for example, *Reorder Objectives* in *In Progress - Assigned* documents only), or template setup (view *Alignment Chain* and add sub-items in objectives).

Document-Level More Actions

One or more of these actions are available when you select either:

- The **More Actions** menu of a business objective document card.
- The **More Actions** menu that appears in the header area of a business objective document.

This screenshot shows an example of the More Actions menu for a business objective document card.



This screenshot shows an example of the More Actions menu at the header area of a business objective document.



Important! Note that the action lists for the document card and document header menus are not identical.

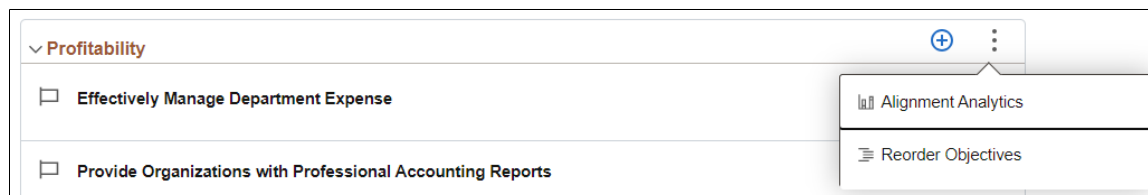
Refer to this table for the list of delivered document-level actions:

Field or Control	Description
Open	Select to open the document on the Business Objectives Document Page . It is the same as selecting the document name.
Update Document Details	Select to edit the basic information (for example, document title, comments, and the alternate editor) that was used to create the document on the Document Details Page . This option is applicable to <i>In Progress - Assigned</i> documents only.
View Published Objectives	Select to view business objectives from other departments or positions on the Published Objectives Page .
Preview Document or View Document	Select to preview or view the document on the Business Objectives Document Page page. The Preview Document option is applicable to <i>In Progress – Assigned</i> documents; the View Document option is applicable to the rest of the document statuses, as well as locked documents.
Notify Owner	Select to send a message to the owner of the document, for example, from the alternate editor on the Notify Owner Page .

Section-Level More Actions

One or more of these actions are available when you select the **More Actions** menu of a section on the [Business Objectives Document Page](#).

This screenshot shows an example of the More Actions menu at the section level of a business objective document.



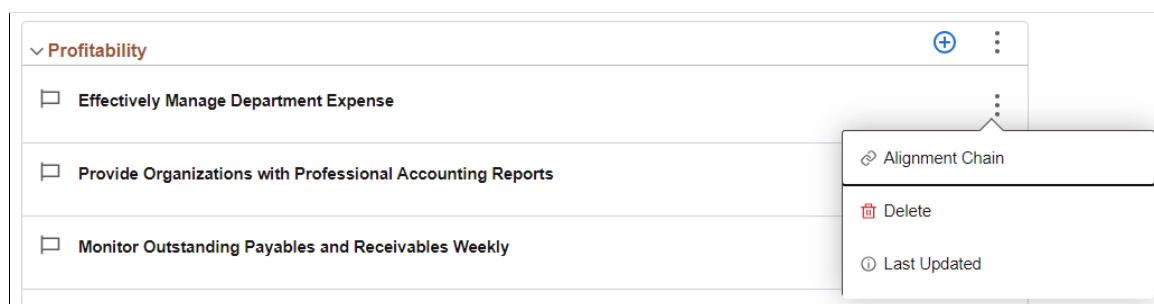
Field or Control	Description
Alignment Analytics	Select to view in a bar chart the number of employee alignment for each objective in the section of a published document on the Employees Aligned to Organizational Objectives Page .
Cascade Items	Select to cascade one or more business objectives to performance documents of your team on the Cascade Items Page. This option is applicable to <i>Published</i> documents only. It becomes available if the Allow Managers or Alternate Editors to cascade items option is selected on the ePerformance Installation - Objective Pages Page.
Reorder Objectives	Select to reorder objectives of the section by dragging and dropping them on the Reorder Objective Items Page. This option is applicable to <i>In Progress - Assigned</i> documents only. It becomes available where there is more than one objective in a section.
Reactivate Objectives	Select to reactivate inactive published objectives on the Reactivate Objective Items Page. This option is applicable to <i>In Progress - Assigned</i> documents only.

Item-Level More Actions

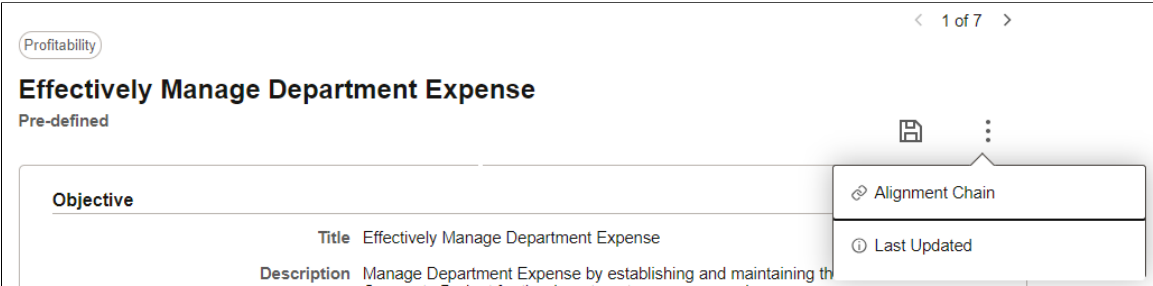
One or more of these actions are available when you click either:

- The **More Actions** menu of a business objective on the [Business Objectives Document Page](#).
- The **More Actions** menu that appears in the header area of a business objective.

This screenshot shows an example of the More Actions menu at the item level of a business objective document.



This screenshot shows an example of the More Actions menu at the header area of a business objective.



Important! Note that the action lists for the item (in a document section) and item header menus are not identical.

Field or Control	Description
Alignment Chain	Select to view the alignment of the current business objective to other corporate or departmental objectives in the upper hierarchy on the Alignment Chain page. See Alignment Chain Page .
Delete	Select to remove the business objective. When you delete an existing objective from an in-progress document that was previously published, the system inactivates the objective, which can no longer be visible from the saved document. You have the option to reactivate the objective using the <i>Reactivate Items</i> action at the section level. See Also Reactivate Objective Items Page .
Last Updated	Select to view the audit information of the business objective on the Last Updated Page .

New Business Objective Document Page

Use the New Business Objective Document page (EPO_CREATE_PAGE_FL) to create business objective documents for departments or positions.

Navigation:

Select the **Create Document** link on the [Business Objectives Page](#).

This example illustrates the fields and controls on the New Business Objective Document page.

Create Document

* Indicates required field

New Business Objective Document

Cancel

Create

Role

Create Document

☒ For Self
 ☐ As Alternate Editor

Objective

*Plan

2023 BUSINESS OBJECTIVES

▼

Period: 1 January 2023 - 31 December 2023

*Effective Date

06/14/2023

📅

*Department

▼

*Template

▼

Document

*Title

*Publication Due Date

MM/DD/YYYY

📅

Comments

Ownership

Owner Name

Betty Locherty (You)

Owner Title

Finance Director

Alternate Editor

⊕ Add

<i>Field or Control</i>	<i>Description</i>
Create	Select to create the business objective document using the information entered on the page. The newly created document is ready for update.

Role

Field or Control	Description
Create Document	Select: <i>For Self</i> to create business objectives for yourself as the head of a department. You become the owner of the business objective document. <i>As Alternate Editor</i> if you create business objectives on behalf of the head of a department. You become the alternate editor of the business objective document.

Objective

Field or Control	Description
Plan	Select the objective plan for which you want to create the business objective document. The document inherits information, such as time period and hierarchy type (department or position), from the selected objective plan. (For self) Select from plans that have identified your department (or position) as a node for having business objectives, but no document has been created yet with you as the owner. (For alternate editor) Select from plans that have identified your department (or position) as a node for having business objectives. By default, the latest active objective plan is preselected if applicable. See Also Identifying Business Objective Nodes.
Effective Date	The system populates the current date as the default effective date for the business objective document.

Field or Control	Description
Department	Select the department for which you want to create the business objective document. This field appears if the hierarchy method of the associated objective plan is <i>Department</i>. (For self) Departments of which you are the manager are available for selection. (For alternate editor) Departments to which you have security access are available for selection.
Position	Select the position for which you want to create the business objective document. This field appears if the hierarchy method of the associated objective plan is <i>Position</i>. (For self) Your current position is displayed. (For alternate editor) Positions that are assigned to the associated objective plan as nodes are available for selection.
Template	Select the template used to create the document. Active templates that are effective as of the specified effective date of the business objective document are available for selection.

Document

Field or Control	Description
Title	Enter the name of the business objective document. The system prepopulates this field with the default title created from the selected objective template and department.
Publication Due Date	Enter a due date for publishing the business objective document.

Ownership

<i>Field or Control</i>	<i>Description</i>
Owner Name and Owner Title	(For self) These fields display your name and job title as the owner of the business objectives. If you have multiple jobs, select the applicable job title. The system displays your primary job as the default value. (For alternate editor) If the option to allow alternate editors to select owners is enabled in the setup, you can add, update, and delete (and add again) the owner. If the selected owner has multiple jobs, only the primary job will be considered. If you are creating the business objective document for a position and you happen to select your current position, your name and title will be displayed as default. Note: Documents without an owner cannot be published.
Alternate Editor	(For self) The Add button becomes available for you to add an individual who can update the business objective document on your behalf. You can also update or delete the alternate editor. (For alternate editor) This field displays your name.

Business Objectives Document Page

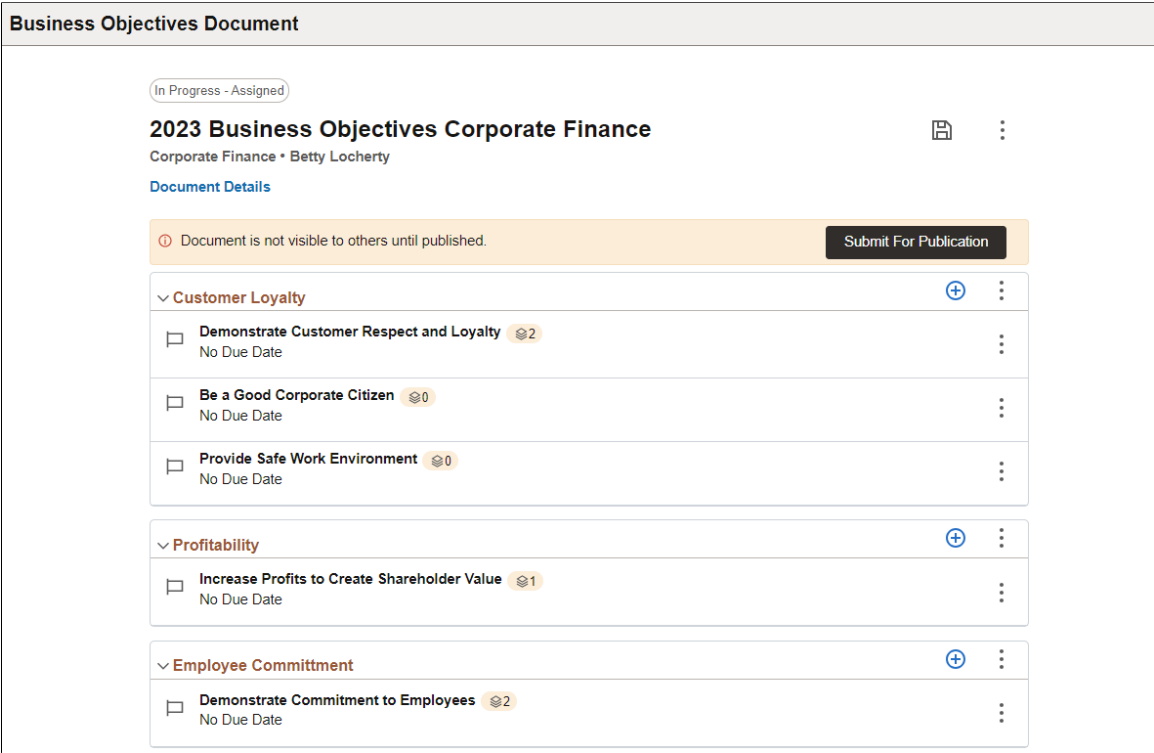
Use the Business Objectives Document page (EPO_MAIN_FL) to add and manage business objectives for departments or positions.

Navigation:

- Select the title of a business objective document on a document list.
- Select *Open* from the **More Actions** menu of a document on a document list.

See Also [Business Objectives Page](#) for managers and [View Business Objectives Page](#) for employees.

This example illustrates the fields and controls on the Business Objectives Document page.



The top portion of the page displays some of the basic information of the business objective document, for example, document status, document title, department or position name, document owner, and alternate editor (if applicable).

Field or Control	Description
Document Details	Select to view the general information (such as the associated objective plan, template, ownership, and so on) of the business objective document on the Document Details Page . You may edit some information from document details, such as add in a comment or an alternate editor.
	Select to save the page.
	Select to view a previous version of the business objectives by selecting a date from the View History drop-down list. This button appears if past effective-dated versions exist for the business objective document. See Business Objectives - <Date> Page .
	Select to access relevant actions that can be performed on the business objective document based on its status. See Document-Level More Actions .

Field or Control	Description
<Highlighted message>	Displays an informational or reminder message for the document, followed by an action button if applicable.
Publish	Select to either submit the document to the administrator for publication, or publish it without an administrator review on the Publish Page. Based on the selection, the document status is changed to either <i>Ready to Publish</i> or <i>Published</i>. This button is applicable to <i>In Progress - Assigned</i> documents only. It becomes available if: • The Allow Managers or Alternate Editors to publish documents option is selected on the ePerformance Installation - Objective Pages Page, AND • The document has never been published. Note: The Publish button is not available to documents that were once published. To republish documents, you must use the Submit For Publication button.
Submit For Publication	Select to submit the document to the administrator for publication and changes the document status to <i>Ready To Publish</i>. This button is applicable to <i>In Progress - Assigned</i> documents only. It becomes available if: • The Allow Managers or Alternate Editors to publish documents option is cleared on the ePerformance Installation - Objective Pages Page, OR • The Allow Managers or Alternate Editors to publish documents option is selected on the installation page, and the document has been published previously.
Reset Status	Select to change the status of the document back to <i>In Progress - Assigned</i>, for example, if you wish to modify the document, such as add new or reorder objectives. This button is applicable to <i>Ready to Publish</i> documents only.

Field or Control	Description
Update	Select to reopen the published document for update by specifying a new effective date. This button is applicable to <i>Published</i> documents only. Important! It is important to keep the effective dates synchronized between parent and child documents for objective alignment purposes. As such, exercise caution when you consider updating published documents. As you modify a published document by adding a new effective-dated row, the effective dates of this document and its parent (or child) document may become out of sync, which causes issues when you try to align objectives in the child document because the system can no longer identify the parent document to which it aligns. To prevent alignment issues from happening because of the out-of-sync issue concerning effective dates, it is recommended that you first update and republish the parent document prior to updating and republishing the child documents. Note: If the document you are updating was published earlier <i>on the same day</i>, you have the option to either reopen the published document with the same effective date or add a future effective-dated row for the document, both of which set the document status to <i>In Progress - Assigned</i>. The future effective-dated document cannot be published until on or after its effective date.

<Section Name>

A section is a grouping of similar business objectives. The objective template setup controls the list and sequence of sections that are available in documents, as well as what you can do in each of them, for example:

- Add pre-defined or custom objectives.
- View basic information (if available) of objectives, such as due date and whether the objective has been aligned.
- Perform section-level actions.

Note: If a manager submitted the Cascade Objective Items process for a section previously on the [Cascade Items Page](#), the system displays a status message next to the section title that shows when the process was last submitted or completed.

Field or Control	Description
	Click to add business objectives to the section on the Add Objectives - Select / Create Objectives Page. This option is available to <i>In Progress - Assigned</i> documents only.
	Select to view the list of actions that are applicable to the section and select an action to perform. See Section-Level More Actions.
<objective name>	Select to view or edit the objective on the Edit Items - <Objective Name> Page page. Business objectives are shown initially as <i>Not Aligned</i>, if the Alignment functionality is enabled (using Aligned Items and Aligned To fields) for the section on the Objective Section Definition Page. If the business objective is created for the highest level in the hierarchy (for example, the C-level in an organization), alignment does not apply because there is no objective at a higher level to which it can align.
<sub-item badge>	Indicates the number of sub-items added to the corresponding objective.
	Select to view the list of actions that are applicable to the objective and select an action to perform. See Item-Level More Actions.

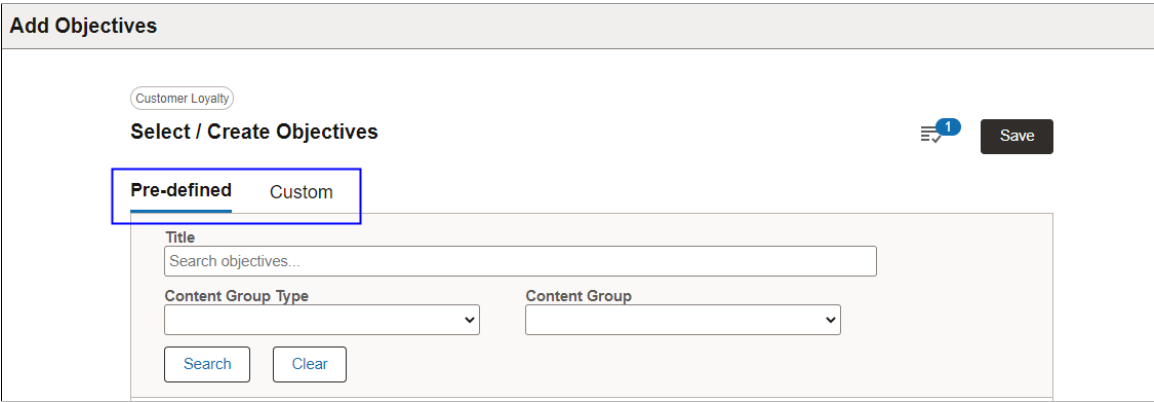
Add Objectives - Select / Create Objectives Page

Use the Add Objectives - Select/Create Objectives page (EPO_MAIN_ADDOBJ_FL) to add business objectives to document sections.

Navigation:

Select the **Add Item** icon on the [Business Objectives Document Page](#).

This example illustrates the fields and controls that are available in the header area of the Select/Create Objectives page.



Select/Create Objectives Page Header

Field or Control	Description
	Displays the count of objectives that are temporarily added to the list. When you add or remove an objective, the system updates the count and items in the list automatically. Select to view or remove items from the list on the <Section Name> in List Page .
Save	Select to add all objectives displayed in the list to the document and exit the page.
Pre-defined	Select to access the Select / Create Objectives - Pre-defined Page .
Custom	Select to access the Select / Create Objectives - Custom Page .

Select / Create Objectives - Pre-defined Page

Use the Select/Create Objectives - Pre-defined page (EPO_MAIN_ADDDOBJ_FL) to add pre-defined objectives to document sections.

Navigation:

Select the **Pre-defined** tab on the [Add Objectives - Select / Create Objectives Page](#).

This example illustrates the fields and controls on the Select/Create Objectives - Pre-defined page.

The **Pre-defined** tab is available if the **Enable Items** option is selected for the section based on the template setup.

Business objectives are content items that are defined under the *OBJECTIVES* (Business Objectives) content type on the Content Items – Item Details page. Optionally, a content item can be associated with a content group type and a content group on the Content Items - Group Memberships page. For example, you may associate the *Evaluate Employee Benefits* business objective (content item) with *Corporate Objectives Groups* (content group type) and *Commitment to Employees* (content group).

If a document section has content group setup in the objective template, the **Pre-defined** tab for that section lists business objectives (content items) with matching content group setup in the Content Items setup.

Suppose that in the objective template, the *Employee Commitment* section is set up with *Corporate Objectives Groups* (content group type) and *Commitment to Employees* (content group) using the **Define Content Group** link. Now, when you attempt to add pre-defined business objectives to the *Employee Commitment* section of a document created from that objective template, the *Evaluate Employee Benefits* business objective will be displayed for selection.

If the section does not have any content group setup in the objective template, all business objectives become available for selection.

Field or Control	Description
Title, Search, and Clear	Enter keywords to filter predefined objectives by objective name. Select the Search button to perform search. Select the Clear button to remove existing search criteria and results and perform another search.

Field or Control	Description
Content Group Type and Content Group	Filter business objectives by content group type and content group if applicable. Select the Search button to perform search. The system prepopulates these values with the setup that is defined in the objective template using the Define Content Group link, if available.
<Objective name>	Select one or more objectives to add to the section, or clear the selection of selected objectives to remove them from the section. The objective list count updates automatically when either action takes place. Note: Selecting the Clear button does not remove objectives that are currently added to the objective list. To remove an objective, deselect it from the search results. The objective is displayed in this format: [Objective name] [Associated content group type] / [Associated content group] Example: Evaluate Employee Benefits Corporate Objectives Groups / Commitment to Employees If the objective is not associated with any content group type and content group, only the title will be displayed.
	Select to view additional information of the objective on the Details page (EPO_MAIN_OINFO_SCF).

Select / Create Objectives - Custom Page

Use the Select/Create Objectives - Custom page (EPO_MAIN_ADDOBJ_FL) to add objectives that you create manually to document sections.

Navigation:

Select the **Custom** tab on the Add Objectives - Select / Create Objectives Page.

This example illustrates the fields and controls on the Select/Create Objectives - Custom page.

Add Objectives

Employee Commitment

Select / Create Objectives

0

Save

Pre-defined

Custom

You can add multiple custom objectives and they will be temporarily added in the list. Browse the list to remove the added objectives. You can edit custom objectives after saving in the document.

Objective

*Title

Description

Measurement

Due Date

MM/DD/YYYY

Status

Percent Complete

Alignment

Page Title

2023 Business Objectives Commerical Operations

Aligned To

Clear

Add to List

In addition to objectives that already exist in the system, you have the option to add your own to document sections as well.

The **Custom** tab is available if the **Free-Form Allowed** option is selected for the section based on the template setup. Enter information for the objective, such as the title. Use the **Items** section in the template to select the fields to appear on the **Custom** tab for you to enter information about the objective.

Enter information for the custom objective.

Enter alignment information of the objective, if the **Align Items** option is enabled for the section in the template setup.

Field or Control	Description
Add to List	Use this button to save the objective you created temporarily to the list. After that, the system clears the page for you to enter a new business objective as needed. If you use the Save button instead of the Add to List button, the system displays a message asking if you wish to save the custom objective and any other objectives previously added to the list.

Field or Control	Description
Clear	Use this button to delete content from the page and enter a new business objective.

<Section Name> in List Page

Use the <Section Name> in List page (EPO_MAIN_ITEMS_SCF) to view or remove items from the document section.

Navigation:

Select the **Selected List** icon on the Add Objectives - Select / Create Objectives Page.

This example illustrates the fields and controls on the <Section Name> in List page.

Employee Commitment in List		×
These objectives will be added to the document.		
Evaluate Employee Benefits Pre-defined		
		 Remove All

Each row displays the business objective title and type.

(For pre-defined business objectives) If you have added a business objective to the list from the search results, it will not show up in future search results even if it is a match.

You can delete business objectives (individually or in bulk) from the list.

Note: Deleted pre-defined business objectives will be available again on the pre-defined list. Deleted custom business objectives will be discarded.

Document Details Page

Use the Document Details page (EPO_DOC_DETAILS_FL) to view and edit document details.

Navigation:

- Select the **Document Details** link on the [Business Objectives Document Page](#).
- Select *Update Document Details* from the **More Actions** menu of a document.

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

Document Details

In Progress - Assigned

2023 Business Objectives Finance and Administration

Finance and Administration • Jean Parsons

Edit

Objective

Plan 2023 Objective Plan

Period: 01 January 2023 - 31 December 2023

Effective Date 05/23/2023

Department Finance and Administration

ID: 13000

Template Corporate Objectives Template

Document

Title 2023 Business Objectives Finance and Administration

Publication Due Date 06/30/2023

Comments

Ownership

Owner Name Jean Parsons

Owner Title Chief Finance Officer

Alternate Editor Betty Locherty

This page lists the information used to create business objective document, such as the associated objective plan and template, effective date, publication due date, and ownership data.

Field or Control	Description
Edit	Select to make the page editable. The border line style is changed from solid to dotted when the page is in edit mode. Certain document details are available for update, including the document title, comments, and alternate editor.

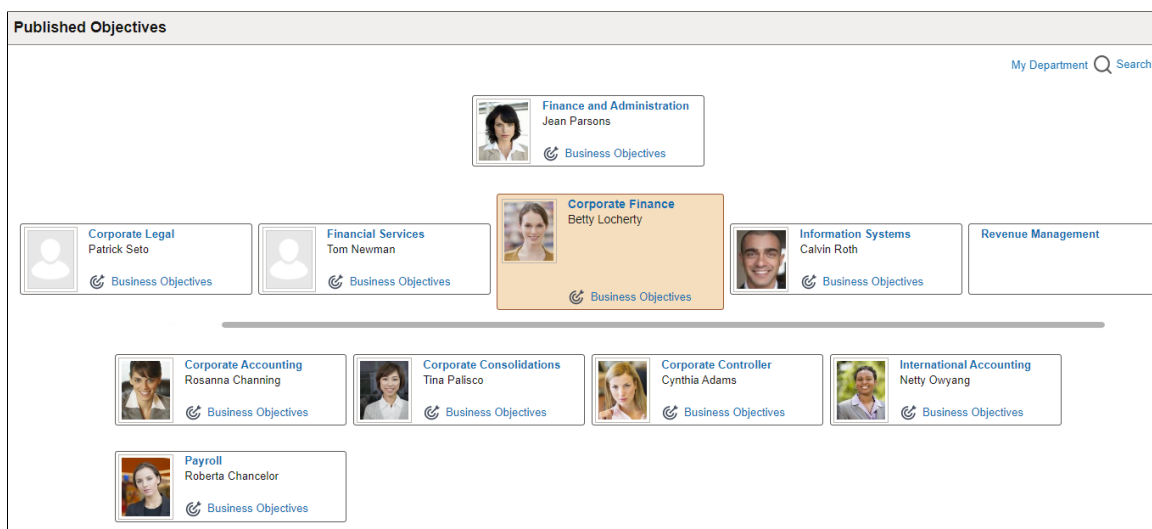
Published Objectives Page

Use the Published Objectives page (EPO_ORG_CHART_FL) to view published business objectives from other departments or positions.

Navigation:

Select *View Published Objectives* from the **More Actions** menu of a document.

This example illustrates the fields and controls on the Published Objectives page.



From the tree hierarchy that is displayed, the department or position of the document from which you selected to view published objectives appears as the focus node, which is larger in size and in another color. The hierarchy supports up to 3 tiers, one above the focus node and one below (if applicable).

The manager can use this page to verify if their direct-report managers have created business objectives as expected, or review business objectives from the upper or adjacent nodes in the organization to check that the business objectives the manager is working on are aligned properly.

Field or Control	Description
My Department or My Position	Select to return to the initial focus node.

Field or Control	Description
Search	Select to look up business objective documents by department name (or position name) or business objective document owner. Select a search result to access the corresponding node that is now in focus. A badge appears to indicate the number of matches in the search results.
<department or position name node>	Select to view and navigate the updated tree hierarchy with the selected department or position as the focus node.
Business Objectives	Select this link to view the corresponding business objective document of the node on the Business Objectives Document Page. Select the Close button on the page title banner to return to the hierarchy. This link does not appear if the node does not have a published business objective document with a matching objective plan.

Business Objectives Document Page

Use the Business Objectives Document page (EPO_VIEW_PAGE_FL) to preview or view documents in a formatted manner.

Navigation:

- Select *Preview Document* or *View Document* from the **More Actions** menu of a document.
- Select the **Business Objectives** link from a node on the Published Objectives page.

This example illustrates the fields and controls on the Business Objectives Document page.

Business Objectives Document

Plan

2023 Business Objectives

Template

Corporate Objectives Template

01 July 2022 - 31 December 2023

2023 Business Objectives Corporate Finance

 **Betty Locherty**
Finance Director • Corporate Finance

Objective

Demonstrate Customer Respect and Loyalty

Description

Continue to earn customer respect and loyalty by consistently providing the highest quality and value to our customers.

Measurement

Maintain an average score of Exceeds Expectations on the quarterly customer loyalty surveys.

Due Date

31 December 2023

Status

In Progress

Percent Complete

35%

Aligned To

Demonstrate Customer Respect and Loyalty 

Customer Loyalty Goals

Increase customer satisfaction by 10%

Customer Loyalty Goals

Reduce Customer Complaints by 5%

Customer Loyalty

Field or Control	Description
	Select to view the alignment of the current objective to other corporate or departmental objectives in the upper hierarchy on the Alignment Chain Page .

Notify Owner Page

Use the Notify Owner page (EPO_NOTIFY_SCF) to send notifications to business objective document owners.

Navigation:

Select *Notify Owner* from the **More Actions** menu of a document.

This example illustrates the fields and controls on the Notify Owner page.

The screenshot shows a web form titled "Notify Owner". At the top left is a "Cancel" button, and at the top right is a "Send" button. The form body contains the following elements:

- A "To" field with a small profile picture icon and the text "Jean Parsons".
- A horizontal line separating the "To" field from the "Subject" field.
- A label "*Subject" followed by a text input field.
- A label "*Message" followed by a larger text area for the message body.
- A note at the bottom: "A link to view the business objectives document will be included in the body of the e-mail."

A small note in the top right corner of the form area reads: "* Indicates required field".

(Required) Enter a subject and message for the notification to be sent. The notification includes an auto-generated link to view the corresponding business objective document.

This option is not available if the logged on user is the document owner.

Business Objectives - <Date> Page

Use the Business Objectives - <Date> page (EPO_MAIN_FL) to view previous versions of business objective documents.

Navigation:

Select the **View History** icon from the Business Objectives Document page.

This example illustrates the fields and controls on the Business Objectives - <Date> page.

Business Objectives - 05 May 2023

(Inactive)

2023 Business Objectives Finance
Finance and Administration • Jean Parsons

[Document Details](#)

- Customer Loyalty**
 - ☐ **Demonstrate Customer Respect and Loyalty** 2
1 Jul 2023
- Profitability**
 - ☐ **Increase Profits to Create Shareholder Value** 2
1 Jul 2023
- Employee Commitment**
 - ☐ **Demonstrate Commitment to Employees** 2
1 Jul 2023

[↑ Back to Top](#)

Publish Page

Use the Publish page (EPO_PUB_OPTION_SCF) to submit documents for publication or publish documents directly.

Navigation:

Select the **Publish** button on the Business Objectives Document page.

This example illustrates the fields and controls on the Publish page.

[Cancel](#) **Publish** [Save](#)

To publish this document, you can submit the document to an administrator for review and publication, or publish the document without any administrator review.

Select 'Save' to save your changes and update the document status, or select 'Cancel' to return to the document without saving any changes.

☐ **Submit document for publication**
☐ **Publish document**

Managers or alternate editors have the option to publish their business objective documents if the **Allow Managers or Alternate Editors to publish documents** option is selected on the ePerformance Installation - Objective Pages Page.

Important! Note that managers or alternate editors can only publish business objective documents that have never been published before, and cannot republish documents. If they make updates to *In Progress - Assigned* documents that were once published, they must submit the documents to the administrator to be republished.

Field or Control	Description
Submit document for publication	Select to submit the business objective document to the administrator for review and publication. The system sends notifications to administrators if the Notify administrator when page is submitted for publication option is selected on the ePerformance Installation - Objective Pages Page. Use the notification link to review the business objective document on the View Business Objectives page.
Publish document	Select to publish the business objective document directly without an administrator review. The system sends notifications to administrators if the Notify Administrator when a document is published option is selected on the ePerformance Installation - Objective Pages Page. Use the notification link to review the business objective document on the View Business Objectives page.

Edit Items - <Objective Name> Page

Use the Edit Items - <Objective Name> page (EPO_MAIN_ITMED_FL) to update business objectives.

Navigation:

Select the title of a business objective from a document.

This example illustrates the information and controls on the Edit Items - <Objective Name> page.

Edit Items

< 1 of 2 >

Employee Commitment

Demonstrate Commitment to Employees

Pre-defined • 1 Employee Commitment Goals

Objective

Title

Demonstrate Commitment to Employees

Description

Continuously demonstrate our commitment to employees by fairly promoting and rewarding employees based upon their performance and loyalty to the organization.

Measurement

Maintain an overall score of Exceeds Expectations on our yearly Employee Satisfaction Survey.

Due Date

07/01/2023

Status

In Progress

Percent Complete

50

Align Employee Commitment to Business Objectives

Title

2023 Business Objectives Finance

Section

Employee Commitment

Aligned To

Demonstrate Commitment to Employees

Employee Commitment Goals

Pre-defined

Title

Increase educational courses provided

Description

Field or Control	Description
	Select to save the page.
	Select to view the list of actions that are applicable to the business objective and select an action to perform. See Item-Level More Actions.

Objective

Update the basic information of the objective, such as the due date and status. The availability of fields is controlled by the definition of the corresponding section on the Objective Template Definition page.

Align <section name> to Business Objectives

Update the alignment information of the objective, if the **Align Items** option is enabled for the corresponding section on the Objective Template Definition page.

Field or Control	Description
Aligned To	Select an applicable corporate or departmental business objective to align to. Depending on the template setup, the system lists the business objectives from either the same section or all sections of the business objective document of the next-level-up department or position. Note: The system displays the <i>Alignment is not available</i> message when alignment cannot occur, for example, when the document listed in the Title field has been unpublished.
	Select to view the alignment of the current objective with its corporate or departmental objectives on the Alignment Chain Page .

Sub-Items

The **Sub-Items** section appears if the **Enabled Sub-Items** option is selected for the section based on the template setup. You can add custom sub-items if the **Free-Form Allowed** option is selected.

The label of this section is configurable in the template.

Note: You can add both pre-defined and custom sub-items to pre-defined objectives; however, only custom sub-items can be added to custom objectives.

Field or Control	Description
Add	Select to add sub-items. Select: <i>Add Pre-defined</i> to add preset sub-items on the <Section Name> - Goals Page. <i>Add Your Own</i> to enter the title and brief description of your custom sub-item in the fields that appear on the page and save the page. To add another custom sub-item, select the Add link and <i>Add Your Own</i> again.
Pre-defined or Custom	This label identifies the type of the sub-item shown.
	Select to delete the corresponding sub-item.

<Section Name> - Goals Page

Use the <Section Name> - Goals page (EPO_MAIN_SBITM_SCF) to add pre-defined sub-items to objectives.

Navigation:

Select the **Add** link and then *Add Pre-defined* on the Edit Items - <Objective Name> Page.

This example illustrates the fields and controls on the <Section Name> - Goals page.

The screenshot shows a web interface titled "Profitability Goals". At the top left is a "Cancel" button, and at the top right is a "Done" button. Below the title bar, there is a "Title" section with a search input field containing the text "Search Profitability Goals" and a right-pointing arrow button. Below the search field are two links: "Select All" and "Deselect All". To the right of these links, it says "1 row". Below this is a list item with a checkbox and the text "Cut operational expenses by 3%".

Search and select sub-items for the associated objective.

You can add from the list that is displayed, or look up and add sub-items by title. Added sub-items will no longer show on this list.

Employees Aligned to Organizational Objectives Page

Use the Employees Aligned to Organizational Objectives page (EPO_ALIGN_SUM_FL) to view the number of business objective alignments for employees.

Navigation:

Select *Alignment Analytics* from the **More Actions** menu of a document section.

This example illustrates the fields and controls on the Employees Aligned to Organizational Objectives page.



This chart displays, for each business objective included in the specified section, the number of employees whose performance documents contain items that have aligned to that business objective. This information is available to published documents only.

Related Links

[Creating Objectives Summary Data](#)

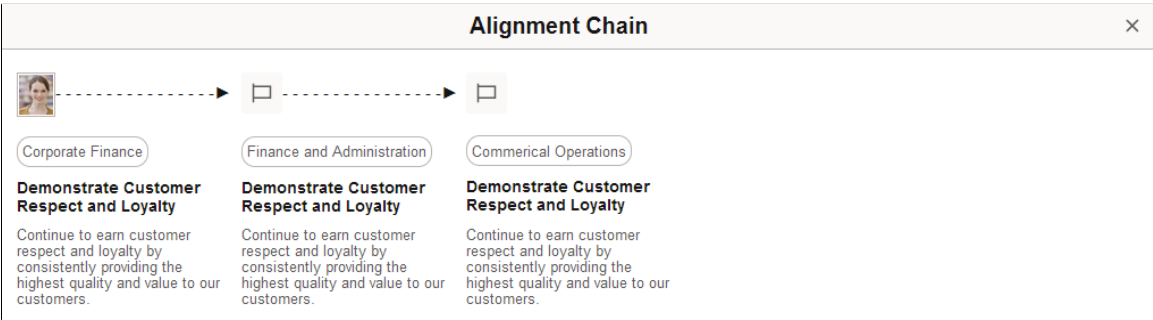
Alignment Chain Page

Use the Alignment Chain page (EPO_ALIGN_CHN_SCF) to view the alignment of the current objective to other corporate or departmental objectives in the upper hierarchy.

Navigation:

- Select *Alignment Chain* from the **More Actions** menu of a business objective.
- Select the **Alignment Chain** icon of a business objective on the Edit Items - <Objective Name> page or the Business Objectives Document page (view or preview document).

This example illustrates the fields and controls on the Alignment Chain page.



The chain begins with the current business objective being viewed on the left. The next-level-up objectives that it aligns with appear on the right. This link between multiple business objectives provides visibility of business strategies and the objectives supporting them.

Cascade Items Page

Use the Cascade Items page (EPO_CASC_PARAM_SCF) to select business objectives to cascade to performance documents of your team.

Navigation:

Select *Cascade Items* from the **More Actions** menu of a document section.

This example illustrates the fields and controls on the Cascade Items page.

Cancel Cascade Items Submit

* Indicates required field

2023 Business Objectives Corporate Finance
Corporate Finance • Elizabeth (Betty) Locherty

Select objective items to cascade to your team's performance documents. Enter the performance document type and section you want to update. Select the run settings then select Submit to initiate the cascade process.

Objective

Objective Plan 2023 Business Objectives
Department Corporate Finance
Section Type Customer Loyalty

Items

Select All Deselect All

☒ Demonstrate Customer Respect and Loyalty

Document

*Document Type Annual Review
*Section Type Goals & Objectives
*Period Begin Date 07/01/2022
Period End Date 12/31/2023

Settings

*Cascade Run Type Preview Cascade Items [Preview Item Report](#)
*Cascade Levels One
Overwrite existing item? Yes

Managers can cascade business objectives to their employees' performance documents by running the Cascade Objective Items (EP_CASCADE) process directly from business objective document sections. Administrators can also run this process to cascade business objectives to performance documents for selected managers on a run control page. For more information about the Cascade Objective Items process, refer to the [Cascading Objective Items](#) topic.

The system delivers notification options on the [ePerformance Installation - Objective Pages Page](#) to notify users when items are cascaded. They include:

- **Notify Administrator when items are cascaded:** when enabled, the system sends notifications to administrators after the manager-initiated Cascade Objective Items process has cascaded items to target performance documents. Select the notification entry or link to review the corresponding cascade process details on the [Cascaded Items Page \(Read-only\)](#).
- **Notify Manager when Objective Item is cascaded to their document:** when enabled, the system sends notifications to managers after:
 - The Cascade Objective Items process (initiated by managers themselves) has completed, or
 - The Cascade Objective Items process (initiated by administrators) has cascaded items to performance documents of their employees.

Select the notification entry or link to review the corresponding document on the [Performance Document Page](#).

- **Notify Employee when Objective Item is cascaded to their document:** when enabled, the system sends notifications to employees after items have been cascaded to their own performance documents. Select the notification entry or link to review the corresponding document on the [Performance Document Page](#).

<i>Field or Control</i>	<i>Description</i>
Submit	Select to submit the Cascade Objective Items process using the specified parameters. Note: After submission, a status message appears next to the corresponding section title on the business objective document. This message indicates when the process was last submitted or completed for the section. Reload the browser page to refresh the process status as needed. When the process is completed, select <i>Cascade Items</i> from the More Actions menu to review the Cascade Items report.

Objective

This section lists all items included in the specified business objective document section. Select one or more items to cascade to performance documents.

Note: All items of the specified document section are always available for selection, whether or not they have been cascaded previously.

Document

Use this section to specify parameters of the target performance documents to which selected items are cascaded.

<i>Field or Control</i>	<i>Description</i>
Document Type	Select the applicable document type. Document types that are associated with the objective plan displayed in the Objective section are available for selection. See Also Document Types Page.
Section Type	Select the section of the documents where items are to be cascaded. Choose from sections with the <i>Business Objectives</i> special processing in template definitions associated with the selected document type. See Also Template Definition - Structure Page.

Field or Control	Description
Period Begin Date and Period End Date	Specify the review period of documents to be included in the item cascading process.

Settings

Field or Control	Description
Cascade Run Type	Select: <i>Preview Cascade Items</i> if you want to preview the results of the process in a report but not cascade selected items to matching documents yet. Note: Only the <i>Preview Cascade Items</i> option is available when you run the cascade process on the specified document section for the first time. <i>Confirm Cascade Items</i> if you want to run the process to cascade selected items to matching documents and view the results in a report.
Preview Item Report or Cascade Item Report	Select to view the Cascade Item report (EP_CASCADE.pdf) on a new browser window or tab after the completion of the corresponding process. The Cascade Item report lists the documents to which each selected item will be or is cascaded when the process completes, based on the selected run type. If an item cannot be cascaded to a document (for example, item already exists and overwrite not allowed, or document is either canceled or pending approval), the reason is displayed in the report. If a document is in the Evaluation step and an item will be cascaded to both the employee's self-evaluation and the manager evaluation, the user role is specified in its associated document entries as well. Note: Administrators can review a list of Cascade Objective Items processes that were run by managers on the Review Manager Cascaded Items Page.

Field or Control	Description
Cascade Levels	Indicate the number of hierarchical levels that the process applies. Select: <i>One</i> to cascade items down one level to matching documents of your direct reports only. <i>All</i> to cascade items down all levels to matching documents of all your direct and indirect reports.
Overwrite existing item	Select <i>Yes</i> if one or more selected items already exist on the target documents and you want to replace them with the ones that are being cascaded. Use this option if changes were made to items on the business objective document after they were last cascaded to target documents. However, note that the overwrite option also clears any ratings and comments already added to the existing items. Select <i>No</i> to not cascade items if they already exist on the target documents.

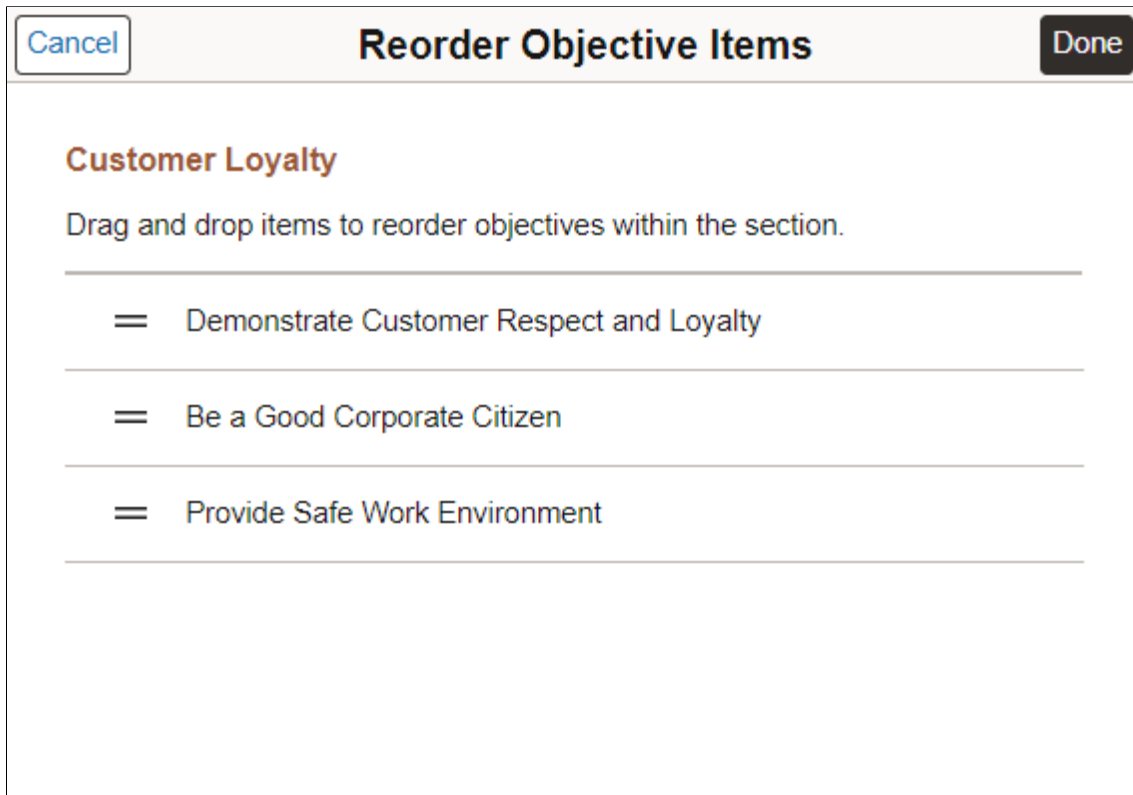
Reorder Objective Items Page

Use the Reorder Objective Items page (EPO_MAIN_REORD_SCF) to change the order of objectives displayed in document sections.

Navigation:

Select *Reorder Objectives* from the **More Actions** menu of a document section.

This example illustrates the fields and controls on the Reorder Objective Items age.



Reorder Objective Items

Customer Loyalty

Drag and drop items to reorder objectives within the section.

- = Demonstrate Customer Respect and Loyalty
- = Be a Good Corporate Citizen
- = Provide Safe Work Environment

To reorder the list of objectives in a section, drag and drop an item to the desired position on the list.

Note: Dragging and dropping of items is not supported in screen reader mode. To reorder items, enter a sequence number for each item. The item with the lowest number appears first on the list.

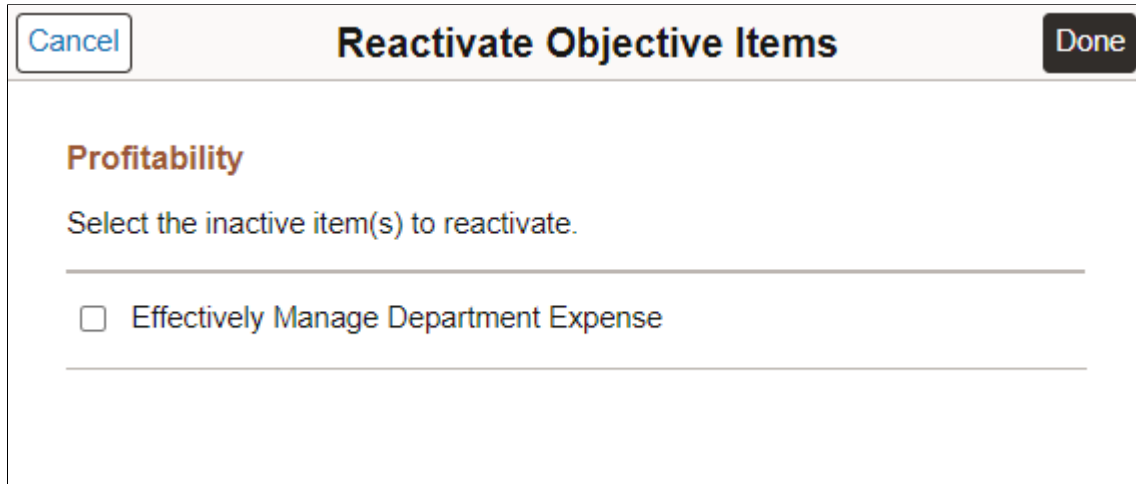
Reactivate Objective Items Page

Use the Reactivate Objective Items page (EPO_MAIN_REACT_SCF) to reactivate objectives in document sections.

Navigation:

Select *Reactivate Items* from the **More Actions** menu of a document section.

This example illustrates the fields and controls on the Reactivate Objective Items age.



The screenshot shows a dialog box titled "Reactivate Objective Items". It has a "Cancel" button on the top left and a "Done" button on the top right. Below the title bar, the word "Profitability" is displayed in a bold, orange font. Underneath, the text "Select the inactive item(s) to reactivate." is shown. A horizontal line separates this text from a list of items. One item is visible: a checkbox followed by the text "Effectively Manage Department Expense". Another horizontal line is below this item.

When you delete an existing objective from an in-progress document that was previously published, the system inactivates the objective, which can no longer be visible from the saved document.

This page lists the inactive objectives for the specified section. Select the objectives you want to reactivate and select the **Done** button.

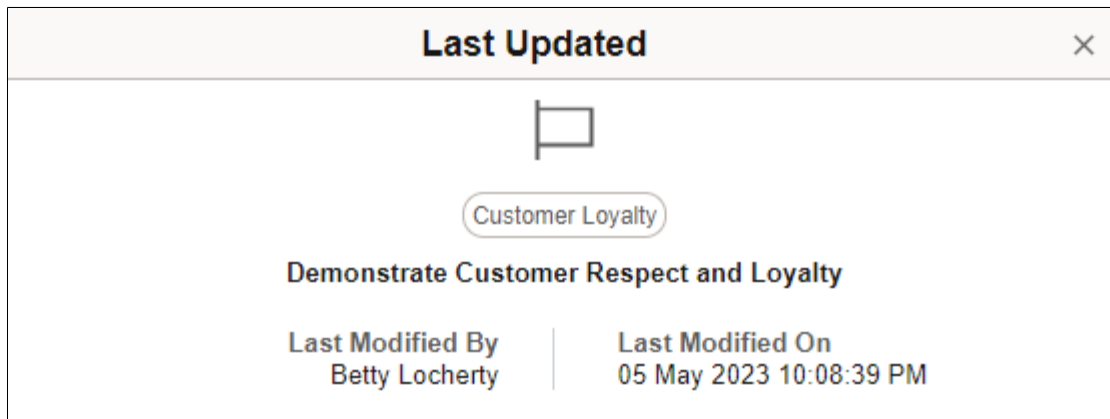
Last Updated Page

Use the Last Updated page (EP_AUDIT_SCF) to view the audit information of business objectives.

Navigation:

Select *Last Updated* from the **More Actions** menu of a business objective.

This example illustrates the fields and controls on the Last Updated page for a document.



The screenshot shows a page titled "Last Updated" with a close button (X) in the top right corner. Below the title bar, there is a small icon of a document with a flag. Underneath the icon is a rounded rectangle containing the text "Customer Loyalty". Below this, the text "Demonstrate Customer Respect and Loyalty" is displayed in a bold font. At the bottom, there are two columns of information: "Last Modified By" with the name "Betty Locherty" and "Last Modified On" with the date and time "05 May 2023 10:08:39 PM".

This page shows the section of the specified business objective, the date and person by whom it was last updated.

Viewing Performance Insights

Viewing Performance Insights

Performance Insights provides administrators and managers the ability to review the status of performance reviews for employees and analyze employees' performance.

Based on user privileges, administrators and managers can access the visualizations delivered in Performance Insights to review the status of employee documents, identify documents with overdue steps and send follow-up reminders, look at employees' performance and analyze it in relation to their time in the position and compa-ratio. Managers can also monitor the progress of employees' goals and competencies.

These performance dashboards are built on the PeopleSoft Insights platform, which relies on an underlying analytics engine and search engine. Performance data that is visible on the administrator's and manager's dashboards come from various search indexes.

This video provides an overview of the Performance Insights feature:

Video: [Image Highlights, PeopleSoft HCM Update Image 46: Performance Insights](#)

This topic provides an overview of how to set up the dashboards for performance insights, lists common elements and controls, and discusses the Performance Insights dashboards.

Understanding PeopleSoft Insights

PeopleSoft Insights is an analytical engine that provides visual reports (visualizations) in the form of charts, tables, graphs and so on. The visualizations are based on queries that retrieve data from the PeopleSoft Search Framework.

These videos provide an overview of the PeopleSoft Insights feature:

Video: [Insights with PeopleSoft](#)

Video: [PeopleSoft HCM Insights](#)

For information on Insights dashboards, see:

- “Understanding PeopleSoft Insights” (Application Fundamentals)
- *PeopleTools Search Technology*: "Monitoring PeopleSoft Search Framework and OpenSearch" and "Working with Insights Dashboards for PeopleSoft Application Data" documentation.

Pages Used to View Performance Insights

Page Name	Definition Name	Usage
<u>Performance Insights Tile</u> (for administrators)	HC_EP_PERF_INSIGHT_FL_LINK (this is the cref for the tile)	Access analytics on the Performance Insights dashboard.
<u>Performance Insights Dashboard</u> (for administrators)	HC_EP_PERF_INSIGHT_FL_LINK	Review and analyze employees' document and performance data using visualizations.
<u>Document Insights Tile</u> (for administrators)	HC_EP_DOC_ANALYTICS_FL (this is the cref for this tile)	Access the Document Insights dashboard.
<u>Document Insights Dashboard</u> (for administrators)	HC_EP_DOC_ANALYTICS_FL	Review and analyze the status information of performance documents for employees in the organization.
<u>Performance Insights Tile</u> (for administrators)	HC_EP_PERF_ANALYTICS_FL (this is the cref for the tile)	Access the Performance Insights dashboard.
<u>Performance Insights Dashboard</u> (for administrators)	HC_EP_PERF_ANALYTICS_FL	Review and analyze the performance of employees in the organization.
<u>Team Document Insights Tile</u> (for managers)	HC_EP_TMDOC_ANALYTICS_FL (this is the cref for the tile)	Access the Team Document Insights dashboard.
<u>Team Document Insights Dashboard</u> (for managers)	HC_EP_TMDOC_ANALYTICS_FL	Review and analyze the status information of performance documents for employees on their teams.
<u>Team Performance Insights Tile</u> (for managers)	HC_EP_TMPERF_ANALYTICS_FL (this is the cref for the tile)	Access the Team Performance Insights dashboard.
<u>Team Performance Insights Dashboard</u> (for managers)	HC_EP_TMPERF_ANALYTICS_FL	Review and analyze the performance of employees on their teams.

Understanding How to Set Up Insights Dashboards for Performance Analytics

Before administrators and managers can access the visualizations for Performance Insights, the following steps should be performed:

1. Deploy these performance indexes:
 - *HC_EP_PERFORMANCE_ADM* (Admin Performance Analytics)
 - *HC_EP_PERFORMANCE_MGR* (Mgr Performance Analytics)

- *HC_EP_PERFORM_ITEM_MGR* (Performance Analytics Manager Item)

(PeopleTools > Search Framework > Search Admin Activity Guide > Administration > Deploy/Delete Object)

2. Build deployed performance search indexes.

(PeopleTools > Search Framework > Search Admin Activity Guide > Administration > Schedule Search Index)

3. Deploy performance tiles and dashboards:

- Administrator:

For Document Insights: *Document Insights Tile* and *Document Insights* dashboard.

For Performance Insights: *Performance Insights Tile* and *Performance Insights* dashboard.

- Manager:

For Team Document Insights: *Team Document Insights Tile* and *Team Document Insights* dashboard.

For Team Performance Insights: *Team Performance Insights Tile* and *Team Performance Insights* dashboard.

(PeopleTools > Search Framework > Administration > Deploy Insights Dashboards)

Note: The full index must be run before the dashboard can be deployed.

4. Assign these roles for users to access insights tiles and dashboards:

- Administrator:

ePerformance HR Admin, which provides access to tiles and dashboards for documents and performance insights. The same role also allows users to view performance data presented on visualizations.

- Manager:

ePerformance Manager Fluid, which provides access to tiles and dashboards for team documents and team performance insights. The same role also allows users to view performance data presented on visualizations.

Fluid Dashboard - MSS ePerf, which provides access to the Team Performance dashboard, where the insights are located by default.

Real Time Indexes for Performance Insights Visualizations

The search indexes used in Performance Insights support real time indexing (RTI) with a minimum PeopleTools version. When enabled, RTI allows real-time updates to the indexed data to display visualizations using the latest information.

Search Definition	Minimum PeopleTools Release	Usage
HC_EP_PERFORMANCE_ADM	8.59.10	Allows administrators to access Document Insights and Performance Insights dashboards.
HC_EP_PERFORMANCE_MGR	8.59.10	Allows managers to access Team Document Insights and Team Performance Insights dashboards (except visualizations for employee goals and competencies).
HC_EP_PERFORM_ITEM_MGR	8.60.11	Allows managers to view visualizations for employee goals and competencies on the Team Performance Insights dashboard.

For more information about Real Time Indexing, refer to *PeopleTools: Search Technology*, “Administering Real Time Indexing.”

Related Links

“Understanding PeopleSoft Insights Using PeopleSoft Search Framework” (Application Fundamentals)
 “Understanding Real Time Indexing in HCM” (Application Fundamentals)

Common Elements and Controls

This section lists the common elements and controls that are used in PeopleSoft Insights.

For more information on working with PeopleSoft Insights and filters, see *PeopleTools: Search Technology*, “Working with Insights Dashboards for PeopleSoft Application Data” documentation.

Search and Filter Options:

Note: Filtering options apply to all visualizations, which allows users to drill down on all the charts at once.

Field of Control	Definition
Search field	Enter a query to filter data, if applicable.

Field of Control	Definition
 (Change all filters) and + Add filter icon and link	Enter criteria to filter data on the visualizations. You can apply filters in a number of ways: • Enter queries in the Search field. • Use the + Add filter link to create filters using fields, operators and field values. • Use delivered filter fields. • Select a chart item from a visualization. • Use the filter options in document details grids to add or exclude items. • Use the legend to add or exclude items. Added filters are displayed next to the + Add filter link for reference. For example, when you click a chart item, the filter is automatically added to your filters list. If the selected chart item consists of more than one filter, the system will prompt you to apply any or all of them to the visualizations. Click the Change all filters icon for a list of actions that can be performed on <i>all</i> filters, for example, disable them temporarily, remove them permanently, or invert inclusion (show data that does not meet filter criteria). Click a filter item for a list of similar actions that can be performed on it individually.

Field of Control	Definition
 (Calendar) or Show dates icon and link	Select a different time period for the dashboard if needed. You can enter it manually, or choose from commonly used date ranges provided the system as well as recently used selections. When a new period is selected, all visualizations are refreshed automatically to reflect that change. If you have selected a commonly used date range, for example, <i>This week</i>, or <i>Last 30 days</i>, click the Show dates link to view the approximate date period in relation to the current date. For example, the current date is November 1 and the selected date range is <i>Year to date</i>. Clicking the Show dates link displays ~ <i>10 months ago</i> —> <i>now</i>, which indicates that the selected date range started from approximately 10 months ago and ends on the current date. Note: The document and performance insights dashboards for administrators and managers display data for documents that were last updated within the specified date range. Additional controls are also available to filter the document data you want to review on the dashboards.

Visualization Options:

When you pause over a visualization, the Options and Legend icons (if applicable) are displayed on the top right and bottom left corners respectively. Use them to inspect the chart or table and view the details of that visualization and toggle the legend display.

Field or Control	Definition
 (Options) icon	Click the Options icon to select one of these options: <i>Inspect</i>: Select this option to have a slide out page appear providing the details in a grid format. You can also download data from this page. <i>Maximize panel</i> or <i>Minimize</i>: Select <i>Maximize panel</i> to have the page display this visualization in full screen. Select <i>Minimize</i> to return to the dashboard and display all visualizations.
 (Toggle legend) icon	Click this icon to hide or display the legend for the chart, if available. You can click an item in the legend to change its color, or add it as a filter (if applicable).

Field or Control	Definition
Chart item (bar, pie slice, and so forth)	Pause over a chart item, such as a bar item or pie slice, to view a summary of details for that item. Select a chart item to add a filter for it to apply to all visualizations.

Performance Insights Tile

Administrators use the Performance Insights tile to access analytics on the Performance Insights dashboard.

Navigation:

From the **Talent Administrator** home page, select the **Performance Insights** tile.

This example illustrates the Performance Insights tile.



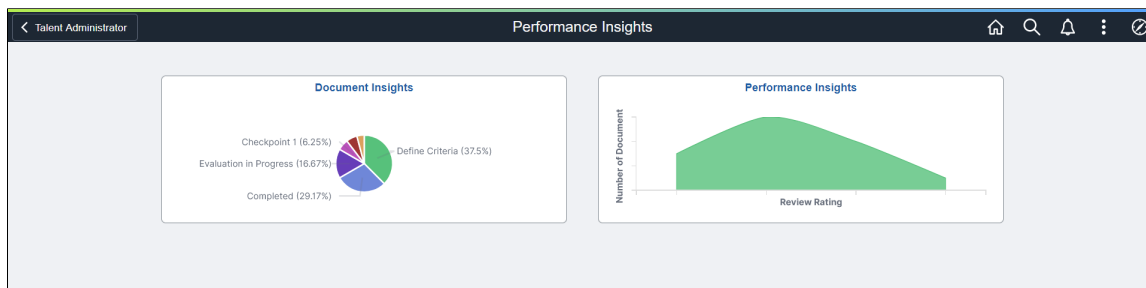
Performance Insights Dashboard

Administrators use the Performance Insights dashboard to review and analyze employees' document and performance data using visualizations.

Navigation:

Click the **Performance Insights** tile.

This example illustrates the Performance Insights dashboard.



The Performance Insights dashboard includes these tiles:

- [Document Insights Tile](#)
- [Performance Insights Tile](#)

Important! For optimal performance, only the first 500 rows of data are displayed. Use filters to refine the set of data you wish to visualize on the dashboard.

Warning! Dashboards may not render properly if you access them using unsupported platforms.

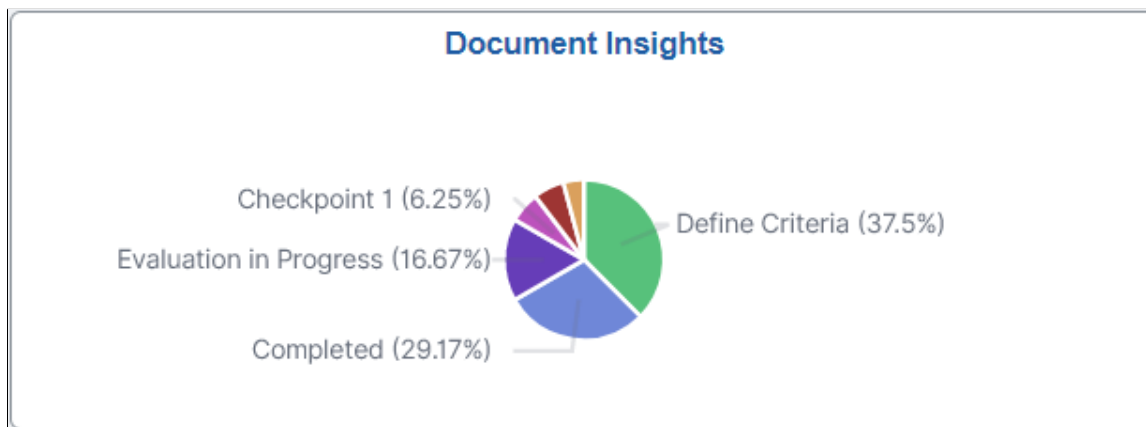
Document Insights Tile

Administrators use the Document Insights tile to access the Document Insights dashboard.

Navigation:

The Document Insights tile is located on the [Performance Insights Dashboard](#).

This example illustrates the Document Insights tile.



The Document Insights tile displays the **Document Status** visualization, which gives a snapshot of the status of current and completed documents included in the default time period.

Click this tile to access the [Document Insights Dashboard](#) and interact with employees' performance document data in the organization using visualizations.

Document Insights Dashboard

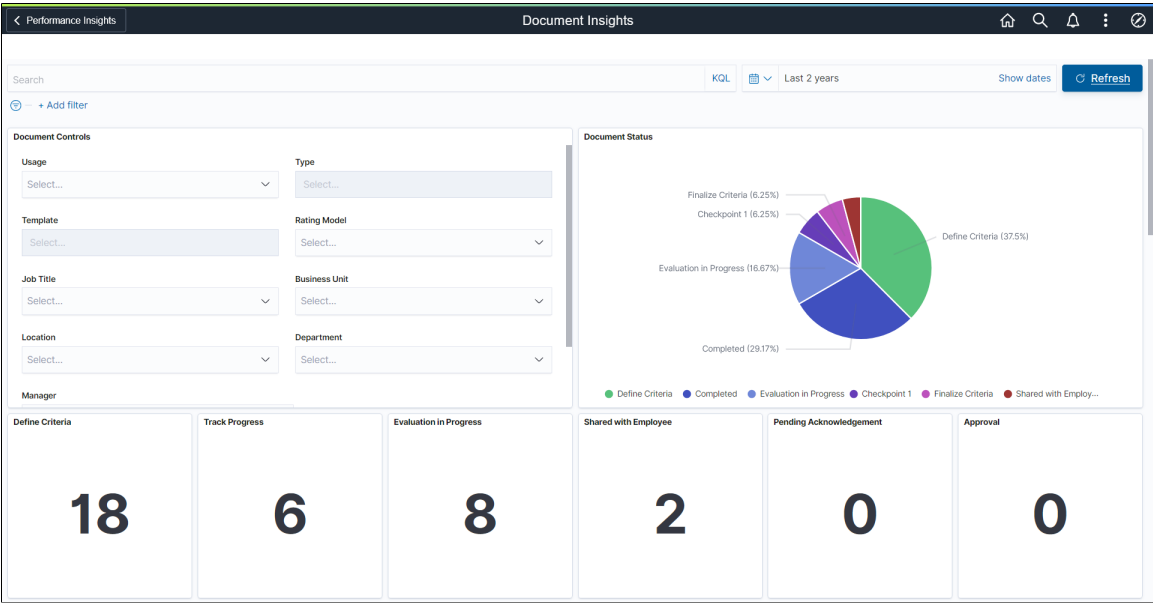
Administrators use the Document Insights dashboard to review and analyze the status information of performance documents for employees in the organization.

Navigation:

Click the **Document Insights** tile.

Note: Administrators are given access to data on this dashboard based on their row-level security.

This example illustrates the Document Insights dashboard (1 of 5).



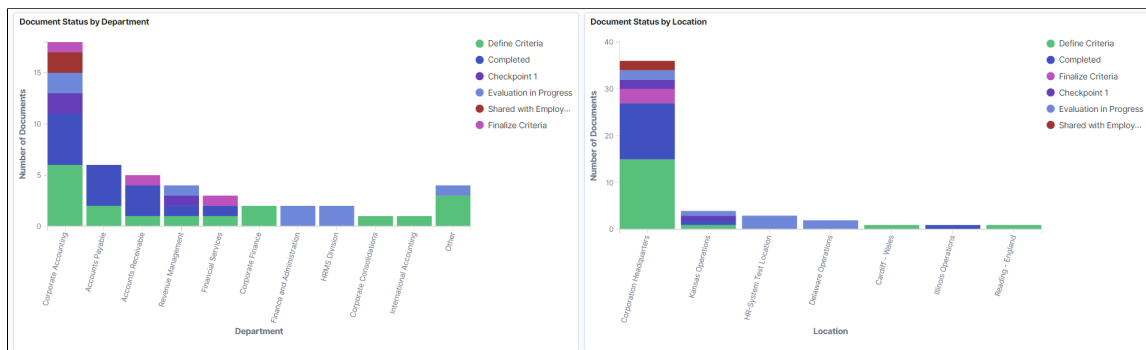
This example illustrates the Document Insights dashboard (2 of 5).

In-Progress Document Details										
Employee	Job Title	Department	Location	Type	Status	Period Begin Date	Period End Date	Next Due Date	Details	Employee ID
Abigail Smith	Billing Specialist	Revenue Management	Kansas Operations	Annual Review	Evaluation in Progress	Jan 1, 2022	Dec 31, 2022	Dec 1, 2022	Go to Document	KU0130
Christelle Stevenson	Manager-Accounting	Accounts Receivable	Corporation Headquarters	Annual Review	Finalize Criteria	Jan 1, 2022	Dec 31, 2022	Sep 2, 2022	Go to Document	KU0020
Christelle Stevenson	Manager-Accounting	Accounts Receivable	Corporation Headquarters	Annual Review	Define Criteria	Feb 1, 2023	Jul 31, 2023	Jan 12, 2023	Go to Document	KU0020
Cynthia Adams	Corporate Controller	Corporate Accounting	Corporation Headquarters	Performance Document	Evaluation in Progress	Jan 1, 2021	Dec 31, 2021	Dec 1, 2021	Go to Document	KU0101
Cynthia Adams	Corporate Controller	Corporate Accounting	Corporation Headquarters	Annual Review	Finalize Criteria	Feb 1, 2023	Feb 28, 2023	Oct 31, 2022	Go to Document	KU0101
Cynthia Adams	Corporate Controller	Corporate Accounting	Corporation Headquarters	Annual Review	Define Criteria	Feb 1, 2023	Jan 31, 2024	Jul 15, 2023	Go to Document	KU0101
Daryl Reese	Financial Analyst	Corporate Accounting	Corporation Headquarters	Annual Review	Evaluation in Progress	Jan 1, 2022	Dec 31, 2022	Feb 28, 2023	Go to Document	KU0044
Daryl Reese	Financial Analyst	Corporate Accounting	Corporation Headquarters	Annual Review	Checkpoint 1	Feb 1, 2023	Jul 31, 2023	Apr 22, 2023	Go to Document	KU0044
David Ho	Senior Financial Analyst	Financial Services	Corporation Headquarters	Annual Review	Finalize Criteria	Jan 1, 2022	Dec 31, 2022	Dec 31, 2022	Go to Document	KU0121
David Ho	Senior Financial Analyst	Financial Services	Corporation Headquarters	Annual Review	Define Criteria	Feb 1, 2023	Jul 31, 2023	Jan 12, 2023	Go to Document	KU0121

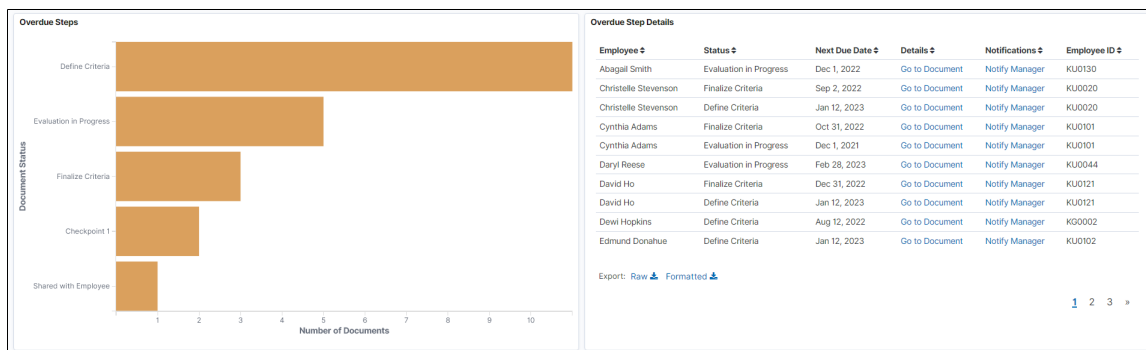
Export: [Raw](#) [Formatted](#)

1 2 3 4 »

This example illustrates the Document Insights dashboard (3 of 5).



This example illustrates the Document Insights dashboard (4 of 5).



This example illustrates the Document Insights dashboard (5 of 5).

Employee	Job Title	Department	Location	Type	Period Begin Date	Period End Date	Review Rating	Details	Employee ID
Alan Carr	Finance Specialist	Accounts Payable	Illinois Operations	Annual Review	Jan 1, 2021	Dec 31, 2021	Company Maker	Go to Document	KU0150
Brenton Francisco	Finance Specialist	Accounts Payable	Corporation Headquarters	Annual Review	Jan 1, 2021	Dec 31, 2021	Meets Expectations	Go to Document	KU0048
Chris Cameron	Finance Specialist	Accounts Payable	Corporation Headquarters	Annual Review	Jan 1, 2021	Dec 31, 2021	Exceeds Expectations	Go to Document	KU0151
Christelle Stevenson	Manager-Accounting	Accounts Receivable	Corporation Headquarters	Annual Review	Jan 1, 2021	Dec 31, 2021	Company Maker	Go to Document	KU0020
Daryl Reese	Financial Analyst	Corporate Accounting	Corporation Headquarters	Annual Review	Jan 1, 2021	Dec 31, 2021	Meets Expectations	Go to Document	KU0044
David Ho	Senior Financial Analyst	Financial Services	Corporation Headquarters	Annual Review	Jan 1, 2021	Dec 31, 2021	Needs Improvement	Go to Document	KU0121
Edmund Donahue	Manager-Accounting	Accounts Payable	Corporation Headquarters	Annual Review	Jan 1, 2021	Dec 31, 2021	Company Maker	Go to Document	KU0102
Joanna Strunsky	Finance Specialist	Accounts Receivable	Corporation Headquarters	Annual Review	Jan 1, 2021	Dec 31, 2021	Exceeds Expectations	Go to Document	KU0016
John Patterson	Manager-Revenue	Revenue Management	Kansas Operations	Annual Review	Jan 1, 2021	Dec 31, 2021	Exceeds Expectations	Go to Document	KU0131
Mei Lee	Accountant	Corporate Accounting	Corporation Headquarters	Annual Review	Jan 1, 2021	Dec 31, 2021	Meets Expectations	Go to Document	KU0076

Note: When you select filters or chart items, or modify the date range, the system dynamically updates all visualizations on the dashboard.

Document Controls

<i>Field or Control</i>	<i>Description</i>
Usage, Type, Template, Rating Model, Job Title, Business Unit, Location, Department, and Manager	Select to refine document data by one or more delivered filters, followed by the Apply changes button. Usage, Type, and Template fields work together. To filter by type, select a usage first. To filter by template, select a usage first and then a type.

Document Insights Visualizations

The Document Insights dashboard provides you with the following collection of interactive visualizations as an administrator to monitor the progress of employees' documents and identify the documents with steps that the employees did not complete by due date.

<i>Visualization</i>	<i>Description</i>
Document Status pie chart	This visualization displays the percentage distribution of current and completed documents by document status.
Document status metrics	These panels display number counts of current documents by document status. These numbers provide a quick update of where employees are with their performance reviews, and help identify potential issues or bottlenecks in the review cycle. Note: Metrics for sub-statuses are not displayed individually in panels. They are included in the metrics of their parent document statuses, for example, the Track Progress panel shows the combined metrics for <i>Checkpoint</i> and <i>Finalize Criteria</i> sub-statuses.
Document Status by Department vertical bar chart	This visualization displays the distribution of current and completed documents by document status and department. Pause over a bar item to view the number count.
Document Status by Location vertical bar chart	This visualization displays the distribution of current and completed documents by document status and location. Pause over a bar item to view the number count.
Overdue Steps horizontal bar chart	This visualization displays the distribution of current documents with missed steps by status.

Visualization	Description
Overdue Step Details grid	This grid lists the information of the documents that have missed steps. From the grid, you can view the missed due dates, navigate to the documents directly, and send reminders to the managers about the overdue steps.

In-Progress Document Details and Completed Document Details Grids

The **In-Progress Document Details** grid lists the information of employees' current documents that are presented in the visualizations of the dashboard.

The **Completed Document Details** grid lists the information of employees' completed documents for the specified time period.

Field or Control	Description
 (Sort column heading) icon	Click a column heading to sort grid rows by the column value in ascending or descending order.
 (Filter for value) and  (Filter out value) icons	These filter icons appear when you pause next to a field value. These icons are available for all column values in the grid, and provide a quick way to add filters to the dashboard. Click the Filter for value (+ magnify glass) icon to add the shown field value as a filter. For example, if you click to filter for a Department value, all visualizations will refresh to show employee documents for that department. Click the Filter out value (- magnify glass) icon to remove the shown field value from the filtering process. For example, if you click to filter out the <i>Human Resources</i> value in the Department column, visualizations will refresh to show information for all departments except <i>Human Resources</i>. Filters can be removed from the Filters area at the top of the page.

Field or Control	Description
Go to Document	Click to access the corresponding document in a new browser window or tab. (Administrator) The system displays the administrator view of the document when you access it from the administrator dashboard. Note: If you update the document, you need to rebuild the index for the changes to be reflected in these visualizations. When RTI is enabled, changes from the document will be updated in the indexes automatically in real time. See the Real Time Indexes for Performance Insights Visualizations section in this topic for the list of indexes that are RTI-enabled for the document and performance insights dashboards.
Export links: • Raw • Formatted	Click to export data from the grid into a .csv file format.

Related Links

[\(Fluid\) Working With ePerformance Documents](#)

Performance Insights Tile

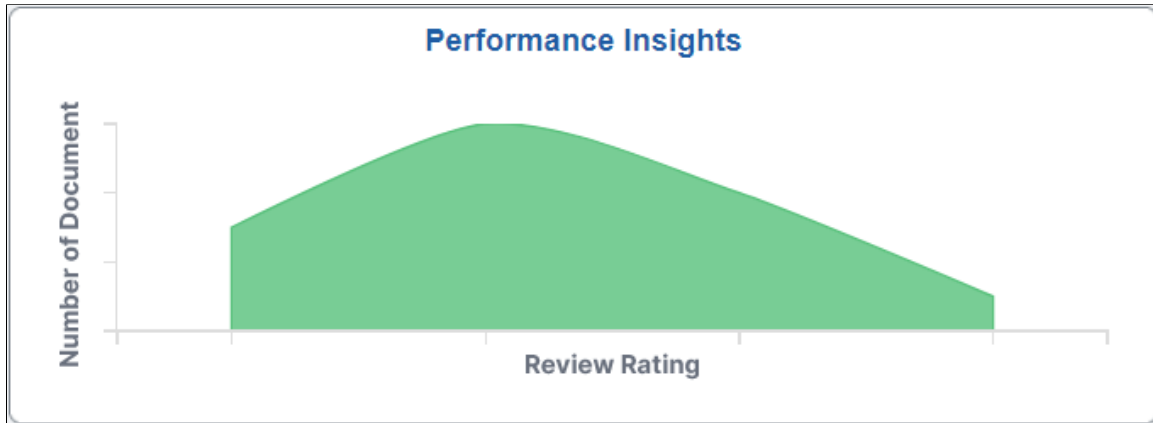
Administrators use the Performance Insights tile to access the Performance Insights dashboard.

Navigation:

The Performance Insights tile is located on the [Performance Insights Dashboard](#).

Note: Administrators are given access to data on this dashboard based on their row-level security.

This example illustrates the Performance Insights tile.



The Performance Insights tile displays the **Employee Performance** visualization, which gives a snapshot of employees' performance ratings based on their completed documents included in the default time period.

Click this tile to access the [Performance Insights Dashboard](#) and gain insight into the employee performance in the organization.

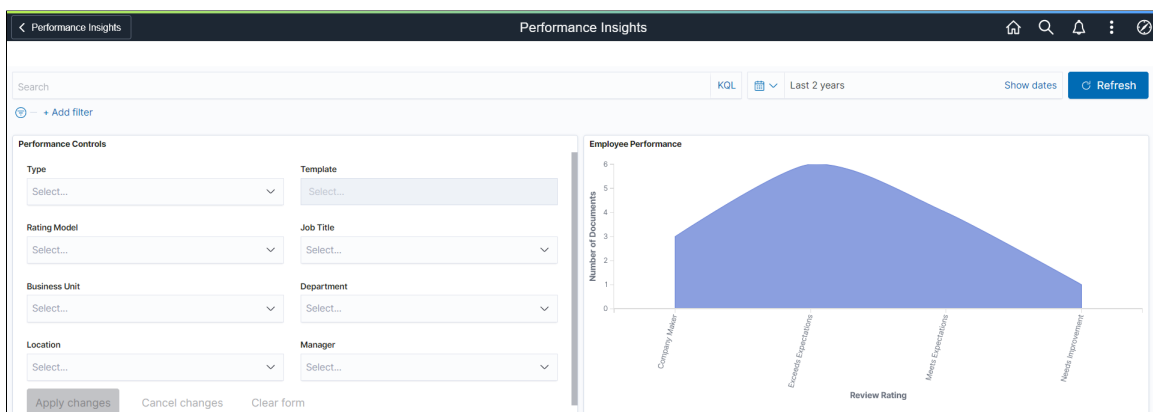
Performance Insights Dashboard

Administrators use the Performance Insights dashboard to review and analyze the performance of employees in the organization.

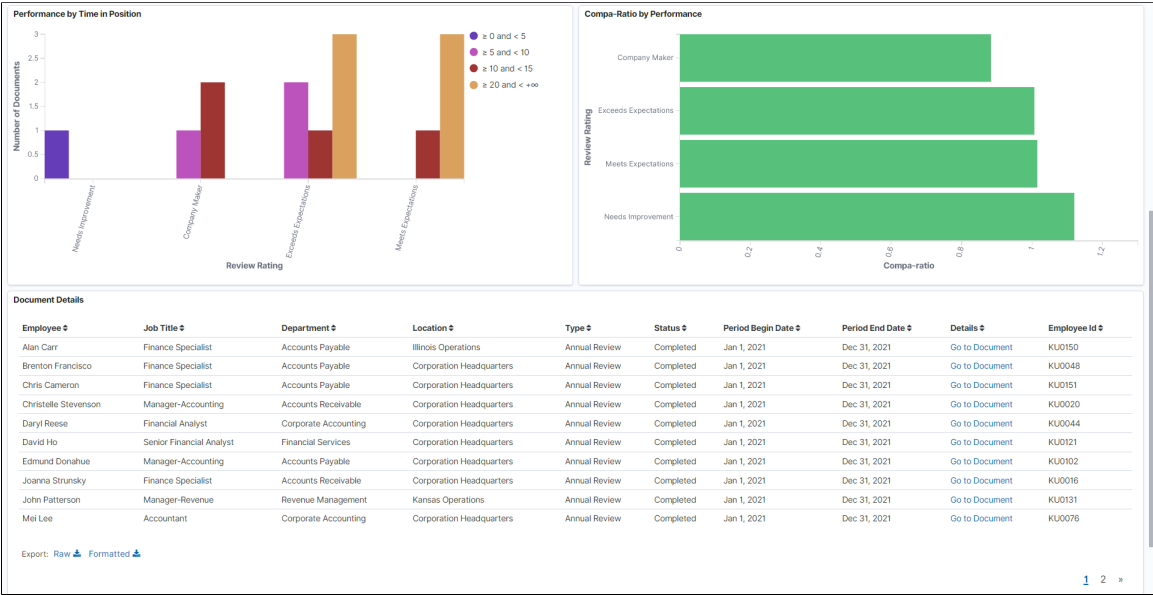
Navigation:

Click the **Performance Insights** tile.

This example illustrates the Performance Insights dashboard (1 of 2).



This example illustrates the Performance Insights dashboard (2 of 2).



Note: When you select filters or chart items, or modify the date range, the system dynamically updates all visualizations on the dashboard.

Performance Controls

Field or Control	Description
Type, Template, Rating Model, Job Title, Business Unit, Location, Department, and Manager	Select to refine document data by one or more delivered filters, followed by the Apply changes button. Type and Template fields work together. To filter by template, select a type first.

Performance Insights Visualizations

The Performance Insights dashboard provides you with the following collection of interactive visualizations as an administrator to review and analyze employees' performance in the organization.

Note: The **Performance Insights** dashboard displays data for completed documents with the *Performance* usage.

Visualization	Description
Employee Performance area chart	This visualization displays the distribution of employees' completed documents by review rating. Pause over the curve line to view the number count. This information comes from the manager's overall summary rating of the documents.
Performance by Time in Job vertical bar chart	This visualization displays the performance ratings of the employees and the number of years that they have been in their positions for that document cycle. Use this visualization to see how the performance of employees is relative to the time they serve in their positions.
Compa-Ratio by Performance horizontal bar chart	This visualization displays compa-ratio values by review rating. Use this visualization to gain insight into the performance of employees in relation to their compensation for that document cycle.

Document Details Grid

The **Document Details** grid lists the information of employees' documents that are presented in the visualizations of the dashboard.

Field or Control	Description
 (Sort column heading) icon	Click a column heading to sort grid rows by the column value in ascending or descending order.
 (Filter for value) and  (Filter out value) icons	These filter icons appear when you pause next to a field value. These icons are available for all column values in the grid, and provide a quick way to add filters to the dashboard. Click the Filter for value (+ magnify glass) icon to add the shown field value as a filter. For example, if you click to filter for a Department value, all visualizations will refresh to show employee documents for that department. Click the Filter out value (- magnify glass) icon to remove the shown field value from the filtering process. For example, if you click to filter out the <i>Human Resources</i> value in the Department column, visualizations will refresh to show information for all departments except <i>Human Resources</i>. Filters can be removed from the Filters area at the top of the page.

Field or Control	Description
Go to Document	Click to access the corresponding document in a new browser window or tab. (Administrator) The system displays the administrator view of the document when you access it from the administrator dashboard. Note: If you update the document, you need to rebuild the index for the changes to be reflected in these visualizations. When RTI is enabled, changes from the document will be updated in the indexes automatically in real time. See the Real Time Indexes for Performance Insights Visualizations section in this topic for the list of indexes that are RTI-enabled for the document and performance insights dashboards.
Export links: • Raw • Formatted	Click to export data from the grid into a .csv file format.

Related Links

[\(Fluid\) Working With ePerformance Documents](#)

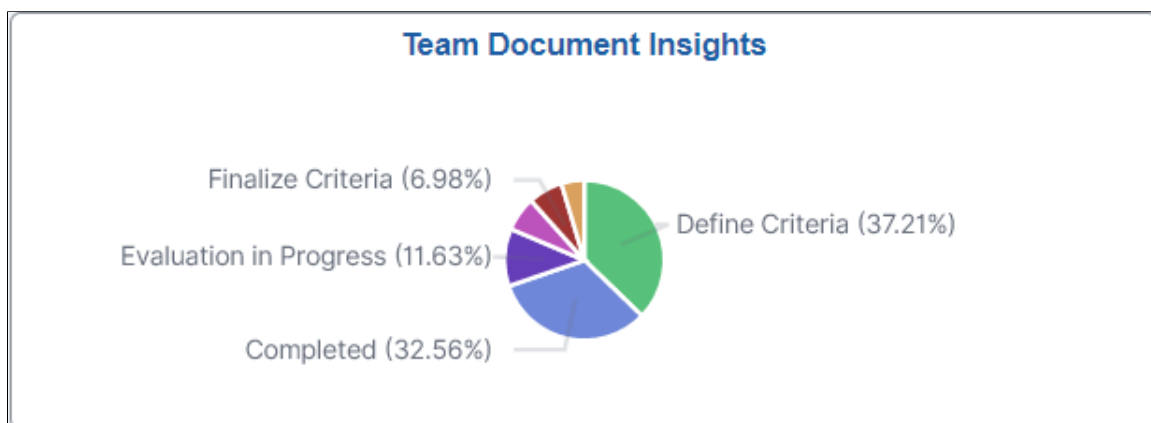
Team Document Insights Tile

Managers use the Team Document Insights tile to access the Team Document Insights dashboard.

Navigation:

The Team Document Insights tile is located on the [Team Performance Dashboard](#).

This example illustrates the Team Document Insights tile.



The Team Document Insights tile displays the **Documents by Review Status** visualization, which gives a snapshot of the status of current and completed documents included in the default time period.

Click this tile to access the [Team Document Insights Dashboard](#) and interact with the performance document data of the manager's direct and indirect reports using visualizations.

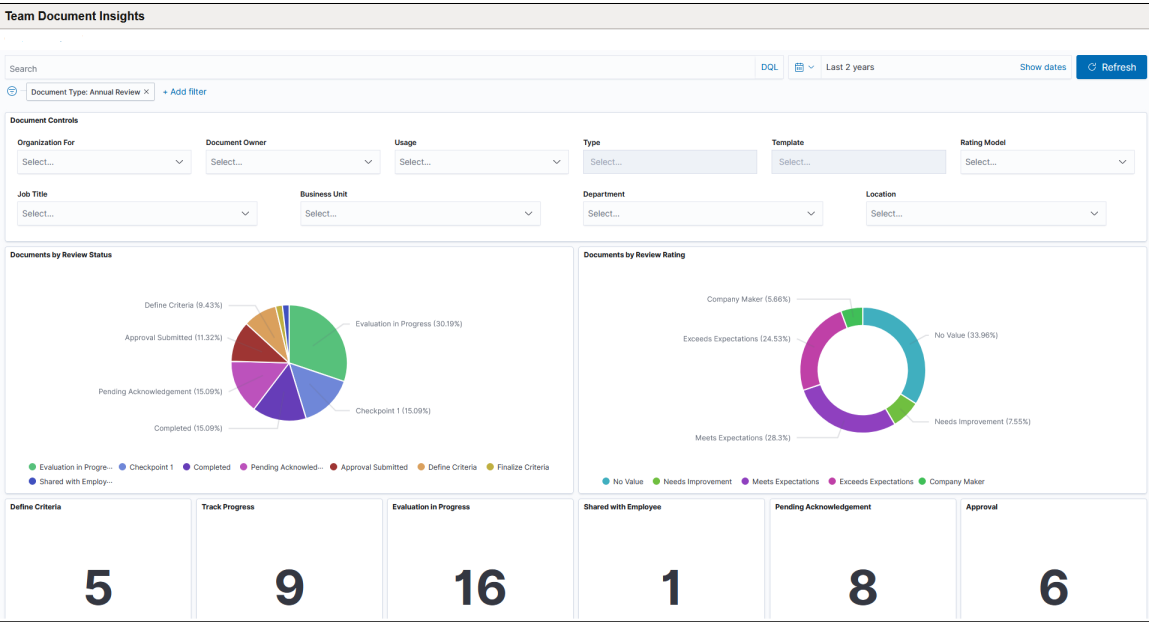
Team Document Insights Dashboard

Managers use the Team Document Insights dashboard to review and analyze the status information of performance documents for employees on their teams.

Navigation:

Click the **Team Document Insights** tile.

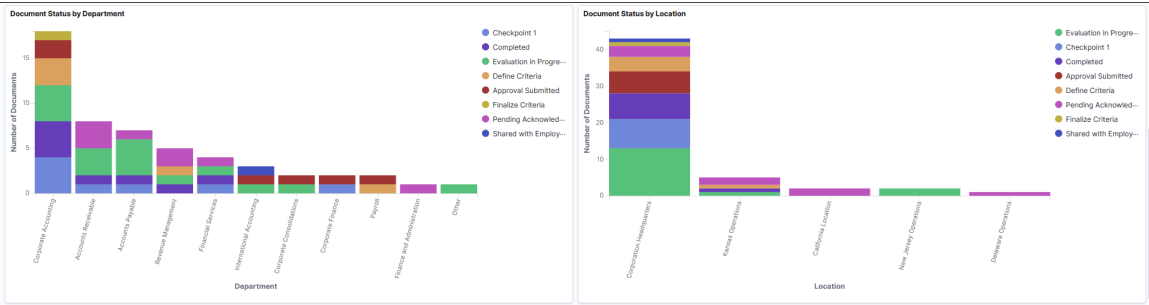
This example illustrates the Team Document Insights dashboard (1 of 5).



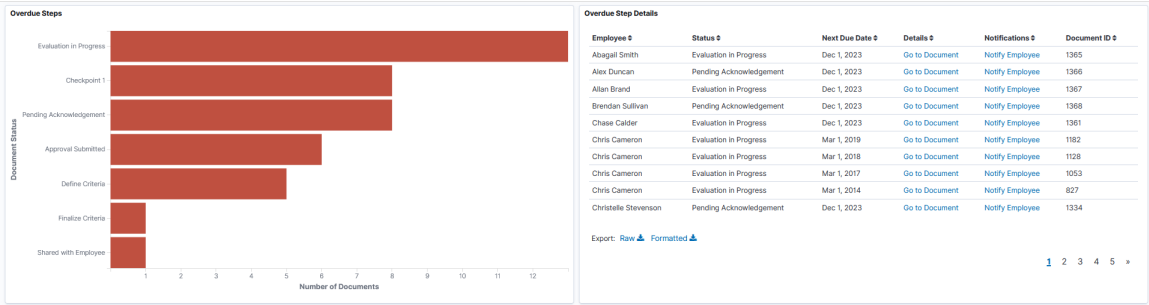
This example illustrates the Team Document Insights dashboard (2 of 5).

In-Progress Document Details									
Employee #	Job Title #	Reports To #	Owner #	Type #	Status #	Period Begin Date #	Period End Date #	Next Due Date #	Details #
Abigail Smith	Billing Specialist	John Patterson	John Patterson	Annual Review	Evaluation in Progress	Jan 1, 2023	Dec 31, 2023	Dec 1, 2023	Go to Document
Alex Duncan	Accountant	John Patterson	John Patterson	Annual Review	Pending Acknowledgement	Jan 1, 2023	Dec 31, 2023	Dec 1, 2023	Go to Document
Allan Brand	Analyst-HR/Payroll	John Patterson	John Patterson	Annual Review	Evaluation in Progress	Jan 1, 2023	Dec 31, 2023	Dec 1, 2023	Go to Document
Brendan Sullivan	Financial Analyst	John Patterson	John Patterson	Annual Review	Pending Acknowledgement	Jan 1, 2023	Dec 31, 2023	Dec 1, 2023	Go to Document
Chase Calder	General Ledger Specialist	Christelle Stevenson	Christelle Stevenson	Annual Review	Evaluation in Progress	Jan 1, 2023	Dec 31, 2023	Dec 1, 2023	Go to Document
Chris Cameron	Finance Specialist	Edmund Donahue	Edmund Donahue	Annual Review	Evaluation in Progress	Jan 1, 2018	Dec 31, 2018	Mar 1, 2019	Go to Document
Chris Cameron	Finance Specialist	Edmund Donahue	Edmund Donahue	Annual Review	Evaluation in Progress	Jan 1, 2017	Dec 31, 2017	Mar 1, 2018	Go to Document
Chris Cameron	Finance Specialist	Edmund Donahue	Edmund Donahue	Annual Review	Evaluation in Progress	Jan 1, 2016	Dec 31, 2016	Mar 1, 2017	Go to Document
Chris Cameron	Finance Specialist	Edmund Donahue	Edmund Donahue	Annual Review	Evaluation in Progress	Jan 1, 2013	Dec 31, 2013	Mar 1, 2014	Go to Document
Christelle Stevenson	Manager-Accounting	Rosanna Channing	Rosanna Channing	Annual Review	Pending Acknowledgement	Jan 1, 2023	Dec 31, 2023	Dec 1, 2023	Go to Document

This example illustrates the Team Document Insights dashboard (3 of 5).



This example illustrates the Team Document Insights dashboard (4 of 5).



This example illustrates the Team Document Insights dashboard (5 of 5).

Completed Document Details										
Employee ID	Job Title	Reports To	Owner	Type	Status	Period Begin Date	Period End Date	Review Rating	Details	Document ID
Christelle Stevenson	Manager-Accounting	Rosanna Channing	Rosanna Channing	Annual Review	Completed	Jan 1, 2022	Dec 31, 2022	Exceeds Expectations	Go to Document	1320
Daryl Reese	Financial Analyst	Rosanna Channing	Rosanna Channing	Annual Review	Completed	Jan 1, 2022	Dec 31, 2022	Meets Expectations	Go to Document	1325
David Ho	Senior Financial Analyst	Rosanna Channing	Rosanna Channing	Annual Review	Completed	Jan 1, 2022	Dec 31, 2022	Needs Improvement	Go to Document	1327
Edmund Donahue	Manager-Accounting	Rosanna Channing	Rosanna Channing	Annual Review	Completed	Jan 1, 2022	Dec 31, 2022	Meets Expectations	Go to Document	1326
John Patterson	Manager-Revenue	Rosanna Channing	Rosanna Channing	Annual Review	Completed	Jan 1, 2022	Dec 31, 2022	Meets Expectations	Go to Document	1324
Mel Lee	Accountant	Rosanna Channing	Rosanna Channing	Annual Review	Completed	Jan 1, 2022	Dec 31, 2022	Exceeds Expectations	Go to Document	1323
Sharon Quilligan	Financial Analyst	Rosanna Channing	Rosanna Channing	Annual Review	Completed	Jan 1, 2022	Dec 31, 2022	Needs Improvement	Go to Document	1321
Victoria Zinn	Accountant	Rosanna Channing	Rosanna Channing	Annual Review	Completed	Jan 1, 2022	Dec 31, 2022	Exceeds Expectations	Go to Document	1322

Note: When you select filters or chart items, or modify the date range, the system dynamically updates all visualizations on the dashboard.

Document Controls

<i>Field or Control</i>	<i>Description</i>
Organization For, Document Owner, Usage, Type, Template, Rating Model, Job Title, Business Unit, Department, and Location	Select to refine document data by one or more delivered filters. Organization For: When a manager is selected, the system displays documents for all employees reporting both directly and indirectly to the selected manager. Document Owner: When a manager is selected, the system displays documents in which the selected manager is listed as the manager (owner). Usage, Type, and Template fields work together. To filter by type, select a usage first. To filter by template, select a usage first and then a type. Rating Model: Filter the documents that are displayed in the dashboard by specified rating models. Job Title: Filter the documents that are displayed in the dashboard by specified employee job titles. Business Unit: Filter the documents that are displayed in the dashboard by specified business units. Department: Filter the documents that are displayed in the dashboard by specified departments. Location: Filter the documents that are displayed in the dashboard by specified locations.

Team Document Insights Visualizations

The Team Document Insights dashboard provides you with the following collection of interactive visualizations as a manager to monitor the progress of your team's documents and identify the documents with steps that employees did not complete by due date.

<i>Visualization</i>	<i>Description</i>
Documents by Review Status pie chart	This visualization displays the percentage distribution of current and completed documents by document status.
Documents by Review Rating donut chart	This visualization displays the percentage distribution of current and completed documents by review rating.

Visualization	Description
Document status metrics	These panels display number counts of current documents by document status. These numbers provide a quick update of where employees are with their performance reviews, and help identify potential issues or bottlenecks in the review cycle.
Document Status by Department vertical bar chart	This visualization displays the distribution of current and completed documents by document status and department. Pause over a bar item to view the number count.
Document Status by Location vertical bar chart	This visualization displays the distribution of current and completed documents by document status and location. Pause over a bar item to view the number count.
Overdue Steps horizontal bar chart	This visualization displays the distribution of current documents with missed steps by status.
Overdue Step Details grid	This grid lists the information of the documents that have missed steps. From the grid, you can view the missed due dates, navigate to the documents directly, and send reminders to the employees about the overdue steps.

In-Progress Document Details and Completed Document Details Grids

The **In-Progress Document Details** grid lists the information of employees' current documents that are presented in the visualizations of the dashboard.

The **Completed Document Details** grid lists the information of employees' completed documents for the specified time period.

Field or Control	Description
 (Sort column heading) icon	Click a column heading to sort grid rows by the column value in ascending or descending order.

Field or Control	Description
 (Filter for value) and  (Filter out value) icons	These filter icons appear when you pause next to a field value. These icons are available for all column values in the grid, and provide a quick way to add filters to the dashboard. Click the Filter for value (+ magnify glass) icon to add the shown field value as a filter. For example, if you click to filter for a Department value, all visualizations will refresh to show employee documents for that department. Click the Filter out value (- magnify glass) icon to remove the shown field value from the filtering process. For example, if you click to filter out the <i>Human Resources</i> value in the Department column, visualizations will refresh to show information for all departments except <i>Human Resources</i>. Filters can be removed from the Filters area at the top of the page.
Go to Document	Click to access the corresponding document in a new browser window or tab. (Manager) The manager view of the document appears when you access it from the manager dashboard. The system uses the Direct Reports functionality to determine if you have access to the documents. Note: If you update the document, you need to rebuild the index for the changes to be reflected in these visualizations. When RTI is enabled, changes from the document will be updated in the indexes automatically in real time. See the Real Time Indexes for Performance Insights Visualizations section in this topic for the list of indexes that are RTI-enabled for the document and performance insights dashboards.
Export links: • Raw • Formatted	Click to export data from the grid into a .csv file format.

Related Links

[\(Fluid\) Working With ePerformance Documents](#)

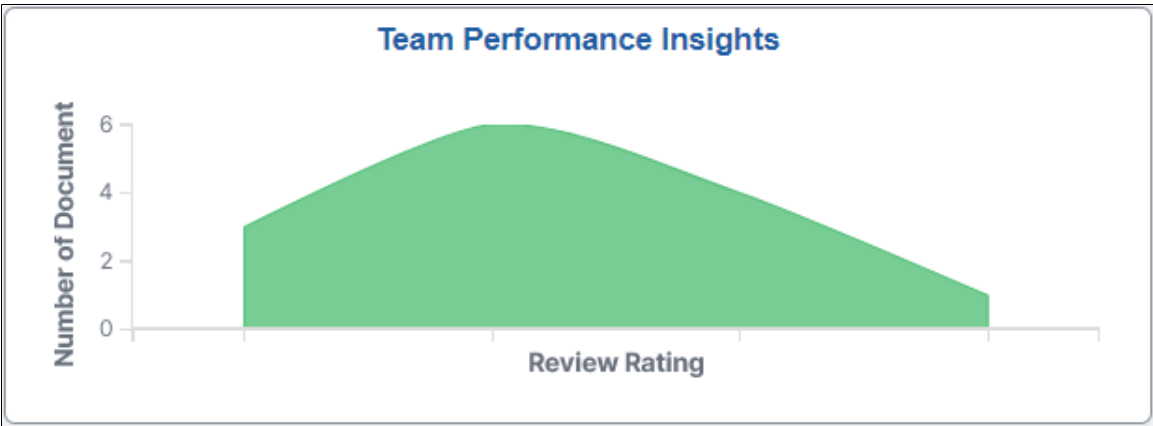
Team Performance Insights Tile

Managers use the Team Performance Insights tile to access the Team Performance Insights dashboard.

Navigation:

The Team Performance Insights tile is located on the [Team Performance Dashboard](#).

This example illustrates the Team Performance Insights tile.



The Team Performance Insights tile displays the **Employee Performance** visualization, which gives a snapshot of employees' performance ratings for the team based on their completed documents included in the default time period.

Click this tile to access the [Team Performance Insights Dashboard](#) and gain insight into the performance of the manager's direct and indirect reports.

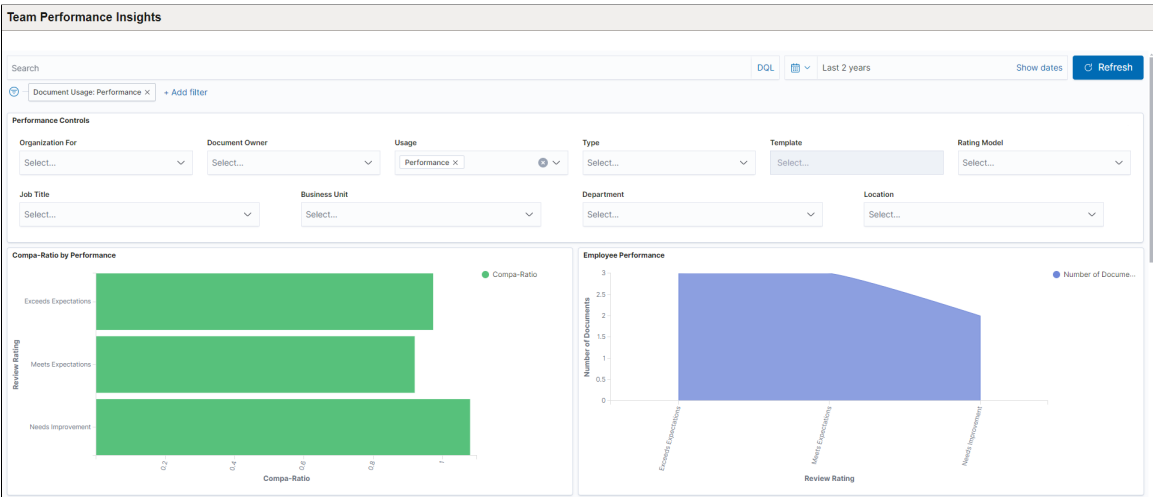
Team Performance Insights Dashboard

Managers use the Team Performance Insights dashboard to review and analyze the performance of employees on their teams.

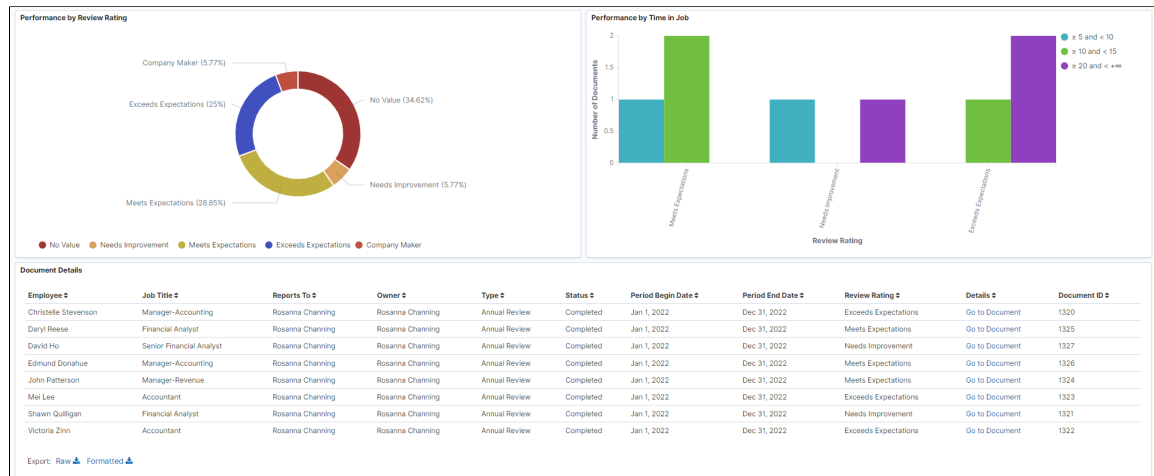
Navigation:

Click the **Team Performance Insights** tile.

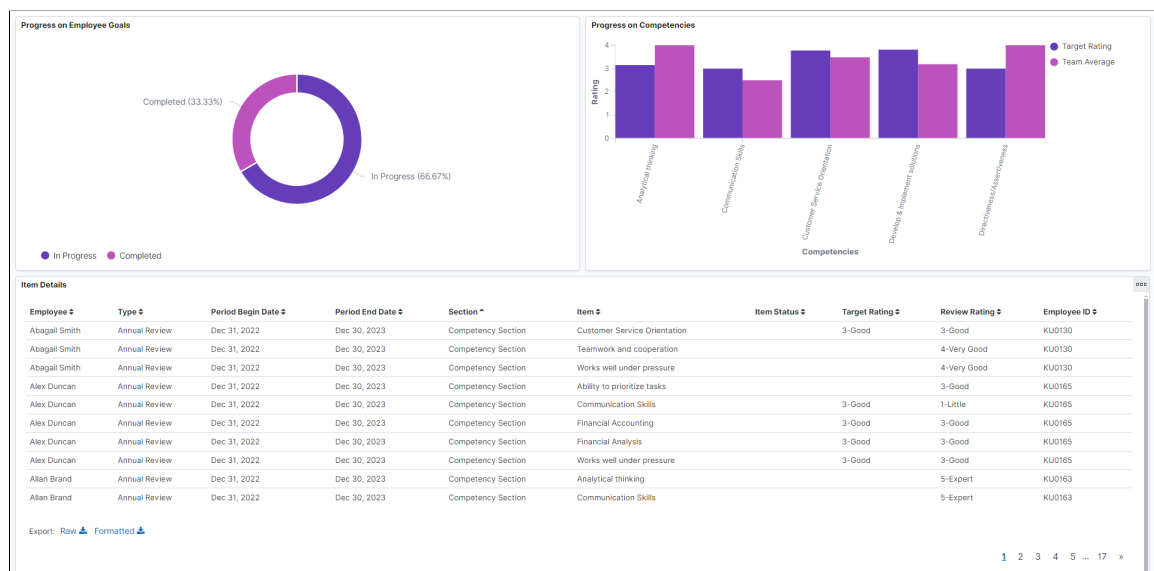
This example illustrates the Team Performance Insights dashboard (1 of 3).



This example illustrates the Team Performance Insights dashboard (2 of 3).



This example illustrates the Team Performance Insights dashboard (3 of 3).



When you select filters or chart items, or modify the date range, the system dynamically updates all visualizations on the dashboard.

Performance Controls

<i>Field or Control</i>	<i>Description</i>
Organization For, Document Owner, Usage, Type, Template, Rating Model, Job Title, Business Unit, Department, and Location	Select to refine the team rating data to display using one or more delivered filters. Organization For: When a manager is selected, the system displays documents for all employees reporting both directly and indirectly to the selected manager. Document Owner: When a manager is selected, the system displays documents in which the selected manager is listed as the manager (owner). Usage, Type, and Template fields work together. To filter by type, select a usage first. To filter by template, select a usage first and then a type. Rating Model: Filter the documents that are displayed in the dashboard by specified rating models. Job Title: Filter the documents that are displayed in the dashboard by specified employee job titles. Business Unit: Filter the documents that are displayed in the dashboard by specified business units. Department: Filter the documents that are displayed in the dashboard by specified departments. Location: Filter the documents that are displayed in the dashboard by specified locations.

Team Performance Insights Visualizations

The Team Performance Insights dashboard provides you with the following collection of interactive visualizations as a manager to review and analyze employees' performance of your team, and monitor the progress of their goals and competencies.

Note: The **Team Performance Insights** dashboard includes visualizations that display data for current and completed documents (with the *Performance* usage) respectively.

<i>Visualization</i>	<i>Description</i>
Compa-Ratio by Performance horizontal bar chart	This visualization displays compa-ratio values by review rating. Use this visualization to gain insight into the performance of employees in relation to their compensation for that document cycle.

Visualization	Description
Employee Performance area chart	This visualization displays the distribution of employees' completed documents by review rating. Pause over the curve line to view the number count.
Performance by Review Rating donut chart	This visualization displays the percentage distribution of documents by review rating.
Performance by Time in Job vertical bar chart	This visualization displays the performance ratings of the employees and the number of years that they have been in their positions for that document cycle. Use this visualization to see how the performance of employees is relative to the time they serve in their positions.
Progress on Employee Goals donut chart	This visualization displays the percentage completion of employees' goals by item status. Use this visualization to monitor the employees' progress on goals from current documents. Note: As delivered, information in this visualization comes from the Status field of the items in the <i>Goals and Objectives</i> section (GOALs), which uses <i>Business Objectives</i> special processing. The display of this field is configurable in the template definition.
Progress on Competencies vertical bar chart	This visualization displays the average and target ratings of competencies (maximum of 5) for the team. The average team rating of a competency is calculated from the manager evaluation ratings of that competency in team's current documents. Use this visualization to compare average competency ratings to their average target values and understand if the team is performing at, or near the set targets.

Document Details and Item Details Grids

The **Document Details** grid lists the information of employees' documents that are presented in the visualizations of the dashboard.

The **Item Details** grid lists the information of items that are available in the indexes, which includes items in documents that are in progress where *either* at least one checkpoint step (if applicable) is complete *or* the manager evaluation is complete. Interact with goal and competency data using the visualizations delivered for employee goals and competencies.

Field or Control	Description
 (Sort column heading) icon	Click a column heading to sort grid rows by the column value in ascending or descending order.
 (Filter for value) and  (Filter out value) icons	These filter icons appear when you pause next to a field value. These icons are available for all column values in the grid, and provide a quick way to add filters to the dashboard. Click the Filter for value (+ magnify glass) icon to add the shown field value as a filter. For example, if you click to filter for a Department value, all visualizations will refresh to show employee documents for that department. Click the Filter out value (- magnify glass) icon to remove the shown field value from the filtering process. For example, if you click to filter out the <i>Human Resources</i> value in the Department column, visualizations will refresh to show information for all departments except <i>Human Resources</i>. Filters can be removed from the Filters area at the top of the page.
Go to Document	Click to access the corresponding document in a new browser window or tab. (Manager) The manager view of the document appears when you access it from the manager dashboard. The system uses the Direct Reports functionality to determine if you have access to the documents. Note: If you update the document, you need to rebuild the index for the changes to be reflected in these visualizations. When RTI is enabled, changes from the document will be updated in the indexes automatically in real time. See the Real Time Indexes for Performance Insights Visualizations section in this topic for the list of indexes that are RTI-enabled for the document and performance insights dashboards.
Export links: • Raw • Formatted	Click to export data from the grid into a .csv file format.

Related Links

[\(Fluid\) Working With ePerformance Documents](#)

Working With Rating Distribution and Calibration

Understanding Rating Distribution and Calibration

The Rating Distribution and Calibration feature in Fluid provides an insights dashboard that enables high-level managers (for example, directors and vice presidents) to evaluate and calibrate their teams with the organization's desired rating distribution in Manager Self-Service.

During the performance review cycle, high-level managers can use the [Team Rating Insights Dashboard](#) to:

- View the preliminary rating distribution of their teams overall and compare it against the desired rating distribution of the organization.

This allows high-level managers to get an idea of what the team managers expect their team performance will be, and how well it aligns with the organization's expectation at the beginning of the review cycle.

- Evaluate the review rating distribution of their teams (overall and individually) and calibrate their teams as a whole to align with the desired rating distribution of the organization.

During the evaluation phase, team managers conduct reviews with employees and enter the proposed review rating for each of them. Before the proposed review rating is finalized and shared with the employee, high-level managers can use the dashboard to compare the review rating distribution of their teams against the desired rating distribution of the organization, and notify team managers to update employee review ratings as needed to ensure that both curves are aligned. From the dashboard, they can check out the review rating distribution for the team as a whole or by manager, confirm if all review ratings have been entered, and see how well the review rating distribution (actual) matches up to the preliminary rating distribution (expected).

Note: The Rating Distribution and Calibration feature supports documents with the *Performance* document usage only.

Administrators have the ability to view and compare preliminary, actual (not editable), and desired rating distributions for employee groups in Classic. For more information, see [Viewing Ratings Summaries](#).

Related Links

[Setting Up Rating Distribution and Calibration](#)

[Viewing Team Rating Insights](#)

Setting Up Rating Distribution and Calibration

This topic discusses how to set up the feature for managers to evaluate and calibrate team performance.

Pages Used to Set Up Rating Distribution and Calibration

<i>Page Name</i>	<i>Definition Name</i>	<i>Usage</i>
Set Up Mgr Rating Distribution Page	EP_DIST_MGR	Define the parameters for generating the Team Rating Insights.
Assign Document Defaults Page	EP_DEFAULT	Enter the default document type and evaluation period values for Team Rating Insights.

Setting Up Rating Distribution and Calibration

Here are the high-level steps for setting up the Rating Distribution and Calibration feature (the [Team Rating Insights Dashboard](#)) for high-level managers.

Note: To perform setup tasks that are specific to the ePerformance application (steps 1-3), the administrator needs to be a member of the *ePerformance HR Admin* role.

1. Define rating distribution parameters for managers on the [Set Up Mgr Rating Distribution Page](#).
2. Specify default values for the *Team Rating Insights* transaction on the [Assign Document Defaults Page](#).

The system uses the specified document type and performance review period to launch the initial view of the Team Rating Insights tile and dashboard.

3. (Optional) Enable preliminary ratings to be assigned to performance documents by selecting the **Preliminary Rating** check box in the **Overall Summary** section of template definitions for documents.

See [Template Definition - Structure Page](#).

Important! Though not required, the use of preliminary ratings in performance documents is highly recommended to take full advantage of the Team Rating Insights dashboard in Manager Self-Service. Managers enter preliminary ratings of their team documents on the [Enter Preliminary Ratings Page](#).

4. Perform setup steps for the Team Rating Insights dashboard.

For more information, refer to [Understanding How to Set Up Team Rating Insights Dashboard](#). This topic also includes user role information.

Related Links

[Understanding Rating Distribution and Calibration](#)

Set Up Mgr Rating Distribution Page

Use the Set Up Mgr Rating Distribution page (set up manager rating distribution page) (EP_DIST_MGR) to define the parameters for generating Team Rating Insights.

Navigation:

Workforce Development > Performance Management > Reports > Set Up Mgr Rating Distribution > Set Up Mgr Rating Distribution

This example illustrates the fields and controls on the Set Up Mgr Rating Distribution page (1 of 2).

Set Up Mgr Rating Distribution

Document TypePERFORMPerformance Document

Rating Distribution

*Effective Date06/18/2024

StatusActive

*Description

Short Description

☐ Apply to All Templates

Define Templates

*Template ID

Description

This example illustrates the fields and controls on the Set Up Mgr Rating Distribution page (2 of 2).

Review Rating Model

*Rating Model

*Calculation Method

Total Percent0.00

Desired Rating Distribution

Review Rating

Desired Distribution0.00%

The administrator (user with the *ePerformance HR Admin* role) uses this page to define a default desired rating distribution by document type for managers to apply against documents that are owned by them or managers in their teams.

Field or Control	Description
Document Type	Displays the document type to which rating distribution setup applies. Only document types with the Performance document usage are available for selection.
Apply to All Templates	Select to apply the rating distribution setup to all templates of the displayed document type. Clear this option to apply the setup to templates specified in the Define Templates section only.

Define Templates

Specify one or more active templates of the displayed document type to be used for rating distribution and to which the rating distribution setup applies. This section appears when the **Apply to All Templates** field is cleared.

Review Rating Model

A document type can be configured to support the rating distribution for one or more rating model and calculation method combinations.

Field or Control	Description
Rating Model	Select the rating model for the desired distribution.
Calculation Method	Select the calculation method for the desired distribution. Options are <i>Average</i> , <i>Review Band</i> , and <i>Summation</i> .
Total Percent	Displays the sum of desired percentages that are entered.

Desired Rating Distribution

Specify the desired rating distribution for each rating model and calculation method combination. The desired rating distribution defines the desired percentage of documents that should fall into each rating category. The selected rating model and calculation method determine which fields appear in this section.

Field or Control	Description
Review Rating	Displays the document's qualitative ratings from the rating model table. The description of the rating from the Rating Model table is also displayed.

Field or Control	Description
Desired Distribution	Enter the percentage of employees that should receive the rating that is specified in the Review Rating field. Distribution percentages must add up to 100.

Viewing Team Rating Insights

PeopleSoft Team Rating Insights dashboard provides high-level managers the ability to view and analyze team performance rating data using PeopleSoft Insights visualizations.

Based on user privileges, high-level managers can access the visualizations delivered on the Team Rating Insights dashboard to compare preliminary rating and review rating distributions of their teams against the desired rating distribution of the organization and calibrate their teams accordingly.

The Team Rating Insights dashboard is built on the PeopleSoft Insights platform, which relies on an underlying analytics engine and search engine. Team rating data that is visible on the dashboard comes from the *HC_EP_PERF_RATINGS_MGR* search index.

This topic provides an overview of how to set up the dashboard for team rating insights, lists common elements and controls, and discusses the PeopleSoft Team Rating Insights dashboard.

Understanding PeopleSoft Insights

PeopleSoft Insights is an analytical engine that provides visual reports (visualizations) in the form of charts, tables, graphs and so on. The visualizations are based on queries that retrieve data from the PeopleSoft Search Framework.

These videos provide an overview of the PeopleSoft Insights feature:

Video: [Insights with PeopleSoft](#)

Video: [PeopleSoft HCM Insights](#)

Video: [Image Highlights, PeopleSoft HCM Update Image 50: Performance Review Ratings Calibration](#)

For information on Insights dashboards, see:

- “Understanding PeopleSoft Insights” (Application Fundamentals)
- *PeopleTools Search Technology*: “Monitoring PeopleSoft Search Framework and OpenSearch” and “Working with Insights Dashboards for PeopleSoft Application Data” documentation.

Pages Used to View Team Rating Insights

Page Name	Definition Name	Usage
Team Rating Insights Tile	HC_EP_TEAM_RATINGS_FL (this is the cref for the tile)	Access analytics on the Team Rating Insights dashboard as a high-level manager.
Team Rating Insights Dashboard	HC_EP_TEAM_RATINGS_FL	Compare and analyze team performance rating data for employees in the organization.

Understanding How to Set Up Team Rating Insights Dashboard

Before high-level managers can access the visualizations for team rating data, the following steps should be performed:

1. Deploy the *HC_EP_PERF_RATINGS_MGR* (Performance Analytics Manager Ratings) index:

(PeopleTools > Search Framework > Search Admin Activity
Guide > Administration > Deploy/Delete Object)

2. Build the *HC_EP_PERF_RATINGS_MGR* search index:

(PeopleTools > Search Framework > Search Admin Activity
Guide > Administration > Schedule Search Index)

3. Deploy *Team Rating Insights Tile* and *Team Rating Insights*:

(PeopleTools > Search Framework > Administration > Deploy Insights Dashboards)

Note: The full index must be run before the dashboard can be deployed.

4. Assign the *ePerformance MGR Team Ratings* role to users to access the Team Rating Insights dashboard.

Be sure to review and perform the steps listed in the [Setting Up Rating Distribution and Calibration](#) topic to complete the setup of the Rating Distribution and Rating feature (the Team Rating Insights dashboard).

Real Time Index for Team Rating Visualizations

The Team Rating search index supports real time indexing (RTI) with a minimum PeopleTools version. When enabled, RTI allows real-time updates to the indexed data to provide a search using the latest information.

Search Definition	Minimum PeopleTools Release	Usage
Performance Analytics Manager Ratings HC_EP_PERF_RATINGS_MGR	8.60.11	Allows high-level managers to view team rating information for their employees.

For more information about Real Time Indexing, refer to *PeopleTools: Search Technology*, “Administering Real Time Indexing.”

Related Links

- “Understanding PeopleSoft Insights Using PeopleSoft Search Framework” (Application Fundamentals)
- “Understanding Real Time Indexing in HCM” (Application Fundamentals)

Common Elements and Controls

This section lists the common elements and controls that are used in Insights analytics.

For more information on working with PeopleSoft Insights and filters, see *PeopleTools: Search Technology*, “Working with Insights Dashboards for PeopleSoft Application Data” documentation.

Search and Filter Options:

Note: Filtering options apply to all visualizations, which allows users to drill down on all the charts at once.

<i>Field of Control</i>	<i>Definition</i>
Search field	Enter a query to filter data, if applicable.

Field of Control	Definition
 (Change all filters) and + Add filter icon and link	Enter criteria to filter data on the visualizations. You can apply filters in a number of ways: • Enter queries in the Search field. • Use the + Add filter link to create filters using fields, operators and field values. • Use delivered filter fields. • Select a chart item from a visualization. • Use the filter options in the Rating Details grid to add or exclude items. • Use the legend to add or exclude items. Added filters are displayed next to the + Add filter link for reference. For example, when you click a donut chart item, such as <i>Exceeds Expectations</i> in the Review Ratings by Percent chart, the filter is automatically added to your filters list, and all visualizations are refreshed to show data for employee documents with the <i>Exceeds Expectations</i> review rating. Select the Change all filters icon for a list of actions that can be performed on <i>all</i> filters, for example, disable them temporarily, remove them permanently, or invert inclusion (show data that does not meet filter criteria). Click a filter item for a list of similar actions that can be performed on it individually.

Visualization Options:

When you pause over a visualization, the **Options** and **Legend** icons (if applicable) are displayed on the top right and bottom left corners respectively. Use them to inspect the chart or table and view the details of that visualization and toggle the legend display.

Field or Control	Definition
 (Options) icon	Click the Options icon to select one of these options: • <i>Inspect</i>: Select this option to have a slide out page appear providing the details in a grid format. You can also download data from this page. • <i>Maximize panel</i> or <i>Minimize</i>: Select <i>Maximize panel</i> to have the page display this visualization in full screen. Select <i>Minimize</i> to return to the dashboard and display all visualizations.
 (Toggle legend) icon	Click this icon to hide or display the legend for the chart, if available. You can click an item in the legend to change its color, or add it as a filter (if applicable).
Chart item (bar, pie slice, and so forth)	Pause over a chart item, such as a bar item or pie slice, to view a summary of details for that item. Select a chart item to add a filter for it to apply to all visualizations.

Considerations for Using Team Rating Insights

Review these points before you begin using the Team Rating Insights dashboard:

- To make the analysis of rating data more focused and meaningful, Oracle recommends that you always filter the data that you work with on the dashboard, for example:
 - Specify a document type and date (or date period).

The system uses the values specified for the *Team Rating Insights* transaction on the [Assign Document Defaults Page](#) as default filter values to populate visualizations for the tile and dashboard.

Note: If a date or date period is not specified on the document defaults page, the dashboard adds a period filter (past two years from the current date) as the default.

As delivered, the search index for Team Rating Insights includes team rating data for the last 5 years.

Update the filter values in the **Rating Controls** section at any time to change the set of data you visualize on the dashboard as needed.

- Specify a rating model to use as filter, if the selected document type has more than one rating model setup on the [Set Up Mgr Rating Distribution Page](#).

- Enable real-time indexing for the *HC_EP_PERF_RATINGS_MGR* index to view the latest data on the dashboard.
- To take full advantage of the Team Rating Insights capability, which enables you to view and compare the preliminary ratings and actual review ratings of documents against the defined desired ratings, the use of preliminary ratings is recommended (though not required).

Note: Visualizations for preliminary ratings do not show any results if preliminary rating is not used.

- In this document, the term *review rating* refers to the rating that is entered in the **Overall Summary** section of a performance document. This rating can be updated as needed based on the dashboard analysis, as long as the document is still in the evaluation phase. It can no longer be changed once the document moves past the *Evaluation in Progress* status (for example, after the document is shared with the employee).
- Documents of all statuses except *Canceled* are included in the Team Rating Insights.
- Delegated documents are not supported. If you have delegated documents, they are not available for you to visualize on the Team Rating Insights unless they have been transferred to you as the document manager or owner permanently.

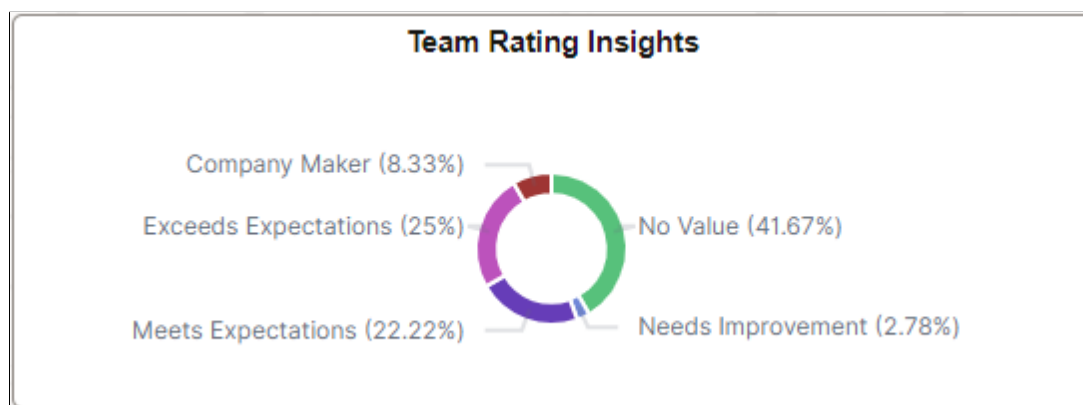
Team Rating Insights Tile

High-level managers use the Team Rating Insights tile to access analytics on the Team Rating Insights dashboard.

Navigation:

The Team Rating Insights tile is located on the [Team Performance Dashboard](#).

This example illustrates the Team Rating Insights tile.



This tile displays the **Review Ratings by Percent** visualization, which shows the percentage distribution of documents in the logged-in manager's organization by review rating.

Select this tile to access the [Team Rating Insights Dashboard](#) and interact with the performance rating data in your organization as a high-level manager.

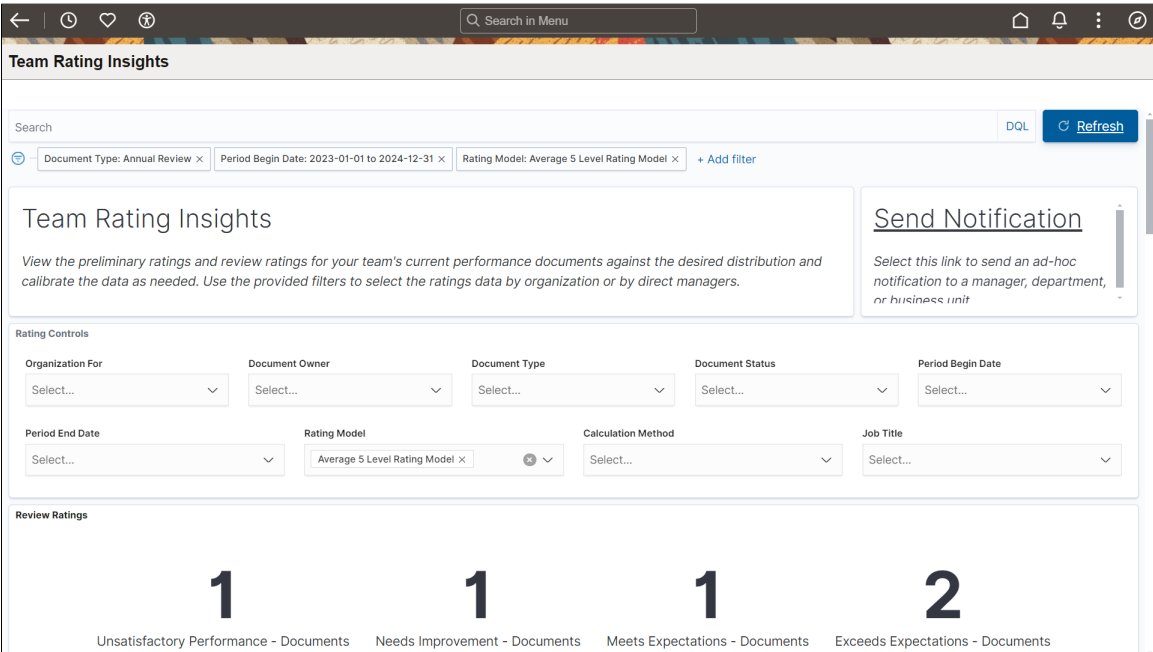
Team Rating Insights Dashboard

High-level managers use the Team Rating Insights dashboard to compare and analyze team performance rating data for employees in the organization.

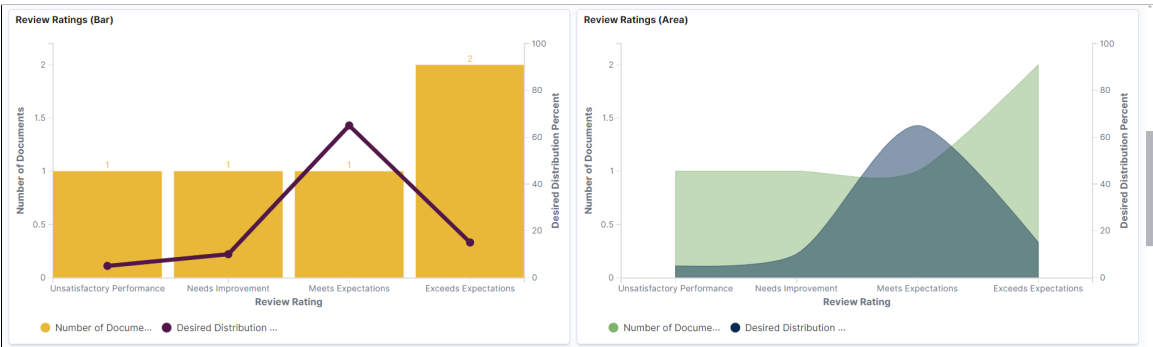
Navigation:

Select the **Team Rating Insights** tile.

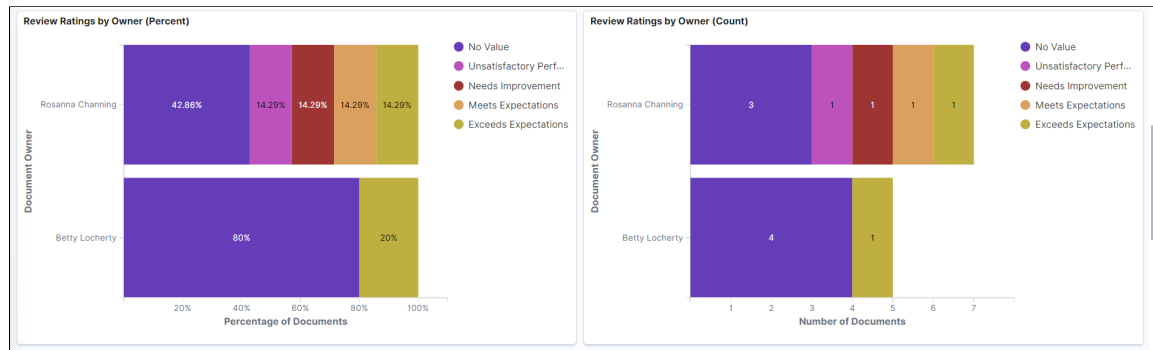
This example illustrates the Team Rating Insights dashboard (1 of 5).



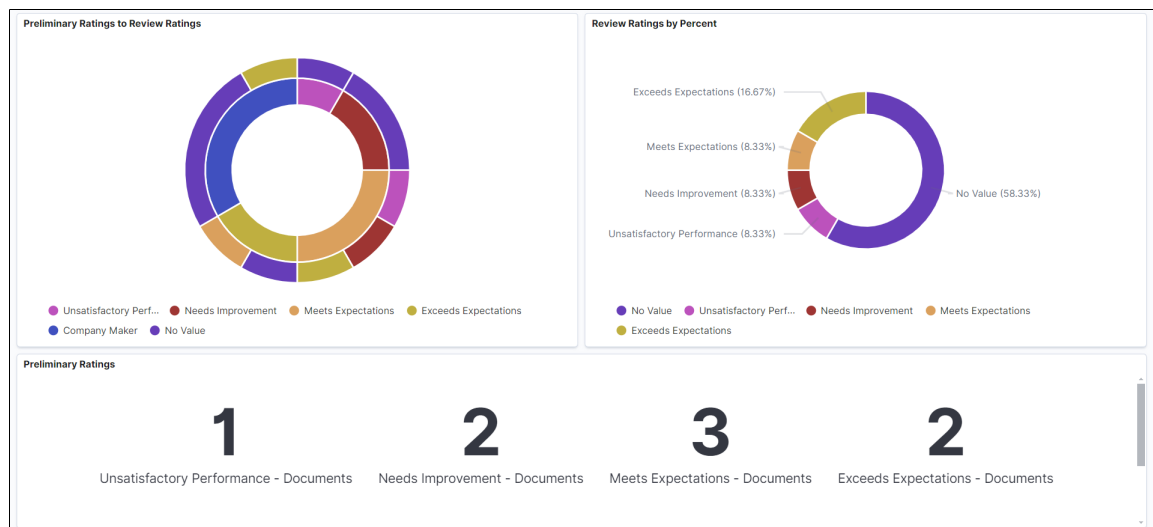
This example illustrates the Team Rating Insights dashboard (2 of 5).



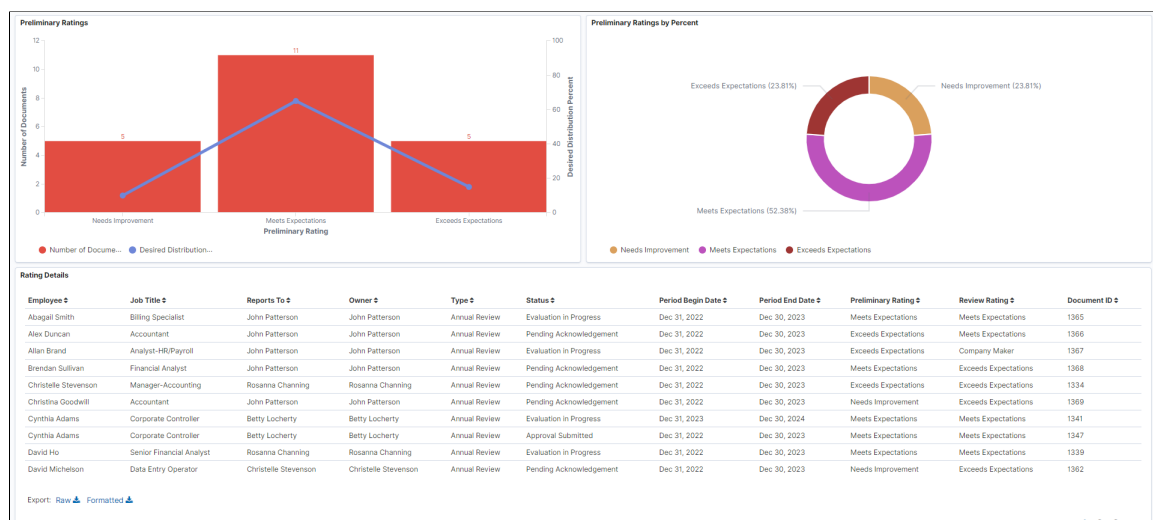
This example illustrates the Team Rating Insights dashboard (3 of 5).



This example illustrates the Team Rating Insights dashboard (4 of 5).



This example illustrates the Team Rating Insights dashboard (5 of 5).



Warning! PeopleSoft Insights dashboards may not render properly if you access them using unsupported platforms.

When you select filters or chart items, or modify the date range, PeopleSoft Insights dynamically updates all visualizations using the source from the index.

Team Rating Insights

View the description or instructional text provided for the Team Rating Insights.

Send Notification

Select the **Send Notification** link to send notifications (in-app, email, or both) to selected recipients on the “<Notification> Page (HCSC_NOTIF_ADH_FLU)” (Enterprise Components) on a new browser tab or window.

You can send notifications to alert team managers in situation such as:

- Review ratings for employees are not yet entered when the deadline is approaching.
- The current review rating distribution does not align with the organization's desired rating distribution, and certain rating adjustments need to be made.

Notifications can be sent to recipient types, such as employee (team managers in this case), department (list of recipients pertaining to specified departments as defined in the setup) and so on.

Rating Controls

For a list of filters available for the Team Rating Insights dashboard, see the [Common Elements and Controls](#) section in this documentation.

Field or Control	Description
Organization For, Document Owner, Document Type, Document Status, Period Begin Date, Period End Date, Rating Model, Calculation Method, and Job Title	Select to refine the team rating data to display using one or more delivered filters. Note: The dashboard includes values that are specified for the <i>Team Rating Insights</i> transaction on the Assign Document Defaults Page as default filter values to populate visualizations for the tile and dashboard. If a default period is not specified, it adds a period filter (past two years from the current date) as the default. Organization For: When a manager is selected, the system displays documents for all employees reporting both directly and indirectly to the selected manager. Document Owner: When a manager is selected, the system displays documents in which the selected manager is listed as the manager (owner). Document Type: (Recommended) Select a document type for the system to show team rating data for documents that match the specified type. Document Status: Select one or more document statuses used by the dashboard to filter the team rating data that is displayed. Period Begin Date and Period End Date: Enter the date values for the system to show team rating data for documents that match the specified time period. Note: To make the visualizations more meaningful for calibration, it is recommended that you specify a document type and date (or date period) to filter the information presented on the dashboard. System defaults can be defined on the Assign Document Defaults Page. Rating Model: Select a rating model used by the dashboard to filter the team rating data that is displayed. It is recommended if the selected document type has more than one rating model setup. Calculation Method: Select a calculation method used by the dashboard to filter the team rating data that is displayed. Job Title: Select one or more job titles used by the dashboard to filter team rating data that is displayed.

Team Rating Insights Visualizations

The Team Rating Insights dashboard provides you with the following collection of visualizations to compare and analyze team rating data as a high-level manager.

Note: The data displayed is based on the security defined for the search index. For example, a manager will only have access to their direct and indirect reports.

Important! For optimal performance, only the first 500 rows of data are displayed on the Insights dashboard. Use filters to refine the set of data you wish to visualize using the dashboard.

Visualization	Description
Review Ratings metrics	These number charts display performance document counts by review rating.
Review Ratings (Bar)	This visualization displays the number counts of performance documents by review rating, with a line overlay that shows the desired rating distribution percentage of the corresponding rating value. Use this visualization to compare the current review rating distribution in your organization against the desired rating distribution of the organization, which is defined on the Set Up Mgr Rating Distribution Page. Two Y-axes are displayed in this visualization: Number of Documents Y-axis for the bar chart, and Desired Distribution Percent Y-axis for the line.
Review Ratings (Area)	This visualization displays the number counts of performance documents by review rating and the desired rating distribution in an area chart. This visualization presents a different view of the data that is available in the Review Ratings (Bar) chart. Use this visualization to see how well the current review rating distribution aligns with the organization's desired rating distribution.

Visualization	Description
Review Ratings by Owner (Percent)	This visualization displays the percentage distribution of performance documents by review rating and by manager (who is the document owner). Use this visualization to track the progress of performance reviews by team. Notify document owners to update documents as needed, for example, if they are in danger of missing the deadline for entering their team ratings, or their review rating distribution does not align with the desired distribution of the organization.
Review Ratings by Owner (Count)	This visualization displays the number counts of performance documents by review rating and by manager (who is the document owner). It presents a different view of the same data that is available in the Review Ratings by Owner (Percent) chart.
Preliminary Ratings to Review Ratings donut chart	This visualization displays the preliminary rating and review rating values of performance documents in a donut chart. The inner ring represents preliminary ratings; the outer ring is the breakdown of review ratings by preliminary rating. Use this visualization to measure how well the preliminary ratings of documents that were specified at the beginning of the review cycle match the actual review ratings they are given at the end of the cycle. Both preliminary and review rating values match, if the color of the inner ring segment and its outer ring segment is the same. Hover over a segment in the outer ring to view details, such as the document count and percentage of the preliminary rating and the review rating.
Review Ratings by Percent donut chart	This visualization displays the percentage distribution of performance documents by review rating.
Preliminary Ratings metrics	These number charts display the counts of performance documents by preliminary rating.

Visualization	Description
Preliminary Ratings vertical bar chart	This visualization displays the number counts of performance documents by preliminary rating, with a line overlay that shows the desired rating distribution percentage of the corresponding rating value. Use this visualization to compare the initial ratings that team managers expected from their employees against the desired rating distribution of the organization, which is defined on the Set Up Mgr Rating Distribution Page. Two Y-axes are displayed in this visualization: Number of Documents Y-axis for the bar chart, and Desired Distribution Percent Y-axis for the line.
Preliminary Ratings by Percent donut chart	This visualization displays the percentage distribution of documents by preliminary rating.

Rating Details

This grid lists the rating and other related information for employees in your organization, which are presented in visualizations, in tabular format.

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.

Video: [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 step 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 a 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 they are ready to send a request to the employee, asking that the employee 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 they are 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 The Approval Before Employee Review (Apvl Before Review) Process - 3-Step, The Approval After Employee Review (Apvl After Review) Process - 3-Step, or The No Approval, With Employee Review (No Apvl with Review) Process - 2-Step process.
 - When the manager submits the document for approval, if the review process is The Approval After Employee Review (Apvl After Review) Process - 4-Step process.
 - When the manager manually completes the document, if the review process is either The Approval Before Employee Review (Apvl Before Review) Process - 5-Step or The No Approval, With Employee Review (No Apvl with Review) Process - 4-Step 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** section of the document, those comments are displayed as email content.

Note: Oracle PeopleSoft delivers Notification Composer Framework to manage the setup and administration of all notifications in one central location.

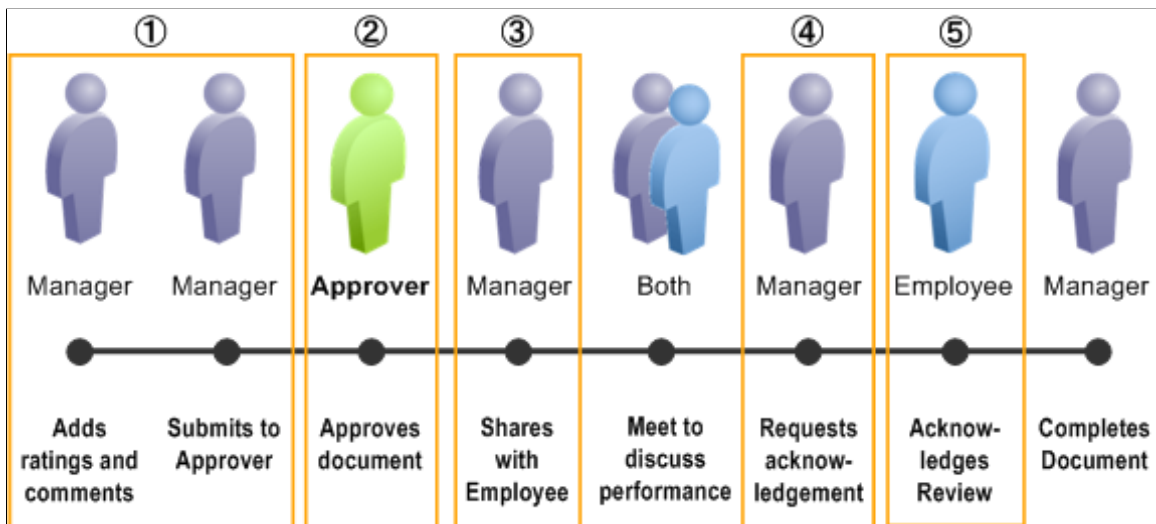
Once you have adopted the Notification Composer feature, you must use it to create new notifications and manage your existing notifications.

Notifications delivered with HCM Image 47 or later must use Notification Composer.

For more information about Notification Composer Framework, see “Understanding Notification Composer” (Enterprise Components).

The Approval Before Employee Review (Apvl Before 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:

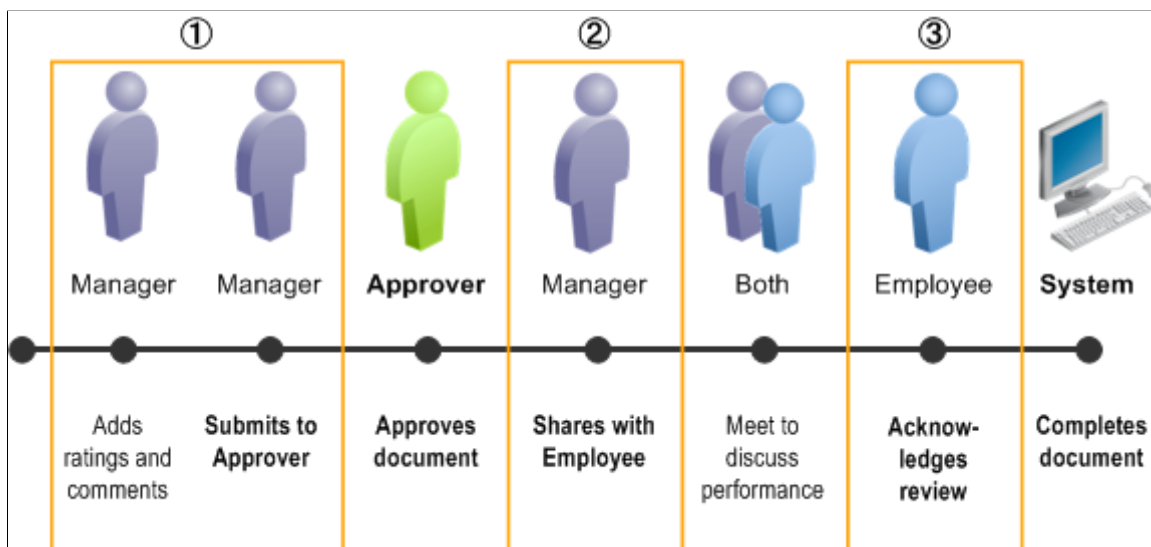
Action	Available Action Button	Document Status
1. Manager adds ratings and comments to the document. When finished, manager clicks the Submit for Approval button to submit the document for approval. Manager confirms the action.	Submit for Approval	(original) Evaluation in Progress (changed to) Approval - 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

Action	Available Action Button	Document Status
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 <i>Completed</i>. 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

This diagram illustrates the 3-step Approval Before Employee Review process flow:



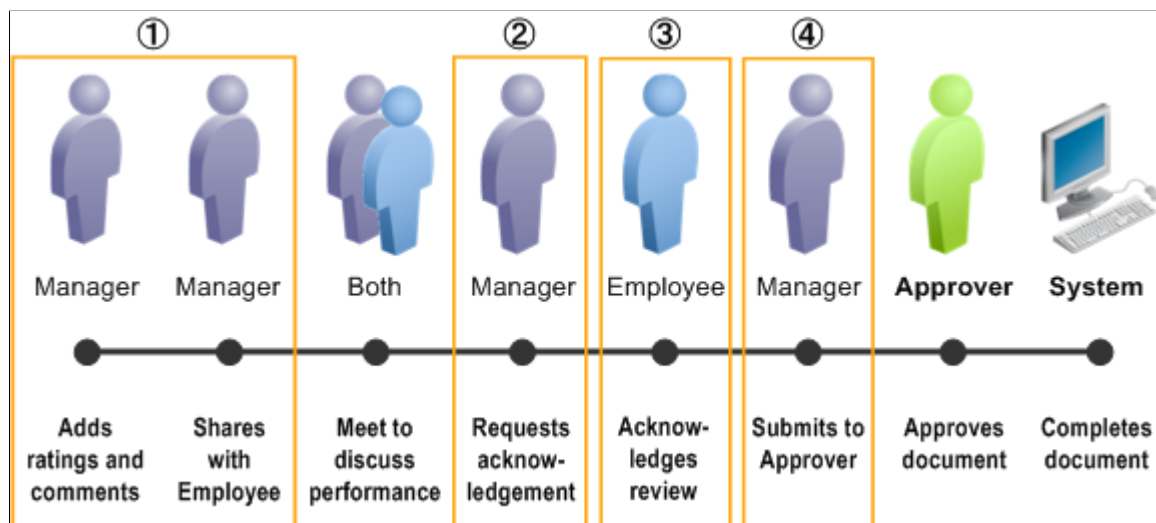
This table describes the flow of the process, lists the availability of action buttons that appear in the manager and employee evaluations for the process, and the change of statuses during the process:

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. <u>See Also Manager and Employee Signatures for the eSignature Section</u>	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 acknowledgement). 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 <i>Completed</i> .	-	(changed to) Completed

The Approval After Employee Review (Apvl After Review) Process - 4-Step

This diagram illustrates the 4-step Approval After Employee Review process flow:



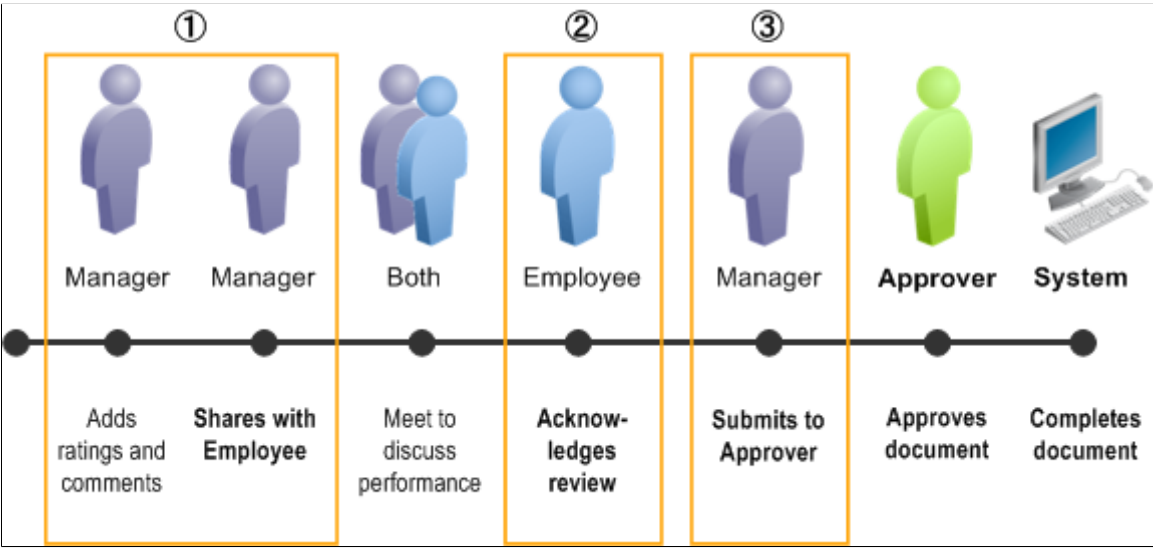
This table describes the flow of the process, lists the availability of action buttons that appear in the manager and employee evaluations for the process, and the change of statuses during the process:

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 <i>Acknowledged</i>. It also, 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 opens the document and clicks the Submit for Approval button. Manager confirms the action. System, if applicable, records the manager's eSignature. See Also Manager and Employee Signatures for the eSignature Section	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 <i>Completed</i>.	-	(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

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. <u>See Also Manager and Employee Signatures for the eSignature Section</u>	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 <i>Completed</i>.	-	(changed to) Completed

The Approval, No Employee Review (Apvl No Review) Process

This diagram illustrates the Approval, No Employee Review process flow:



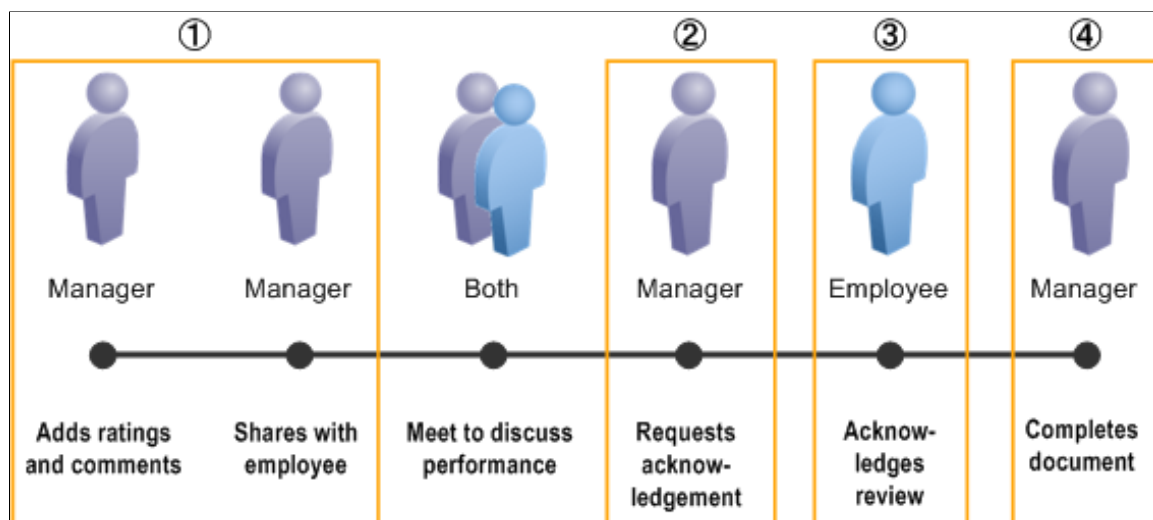
This table describes the flow of the process, lists the availability of action buttons that appear in the manager and employee evaluations for the process, and the change of statuses during the process.

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 <i>Approval - Approved</i> .	-	(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 <i>Completed</i> .	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

This diagram illustrates the 4-step No Approval, With Employee Review process flow:

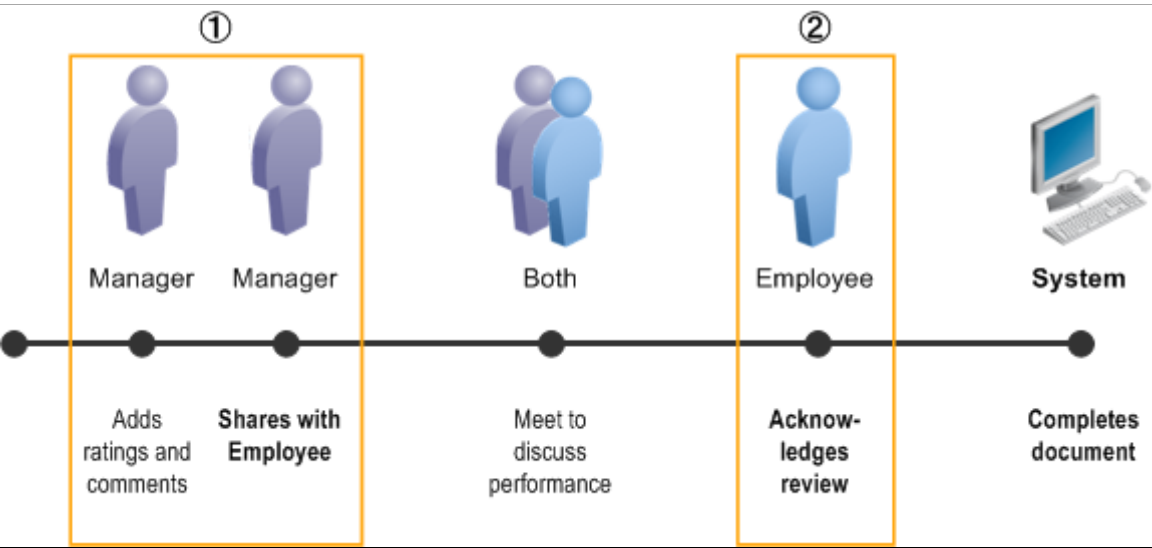


This table describes the flow of the process, lists the availability of action buttons that appear in the manager and employee evaluations for the process, and the change of statuses during the process.

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 <i>Completed</i>. 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

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 Manager and Employee Signatures for the eSignature Section	(for employee) Acknowledge (for manager) Override Acknowledgement	(changed to) Acknowledged
System sets the document status to <i>Completed</i> .	-	(changed to) Completed

The No Approval, No Employee Review (No Apvl No 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 <i>Completed</i> .	-	-

(Classic) Approving Documents

This section discusses how to:

- Select documents to approve.
- Approve documents.
- Resolve approval transactions in error.
- Delegate approvals.

Note: A fluid version of ePerformance is now available to support employee performance reviews. For more information, see [Understanding Fluid ePerformance](#).

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.
Approve Document Page	EP_APPRAISAL_EE	Approve or deny approval of a document.

Related Links

[\(Classic\) 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**

This example illustrates the fields and controls on the Select Transaction to Approve page.

Select Transaction to Approve

The following hyperlinks indicate employees which require your participation in an approval process. Select on a hyperlink to see details about what needs to be approved for each employee

▼ **Filter Criteria**

First Name

Last Name

Manager First Name

Last Name

Document Type

Period Between

31

-

31

Search

Clear

Performance Document [Personalize](#) | [Find](#) | | First 1 of 1 Last

Name	Begin Date	End Date	Document Status	Approval Status	Submitted By	Document Type
Mei Lee	01/01/2016	12/31/2016	Approval	Submitted	Rosanna Channing	Annual Review

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.

Note: You can also approve performance and development documents using the [Pending Approvals - Performance Page](#).

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.

This example illustrates the fields and controls on the Approve Document page (1 of 2).

Approve Document

Approve or deny the proposed information for the employee listed here. You may also enter optional comments about each approval choice. When you are finished, select the Approve or Deny button on the page.

Mei Lee

Empl ID KU0076

Actions ▼

Performance Document

Doc Type Annual Review

Author Rosanna Channing

Period Begin Date 01/01/2016

Period End Date 12/31/2016

Rating Meets Expectations

Performance Document Details

This example illustrates the fields and controls on the Approve Document page (2 of 2).

Evaluation Approval Chain

Review Employee: Pending

Evaluation Approval Chain

Pending

Multiple Approvers

ePerformance Approving Mgr

Comment

Approve

Deny

Go To

Approval Summary

Users can also approve or deny documents directly from email notifications that they receive for the approval requests.

See Also [Approving Documents From Email](#)

Field or Control	Description
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.

Field or Control	Description
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” (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

[Approving Documents Using Fluid Approvals](#)

Approving Documents Using Fluid Approvals

This topic describes how to approve documents using Fluid Approvals.

See Also “Using PeopleSoft Fluid User Interface Self-Service Approval Transactions” (Application Fundamentals)

Page Used to Approve Documents Using Fluid Approvals

Page Name	Definition Name	Usage
<u>Pending Approvals - Performance Page</u>	EOAWMA_TXNHDTL_FL	Approve a document.
<u>Manager Evaluation - Pending Approval Page</u>	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.

This example illustrates the fields and controls on the Pending Approvals - Performance page.

The screenshot displays the 'Performance' page in the Manager Self Service interface. At the top, there's a navigation bar with a back arrow, the text 'Manager Self Service', and the page title 'Performance'. On the right of the bar are icons for home, search, notifications, and a menu. Below the bar, the user's profile 'Christelle Stevenson, Clerk-Payroll Sr' is shown on the left, and 'Approve' and 'Deny' buttons are on the right. A status indicator 'In Process' is also present. The main content area is titled 'Performance Summary' and contains the following details: Document Type: Annual Review; Manager: Betty Locherty; Period Begin Date: 01/01/02; Period End Date: 12/31/02; Rating: Exceeds Expectations. There is a link 'View Performance Detail' next to the rating. Below this, there is a section for 'Approver Comments' with a text input field and a button to 'View Performance Detail'. At the bottom, there is an 'Approval Chain' section with a right-pointing arrow.

Video: [Image Highlights, PeopleSoft HCM Update Image 20: HCM Fluid Approvals](#)

Video: [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” (Application Fundamentals).

Field or Control	Description
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.

Field or Control	Description
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.

Field or Control	Description
View Performance Detail	Select to review document details before taking any approval action on the: • (Classic ePerformance) Manager Evaluation - Pending Approval Page. • (Fluid ePerformance) Performance Document Page (Evaluation Step). The document appears in read-only mode.

Related Links

[\(Classic\) Approving Documents](#)

Manager 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.

This example illustrates the fields and controls on the Manager Evaluation - Pending Approval page.

Annual Review

Manager Evaluation - Pending Approval

Christelle Stevenson

Actions

Job Title Clerk-Payroll Sr Manager Betty Locherty

Document Type Annual Review Period 01/01/2002 12/31/2002

Template Average - Appl After Review Document ID 263

Status Approval - Submitted Due Date 03/01/2003

Expand All | Collapse All

Section 1 - Mission Statement

Section 2 - Initiatives

Section 3 - Employee Goals

Section 4 - Responsibilities

Section 5 - Competencies

Section 6 - Overall Summary

Section 7 - Employee Comments

(Classic ePerformance) Use this page to review the document before taking any approval action, if needed.

(Fluid ePerformance) The system displays the Performance Document Page (Evaluation Step) in a modal for you to review the document.

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 Template Definition - Structure Page - Profile Management tab for the role.
2. If the Update Person Profile check box is selected, then the system identifies the profiles types that need to be updated for the employee. If a profile does not exist, the system create one for the employee.
3. The system copies all items for each section into the employee's profile.

Performing Administrative Tasks

Advancing Performance Documents

This topic provides an overview of the Advance Documents feature and discusses how administrators can advance performance documents to the target status.

Pages Used to Advance Performance Documents

Page Name	Definition Name	Usage
Advance by Document Search - Select Documents Page	EP_APP_SEL_FL	Define criteria for selecting documents to advance.
Advance by Document Search - Submit Page	EP_APP_ADV_FL	Select the target status for advancing selected documents.
Advance by Group/Department Page	EP_RUN_ADV_DOC	Define selection criteria and the target status for advancing documents by group or department.
Review Advanced Documents - List Page	EP_ADV_RES_LST_FL	View a list of completed document advancement process instances.
Review Advanced Documents - Detail Page	EP_ADV_REV_RPT_FL	View the advancement status of documents for selected process instances.

Understanding Document Advancement

Document advancement is an administrative function in the performance management process that enables the movement of multiple documents to a subsequent status. For example, if a manager is unavailable unexpectedly and their team's performance documents fall behind schedule, or if entire departments or groups are lagging during a performance cycle, the administrator can proactively advance those documents to keep the review process on track and ensure that all employees remain aligned with organizational timelines.

This feature allows administrators to advance documents that are in the following statuses:

- From *Track Progress - Checkpoint* to *Track Progress - <a subsequent checkpoint or Finalize Criteria>* or *Evaluation in Progress*

- From *Track Progress - Finalize Criteria* to *Evaluation in Progress*

If the options to copy the latest ratings, comments, or both from the Finalize Criteria step to the employee and manager evaluations are selected in the document template definition, these selections will be honored during document advancement.

- From *Pending Acknowledgement* to *Acknowledged*
- From *Pending Acknowledgement* to *Completed* (when there is no document approval)
- From *Acknowledged* to *Completed* (when there is no document approval)

Administrators can select documents to advance by specifying document criteria on the [Advance by Document Search - Submit Page](#). They can also advance documents for specific departments or groups of employees using the [Advance by Group/Department Page](#). After the Advance Performance Documents AE process (EP_ADV_DOC) is triggered from either advance document page and subsequently completed, the results of the process instance are available for review on the [Review Advanced Documents - List Page](#). The review page displays the status of each document included in the process instance, along with any warnings and errors. Errors must be resolved for documents to be eligible for advancement.

Here is an example of a document that was advanced from *Track Progress - Checkpoint 1* to *Evaluation in Progress*, displayed on the Performance Document page. From the popup menu that shows the overall progress of the document, the text *Admin Skipped* appears for any statuses that were bypassed as a result of the advancement process.

Performance Document

(Evaluation in Progress)

Cynthia Adams Corporate Controller • 16 Oct - 16 Nov 2025

Step 10 of 10

Evaluation

Step 1 - Due 30 Apr 2025
Define Criteria
Completed

Step 2 - Due 8 Aug 2025
Checkpoint 1 - Admin Skipped
Completed

Step 3 - Due 2 Sep 2025
Checkpoint 2 - Admin Skipped
Completed

Step 4 - Due 27 Sep 2025
Checkpoint 3 - Admin Skipped
Completed

Step 5 - Due 22 Oct 2025
Checkpoint 4 - Admin Skipped
Completed

Step 6 - Due 19 Jul 2025
Finalize Criteria - Admin Skipped
Completed

☆ ☆ ☆ ☆ ☆ Your rating is mandatory.

Audit information for skipped statuses in advanced documents is available on the [Last Updated Page](#).

Advance Document Notifications

The system supports the delivery of notifications for document advancement using Notification Composer. Notification content (email, phone, and in-app) is maintained in Text Catalog.

If the notification option for advancing documents is enabled on the ePerformance installation page, the system sends a notification to both the employee and manager for each document successfully advanced by the administrator, after the AE process is completed in confirm mode.

Users can select a notification entry or link to access the corresponding document on the [Performance Document Page](#).

If a document is successfully advanced to a new status, the system clears landing page notifications from the **Suggestions** and **Continue With** sections in the landing page for all users associated with that document.

Setting Up Advance Documents

To set up the Advance Documents feature, use the [ePerformance Installation - ePerformance Page](#) to:

1. Activate the feature by selecting the **Allow Administrator to Advance Document** field.

When enabled, pages for advancing documents become visible from the [Performance Management Tile](#) and in the menu navigation.

2. Enable notifications for document advancement by selecting the **Document Status was advanced** field.

User Roles

To use the Advance Documents feature, users need to be members of either:

- Both *ePerformance HR Admin Fluid* and *ePerformance HR Admin* roles, or
- The *Performance Administrator* role.

Advance by Document Search - Select Documents Page

Use the Advance by Document Search - Select Documents page (EP_APP_SEL_FL) to define criteria for selecting documents to advance.

Navigation:

- Select the [Performance Management Tile](#). On the left panel, select **Advance Documents**, then **Advance by Document Search**.
- **Workforce Development > Performance Management > Advance Documents > Advance by Document Search**

This example illustrates the fields and controls on the Advance by Document Search - Select Documents page.

Advance by Document Search

To advance a performance document, enter selection criteria and select the Search button to return a list of documents. Select the documents you wish to advance and then select the Next button. You can only advance one document status/sub status at a time.

Next

Search for Documents

*Document Type

Annual Review

*Template

Annual w/ MidPeriod & Career

Document Status

Track Progress

Sub Status

Checkpoint 1

Employee First Name

Employee Last Name

Manager First Name

Manager Last Name

Period Begin Date

01/01/2024

Period End Date

MM/DD/YYYY

Search

Clear

Documents

4 rows

☐	Name ↑↓	Employee ID ↑↓	Document Status ↑↓	Sub Status ↑↓	Period Begin Date ↑↓	Period End Date ↑↓	Manager ↑↓
☐	Roberta Chancelor	KUL702	Track Progress	Checkpoint 1	01/01/2024	12/31/2024	Betty Locherty
☐	Christelle Stevenson	KU0020	Track Progress	Checkpoint 1	01/01/2024	12/31/2024	Rosanna Channing
☐	Edmund Donahue	KU0102	Track Progress	Checkpoint 1	01/01/2024	12/31/2024	Rosanna Channing
☐	Shawn Quilligan	KU0039	Track Progress	Checkpoint 1	01/01/2024	12/31/2024	Rosanna Channing

Search for Documents

Use the search fields in this section to look up documents you wish you advance. Both **Document Type** and **Template** are required fields. Select the **Search** button to perform document search.

<i>Field or Control</i>	<i>Description</i>
Document Status and Sub Status	Select the document status from which you want to advance documents. You can only advance documents that belong to the <i>Acknowledged</i>, <i>Pending Acknowledgement</i> or <i>Track Progress</i> status. When <i>Track Progress</i> is selected, the Sub Status field becomes editable.

Documents

This section displays documents that match the search criteria. Select documents to advance.

Note: Only documents with the same status and sub-status can be selected to advance within a single process. To advance documents with different statuses, you must process them separately.

Advance by Document Search - Submit Page

Use the Advance by Document Search - Submit page (EP_APP_ADV_FL) to select the target status for advancing selected documents.

Navigation:

Select the **Next** button after selecting documents to advance on the [Advance by Document Search - Select Documents Page](#).

This example illustrates the fields and controls on the Advance by Document Search - Submit page.

Advance by Document Search

You have chosen to advance these documents. Select Submit to complete the advance document processing.

Process Monitor

Previous

Submit

From Document Status Track Progress

Sub Status Checkpoint 1

*To Document Status

*To Sub Status

*Run Type Preview Documents

Documents

Name	Document Type	Template	Document Status	Sub Status	Period Begin Date	Period End Date	Manager
Roberta Chancellor	Annual Review	Annual w/ MidPeriod & Career	Track Progress	Checkpoint 1	01/01/2024	12/31/2024	Betty Locherty
Christelle Stevenson	Annual Review	Annual w/ MidPeriod & Career	Track Progress	Checkpoint 1	01/01/2024	12/31/2024	Rosanna Channing
Edmund Donahue	Annual Review	Annual w/ MidPeriod & Career	Track Progress	Checkpoint 1	01/01/2024	12/31/2024	Rosanna Channing
Shawn Quilligan	Annual Review	Annual w/ MidPeriod & Career	Track Progress	Checkpoint 1	01/01/2024	12/31/2024	Rosanna Channing

4 rows

Field or Control	Description
Process Scheduler	Select this link to view the status of submitted processes in the Process Monitor on a modal page.
Submit	Select to run the Advance Performance Documents AE process (EP_ADV_DOC) with the specified parameters. Upon submission, the system displays a banner message acknowledging that the selected documents have been submitted for advancement. After the submitted process is complete, the results will be available for review on the Review Advanced Documents - List Page.
From Document Status and Sub Status	Displays the current status and sub-status (if applicable) of the selected documents, which are listed in the Documents section.
To Document Status and To Sub Status	Select the status and sub-status (if applicable) to which you want to advance the selected documents. The To document status value automatically becomes: <i>Evaluation in Progress</i> if the selected From document status and sub-status combination is <i>Track Progress - Finalize Criteria</i>. <i>Completed</i> if the selected From document status is <i>Acknowledged</i>.

Field or Control	Description
Run Type	Select how you want to run the Advance Performance Documents process. Available values include: <i>Preview Documents:</i> (Default value) Select this option to run the advance document process in preview mode and view the results on the Review Advanced Documents - List Page. In preview mode, the selected documents are not actually advanced; instead, the process results, including any warnings and errors, are displayed. When running the process for the first time, it is highly recommended to use preview mode to review and address all issues before proceeding with the process in confirm mode. <i>Confirm Documents:</i> Select this option to advance the selected documents to the specified status in the system.

Advance by Group/Department Page

Use the Advance by Group/Department page (EP_RUN_ADV_DOC) to define selection criteria and the target status for advancing documents by group or department.

Navigation:

- Select the [Performance Management Tile](#). On the left panel, select **Advance Documents**, then **Advance by Group/Department**.
- **Workforce Development > Performance Management > Advance Documents > Advance by Group/Department**

This example illustrates the fields and controls on the Advance by Group/Department page.

Advance by Group/Department

Run Control ID 1
[Report Manager](#)
[Process Monitor](#)

Run Request Parameters

*Document Type

*From Document Status

*To Document Status

Period Begin Date

*Template

*Sub Status

*To Sub Status

Period End Date

Run Type

☒ Preview Documents
☐ Confirm Documents

Advance Documents Using

☐ Group ID
☒ Department

Documents Using Department

Departments to Process

1-1 of 1

	Department	Description		
1			+	-

Run Request Parameters

Use the fields in this section to identify documents you wish to advance.

Field or Control	Description
Run Type	Select how to run the Advanced Performance Documents process: <i>Preview Documents:</i> (Default value) Select this option to run the advance document process in preview mode and view the results on the Review Advanced Documents - List Page. In preview mode, the selected documents are not actually advanced; instead, the process results, including any warnings and errors, are displayed. When running the process for the first time, it is highly recommended to use preview mode to review and address all issues before proceeding with the process in confirm mode. <i>Confirm Documents:</i> Select this option to advance the selected documents to the specified status in the system.

Advance Documents Using

Field or Control	Description
Group ID or Department	Select: • <i>Group ID</i> to advance documents for employees in the specified groups. • <i>Department</i> to advance documents for employees in the specified departments.

Documents Using Group ID

Specify one or more groups for documents to be advanced. This section appears when **Group ID** is selected in the **Advance Documents Using** section.

For each selected group, enter the as of date that is used by the process to return the list of group members (employees).

Groups are defined using Group Build. For more information about the feature, see “Understanding Group Build” (Application Fundamentals).

Documents Using Department

Specify one or more departments for documents to be advanced. This section appears when **Department** is selected in the **Advance Documents Using** section.

Review Advanced Documents - List Page

Use the Review Advanced Documents - List page (EP_ADV_RES_LST_FL) to view a list of completed document advancement process instances.

Navigation:

- Select the Performance Management Tile. On the left panel, select **Advance Documents**, then **Review Advanced Documents**.
- **Workforce Development > Performance Management > Advance Documents > Review Advanced Documents**

This example illustrates the fields and controls on the Review Advanced Documents - List page.

Review Advanced Documents

Filters

Document TypeAnnual Review

Document Status

Period Begin DateMM/DD/YYYY

Run Type

TemplateAnnual w/ MidPeriod & Career

Sub Status

Period End DateMM/DD/YYYY

Apply

Clear

Process History

31 rows

Process Date	Run Type	Document Type	Template	Document Status	Sub Status	Period Begin Date	Period End Date
28 Oct 2025 03:30:18 PM	Preview	Annual Review	Annual w/ MidPeriod & Career	Track Progress	Checkpoint 1		
27 Oct 2025 10:30:18 AM	Preview	Annual Review	Annual w/ MidPeriod & Career	Track Progress	Checkpoint 1		
23 Oct 2025 10:49:31 AM	Preview	Annual Review	Annual w/ MidPeriod & Career	Track Progress	Checkpoint 1	01/01/2024	12/31/2024

Filters

Use this section to filter process results to view as needed. For example, you can refine the list of results to only view processes that were run in preview mode or for a specific From document status.

Process History

This section lists the results of the requested Advance Performance Documents process that were submitted from the Advance by Document Search - Submit Page and Advance by Group/Department Page. Select a row to view the results of a specific process run.

Review Advanced Documents - Detail Page

Use the Review Advanced Documents - Detail page (EP_ADV_REV_RPT_FL) to view the advancement status of documents for selected process instances.

Navigation:

Select a row on the Review Advanced Documents - List Page.

This example illustrates the fields and controls on the Review Advanced Documents - Detail page.

Review Advanced Documents

Process Monitor

Run Confirmation

Document Type

Annual Review

From Document Status

Track Progress

To Document Status

Track Progress

Period Begin Date

01/01/2024

Template

Annual w/ MidPeriod & Career

Sub Status

Checkpoint 1

To Sub Status

Finalize Criteria

Period End Date

12/31/2024

Advance Documents - Preview

Document ID

Employee ID

Employment Record

Name

Manager

Preview Status

1343

KUL702

0

Roberta Chancellor

Betty Locherty

Warning

Section Competency Section does not have any items.

Section Goals does not have any items.

Notify

Return to Previous Page

The header area displays general information about the selected process.

Field or Control	Description
Run Confirmation and Process Monitor	Both Run Confirmation and Process Monitor appear when the run type of the selected process is <i>Preview Documents</i>. Select the Run Confirmation button to run the process again with the same parameters in confirm mode. This will advance the documents listed in the Advanced Documents - Preview section, except for those with errors. If documents are reported with errors, resolve the issues and rerun the process in preview mode. The process validates all selected documents again for advancement, and you can verify in the results whether the issues have been fixed. Repeat as needed until all errors are resolved, or select Run Confirmation to advance documents that do not have errors. Use the Process Monitor link to view the status of submitted processes.

Advance Documents - <Run Type>

This section lists the status of the documents included in the process.

The section title shows the run type (*Confirm* or *Preview*) of the selected process dynamically.

Field or Control	Description
<Run Type> Status	Displays the status of the document. Available values are: <i>Success</i>: indicates that the document was (or will be) advanced successfully after process completion. <i>Warning</i> or <i>Warning - Processed</i>: validation checks identified warnings in the document, as displayed. The document can still be advanced with warnings. <i>Error</i>: validation checks identified errors in the document, as displayed. Errors must be addressed before the document can be advanced.
Notify	Select to compose an email message to the manager of the document. For example, you can notify the manager about errors in the document that must be resolved before it can be advanced. This link is not available if the status is <i>Success</i> .
Return to Previous Page	Select to return to the Review Advanced Documents - List Page .

Working With Automatic Document Transfer

This topic provides overviews of the Automatic Document Transfer feature and its setup, and discusses how to view the status summary of documents as a result of an automatic transfer.

Pages Used to Work With Automatic Document Transfer

Page Name	Definition Name	Usage
ePerformance Installation - ePerformance Page	EP_INSTALLATION	Enable the automatic document transfer functionality.
Auto Transfer Document Status Page	EP_XFER_LOG_FL	View the status summary of in-progress documents that were eligible for automatic transfer.
Auto Transfer Document Status Page (Confirm Transfer)	EP_AUTOXFER_CON_FL	Confirm and complete the document transfer.

Understanding Automatic Document Transfer

When managers are changed for employees who have documents that are currently in progress, the documents need to be handed over to other managers in the organization for the reviews to continue. ePerformance delivers a functionality that automatically transfers employees' in-progress documents in these situations:

- Managers are terminated and they are listed as the manager of employee's documents.
- Employees have new managers after transferring to different jobs or positions.

Documents are considered *in-progress* when they are not completed or canceled.

Note: If the effective date of a manager's termination or employee manager change is the current or a past date, the transfer of the documents happens immediately. If the manager termination or change is future-dated, the automatic document transfer application engine process (EP_AUTO_XFER) will be submitted to the Process Scheduler to run on the future effective date instead.

Video: [Image Highlights, PeopleSoft HCM Update Image 30: ePerformance Auto-Transfer Documents](#)

Video: [Image Highlights, PeopleSoft HCM Update Image 31: ePerformance Auto-Transfer Document Enhancements](#)

Video: [Image Highlights, PeopleSoft HCM Update Image 32: ePerformance Auto-Transfer Document on Manager Change](#)

Manager Termination

When a manager is terminated, the system changes the HR status of his or her job to *Inactive* in job data. This job data change triggers the Automatic Document Transfer feature that finds all in-progress documents with this terminated individual as the manager. Using the Direct Reports functionality, it identifies the active next-level-up manager for the terminated individual based on the selected access type, and transfers the in-progress documents to the new manager. After the transfer is completed, the new manager receives a system-generated email notification (an option on the [ePerformance Installation - ePerformance Page](#)) about the documents that are transferred to him or her.

Change in Employee Manager

The Automatic Document Transfer feature is triggered when one or more of these fields are updated in an employee's Job record in a new effective-dated row as a result of a job or position transfer, and the job change results in a change in manager or supervisor:

- Department

Note: If the Manager ID value is updated in a new effective-dated row for a department in the Departments component (DEPARTMENT_TBL), the Automatic Document Transfer feature finds all employees belonging to this department, and transfers their in-progress documents from the current department manager to the new department manager. For employees that have multiple jobs, all documents associated to their jobs will be transferred.

- Supervisor ID

This value updates automatically if the department is changed and the new department is associated with a different manager ID.

- Position Number
- Reports To

This value updates automatically if the position number is changed and the new position is associated with a different Reports To value.

Note: If the Reports To value is updated in a new effective-dated row for a position in the Position Data component (POSITION_DATA) with the **Update Incumbents** option selected, the system automatically adds a new row to the job data of the position's incumbents with the new Reports To value. For incumbents that have multiple jobs, the system adds new rows to all of their jobs. The Automatic Document Transfer feature does not support the transfer of documents if the Report To value is updated for a position that does not have the **Update Incumbents** option selected. In this case, documents will need to be manually transferred either by administrators using the [Performance Management Tile](#), or current managers on the [Transfer Documents Page \(Team Performance\)](#).

The feature finds all in-progress documents for this employee that meet the requirements configured in the ePerformance installation. Using the Direct Reports functionality, it identifies the new manager based on the selected access type, and transfers the in-progress documents to the new manager. After the transfer is completed, the new manager receives a system-generated email notification (an option on the [ePerformance Installation - ePerformance Page](#)) about the documents that are transferred to him or her.

Note: The Automatic Document Transfer feature does not support updates that occur in correction mode.

(For Administrators) Viewing Document Transfer Statuses

Automatic document transfer may not happen for a number of reasons, for example, the next-level-up manager cannot be found, the terminated manager has other active jobs, or the document didn't meet the period end date setup requirement in the system. Administrators can review overall document transfer statuses and information on the [Auto Transfer Document Status Page](#). They can transfer documents that were not automatically transferred successfully, and delete completed rows from the search result.

Related Links

[Performance Management Tile](#)

Setting Up Automatic Document Transfer

To set up automatic document transfer:

- On the [ePerformance Installation - ePerformance Page](#), select:
 - The **Enable on Manager Termination** option to enable document transfer as a result of a manager termination.
 - The **Enable on Change Employee Manager** option and associated setup parameters to enable document transfer as a result of an employee manager change.

Then, select the applicable access type.

- Make sure that the Integration Broker is configured, and that these events are activated in the Event Framework:
 - (For manager termination) *AssignmentTerminated*
 - (For employee manager change) *DRJobUpdatesWithFuture* and *DRDeptMgrWithFuture*
- Select the **Ownership of document was transferred (Recipient is new owner)** option on the ePerformance Installation - ePerformance Page, if you wish the system to generate email notifications for document transfer. The option is used by the Automatic Document Transfer feature to send email notifications to new managers.
- (For manager termination) Select the **Automatic Job Termination** installation option on the “Product Specific Page” (Application Fundamentals).

Auto Transfer Document Status Page

Use the Auto Transfer Document Status page (EP_XFER_LOG_FL) to view the status summary of in-progress documents that were eligible for automatic transfer.

Navigation:

Click the title of the default home page and select *Talent Administrator* from the list that appears.

Click the Performance Management Tile to open the Performance Management application start page, and click **Auto Transfer Document Status** from the navigation collection.

This example illustrates the fields and controls on the Auto Transfer Document Status page.

Auto Transfer Document Status
Delete
Transfer

To Delete the transaction data from the Auto Transfer Document Status page, select one or more rows and then select Delete.

To Transfer documents to a new manager, select one or more transaction rows, then select Transfer. After the Transfer, the transaction data will be removed from this Status page.

▼ Search for Documents

First Name

Manager First Name

Document Type

Transfer Begin Date

Transfer Type

Last Name

Manager Last Name

Status

Transfer End Date

Search
Clear

3 rows

☐	Transfer Date	Status	Transfer Type	Manager / Employee ID	Employee / Employee ID	Document Type	Period Begin / Period End	New Manager / Employee ID
☐	07/24/2019	Within Days to Period End Date	Employee Transfer	Douglas Lewis KU0001	Charles Baran KU0002	Performance Document	01/01/2019 07/31/2019	
☐	07/24/2019	Complete	Employee Transfer	Douglas Lewis KU0001	Charles Baran KU0002	Annual Review	01/01/2017 12/31/2017	Jason Tomita KU0078
☐	07/23/2019	Manager still has active job	Manager Termination	Ronnie Merin HXPERF01	Leina Davis HXPERF02	Annual Review	01/01/2013 12/31/2013	

As an administrator, you can view the status summary of documents that were processed for the Automatic Document Transfer feature.

Field or Control	Description
Delete	Click to delete selected rows (for example, for documents that were transferred automatically) from the search result.
Transfer	Click to transfer selected documents manually. Choose a manager to whom to transfer the selected documents on the Select a Manager page (HR_PSEL_FLU).

Search for Documents

Use this section to refine the search result by entering one or more of these search values: the employee's first and last names, current manager's first and last names, document type, transfer type, transfer status, and time period during which the document transfer took place.

Field or Control	Description
Transfer Type	Select to refine the search result by document transfer type. Values are <i>Employee Transfer</i> and <i>Manager Termination</i>. The selected transfer type determines the list of available transfer statuses in your search. When you access this page initially, the system displays results for all transfer types.

Field or Control	Description
Status	Select to refine the search result by document transfer status. Valid values are: <i>Complete</i>: The document was transferred to the new manager successfully. This status is applicable to all access types. <i>Manager still has active Job</i>: The document was not transferred because the terminated manager had multiple jobs. He or she was terminated from one job, and still had other active jobs in the system. This status is applicable to all access types and the <i>Manager Termination</i> transfer type. <i>No Manager found</i>: The document was not transferred because no manager was found for the terminated manager or the employee with the job change. This status is applicable to <i>By Department Manager ID</i> and <i>By Part Posn Mgmt Dept Mgr ID</i> access types. <i>No Reports To found</i>: The document was not transferred because either the <i>Reports To</i> field value was missing from the job data of the terminated manager, or the <i>Reports To</i> field of the employee's new position was blank on the Position Data - Description page. This status is applicable to the <i>By Reports To Position</i> access type. <i>No Supervisor found</i>: The document was not transferred because no supervisor was found for the terminated manager or the employee with the job change. This status is applicable to <i>By Supervisor ID</i> and <i>By Part Posn Mgmt Supervisor</i> access types. <i>Dept has no previous manager</i>: The document was not transferred because the employee's department, which didn't have a manager specified previously, had a new manager. The system could not identify from whom the document to transfer if the previous department manager was not available. This status is applicable to the <i>Employee Transfer</i> transfer type. <i>Reports To field is blank</i>: The document was not transferred because the Reports To field was blank on the "Position Data - Description Page" (PeopleSoft Human Resources Manage Positions). This status is applicable to the <i>By Reports To Position</i> access type. <i>Within Days to Period End Date</i>: The document was not transferred because the date when manager change occurred was less than the number of days before the document's period end date. This status is applicable to the <i>Employee Transfer</i> transfer type.

Field or Control	Description
	<i>Past Period End Date:</i> The document was not transferred because the date when manager change occurred was after the document's period end date, and the option to transfer documents with manager change past the period end date was disabled. This status is applicable to the <i>Employee Transfer</i> transfer type.
 (Download to Excel)	Click to download the displayed search result to an .xls file.
 (Sort)	Click to sort the displayed search result by column header.

Auto Transfer Document Status Page (Confirm Transfer)

Use the Auto Transfer Document Status page (Confirm Transfer) (EP_AUTOXFER_CON_FL) to confirm and complete the document transfer.

Navigation:

Select one or more documents to be transferred and click the **Transfer** button.

This example illustrates the fields and controls on the Auto Transfer Document Status page (confirm transfer).

Auto Transfer Document Status

Cancel

Save

You have chosen to transfer the document(s) listed to another manager.
To select or change the receiving manager, use the "Select Manager" button. To complete the transfer select the Save button.

New Manager Netty Owyang

Select Manager

1 row

Employee / Employee ID

Document Type

Period Begin / Period End

Group Box

Adland Chu KU0065	Developmental Document	10/01/2004 12/31/2004	

The selected manager is listed for the document transfer. Reselect a different manager if needed.

Click Save to complete the transaction.

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

<i>Page Name</i>	<i>Definition Name</i>	<i>Usage</i>
<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 <i>Evaluation in Progress</i> .
Confirm Reopen Document Page	EP_APPR_STATUS	Confirm the status change to be made on the selected documents.
<u>Cancel Document Page</u>	EP_APPR_SELECT	Cancel documents.
Confirm Cancellation Page	EP_APPR_CANCEL	Confirm document cancellation.
<u>Delete Documents Page</u>	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: These administrative tasks are available to administrators and managers both on Fluid homepages and from the Navigator menu. When accessed from the Navigator, do not add these task pages to a Fluid homepage or the NavBar from the Actions menu.

Refer to the [Performance Management Tile](#) and [Team Performance Tile](#) topics for more information about performing administrative tasks in fluid.

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 on pages for historical documents instead of the current documents.

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 Installation - 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 Installation - 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, and all pending approval requests created for the employee.

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 navigation collection) Select the [Performance Management Tile](#). On the left navigation, select **Performance Documents > Transfer Performance Document**, or **Development Documents > Transfer Development Document**
- (Classic) **Workforce Development > Performance Management > Performance Documents > Administrative Tasks > Transfer Performance Document > Transfer Document**
- (Classic) **Workforce Development > Performance Management > Development Documents > Administrative Tasks > Transfer Development Document > Transfer Document**
- (Classic) **Manager Self Service > Performance Management > Performance Documents > Administrative Tasks > Transfer Performance Document > Transfer Document**
- (Classic) **Manager Self Service > Performance Management > Development Documents > Administrative Tasks > Transfer Development Document > Transfer Document**

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

Transfer Document

To transfer a performance document, select the checkbox for the Employee and then select the Continue push button.

▼ Search for Documents

First Name

Last Name

Manager First Name

Last Name

Document Type

Document Status

Period Between -

Performance Documents

	Name	Document Type	Document Status	Period Begin	Period End	Job Title	Manager
☒	Rosanna Channing	Annual Review	Define Criteria	01/01/2020	12/31/2020	Senior Accounting Manager	Betty Locherty
☐	Rosanna Channing	Annual Review	Define Criteria	02/02/2012	12/31/2012	Senior Accounting Manager	Betty Locherty

Select All Deselect All

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.

This example illustrates the fields and controls on the Confirm Transfer page.

[Transfer Document](#)
Confirm Transfer

Performance Documents

Q

1-1 of 1

Name	Document Type	Document Status	Period Begin	Period End	Job Title	Manager
Rosanna Channing	Annual Review	Define Criteria	01/01/2020	12/31/2020	Senior Accounting Manager	Betty Locherty

You have chosen to transfer the document indicated to another manager.
Select the receiving manager by using the "Select a Manager" hyperlink, then select the **Save** button to complete the transfer.

New Manager ID: [Select a Manager](#)

[Return to Previous Page](#)

Field or Control	Description
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 navigation collection) Select the [Performance Management Tile](#). On the left navigation, select **Performance Documents > Reopen Performance Document**, or **Development Documents > Reopen Development Document**.
- (Classic) **Workforce Development > Performance Management > Performance Documents > Administrative Tasks > Reopen Performance Document > Reopen Document**
- (Classic) **Workforce Development > Performance Management > Development Documents > Administrative Tasks > Reopen Development Document > Reopen Document**
- (Classic) **Manager Self Service > Performance Management > Performance Documents > Administrative Tasks > Reopen Performance Document > Reopen Document**
- (Classic) **Manager Self Service > Performance Management > Development Documents > Administrative Tasks > Reopen Development Document > Reopen Document**

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

Reopen Document

To change a performance document's status back to "Evaluation", select the checkbox next to the Employee's Name and then select the Continue push button.

▼ Search for Documents

First Name

Last Name

Manager First Name

Last Name

Document Type

Document Status

Period Between

BETTY

Shared with Employee

Search

Clear

Performance Documents

	Name	Document Type	Document Status	Period Begin	Period End	Job Title	Manager
☐	Carmichael Espinosa	Project Review	Shared with Employee	06/15/2002	12/31/2002	Consultant-Senior	Betty Locherty
☐	Connie Chung	Annual Review	Shared with Employee	01/01/2002	12/31/2002	Auditor-General	Betty Locherty

Select All

Deselect All

Continue

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

[\(Classic\) Managing Document Processes](#)

Cancel Document Page

Use the Cancel Document page (EP_APPR_SELECT) to cancel documents.

Navigation:

- (Fluid navigation collection) Select the [Performance Management Tile](#). On the left navigation, select **Performance Documents** > **Cancel Performance Documents**, or **Development Documents** > **Cancel Development Documents**.

- (Classic) **Workforce Development > Performance Management > Performance Documents > Administrative Tasks > Cancel Performance Documents > Cancel Document**
- (Classic) **Workforce Development > Performance Management > Development Documents > Administrative Tasks > Cancel Development Documents > Cancel Document**
- (Classic) **Manager Self Service > Performance Management > Performance Documents > Administrative Tasks > Cancel Performance Documents > Cancel Document**
- (Classic) **Manager Self Service > Performance Management > Development Documents > Administrative Tasks > Cancel Development Documents > Cancel Document**

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

Cancel Document

To cancel a performance document, select the checkbox for the Employee and then select the Continue push button. All documents can be canceled except for already "Canceled" performance documents.

▼ Search for Documents

First Name

CHRISTELLE

Last Name

Manager First Name

Last Name

Document Type

Document Status

Period Between

01/01/2020
 -

Search

Clear

Performance Documents

	Name	Document Type	Document Status	Period Begin	Period End	Job Title	Manager
☐	Christelle Stevenson	Annual Review	Define Criteria	01/01/2020	12/31/2020	Manager-Accounting	Rosanna Channing

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

Continue

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 navigation collection) Select the [Performance Management Tile](#). On the left navigation, select **Performance Documents > Delete Performance Documents**, or **Development Documents > Delete Development Document**
- (Classic) **Workforce Development > Performance Management > Performance Documents > Administrative Tasks > Delete Performance Documents > Delete Documents**
- (Classic) **Workforce Development > Performance Management > Development Documents > Administrative Tasks > Delete Development Documents > Delete Documents**
- (Classic) **Manager Self Service > Performance Management > Performance Documents > Administrative Tasks > Delete Performance Documents > Delete Documents**
- (Classic) **Manager Self Service > Performance Management > Development Documents > Administrative Tasks > Delete Development Documents > Delete Documents**

This example illustrates the fields and controls on the Delete Documents page.

Delete Documents

To delete a performance document, select the checkbox next to the Employee's Name and then select the Continue push button. Only "Canceled" performance documents can be deleted.

Search for Documents

First Name

Last Name

Manager First Name

Last Name

Document Type

Document Status

Period Between

Search

Clear

Performance Documents

	Name	Document Type	Document Status	Period Begin	Period End	Job Title	Manager
☐	Shawn Quilligan	Project Review	Canceled	01/01/2019	02/28/2019	Financial Analyst	Betty Locherty
☐	Vicki Zinn	Project Review	Canceled	01/01/2019	02/28/2019	Accountant	Betty Locherty

Select All

Deselect All

Continue

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.

(Classic) Managing Document Processes

This section presents an overview of document process management and lists the pages used to manage document processes in Classic Plus mode.

Note: A fluid version of ePerformance is now available to support employee performance reviews. For more information, see [Understanding Fluid ePerformance](#).

Pages Used to Manage Document Processes

<i>Page Name</i>	<i>Definition Name</i>	<i>Usage</i>
View-Only Documents Page (View Performance Documents Page)	EP_APPR_SELECT	Select to view performance documents. See Current <Performance or Development> Documents Page or <Performance or Development> Documents Page
View-Only Documents Page (View Development Documents Page)	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

[\(Classic\) Accessing Documents](#)

[\(Classic\) Modifying Evaluation Criteria](#)

(Classic) 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.

Note: A fluid version of the Business Objectives functionality is now available to support the creation and management of business objectives for organizations.

For more information, see [Understanding Fluid Business Objectives](#).

Pages Used to Create Business Objectives Pages

<i>Page Name</i>	<i>Definition Name</i>	<i>Usage</i>
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 executive's 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 set up the plan, create 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* (HCCPEP2300) 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 [Identifying Business Objective Nodes](#).

Manager Role

Once the page has been created and the page owner identified, the page owner will need access to their objectives page to add and update 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.

Note: (Fluid Business Objectives) Managers can create business objective documents.

Common Elements Used in this Section

<i>Field or Control</i>	<i>Description</i>
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 <i>Active</i> .
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

This example illustrates the fields and controls on the Create Business Objectives - Select Objective Plan page.

Create Business Objectives		
Create Business Objectives		
Select Objective Plan		
Choose an Objective Plan by selecting the appropriate hyperlink		
Objective Plan		
Objective Plan	Objective Plan Begin date	Objective Plan End Date
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
2016 Business Objectives	07/01/2015	12/31/2016
2023 Business Objectives	07/01/2022	12/31/2023

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.

This example illustrates the fields and controls on the Create Business Objectives page.

Create Business Objectives

Complete the information in the *Home Page Creation Details* section. Once the creation details have been chosen, select the **Create Page** pushbutton to generate the objective page(s).

Home Page Creation Details

Objective Plan2023 Business Objectives

Effective Date04/12/2024

Template

Publication Due Date

☐ Set Owner to Department Manager

Department Selection

Set ID

Department ID

Department Name

Create Objective Pages

Home Page Creation Details

Field or Control	Description
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.

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Department Selection

If you selected *Department* as the hierarchy method on the Objective Plan page, the system displays these fields in the grid:

Field or Control	Description
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:

Field or Control	Description
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 Pages** button on the Create Business Objectives page.

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

Create Objective Pages - Confirmation

Home Page Creation Details

Objective Plan

2023 Business Objectives

Effective Date

04/12/2024

Template

Higher Education Objectives

Pages Created

The following Objective Pages have been successfully created.

Selected Departments

<<

<

1-1 of 1

>

>>

Set ID	Department	Description	Page Owner	Message
SHARE	11000	Information Systems	Calvin Roth	Objective Page Created Successfully

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.

(Classic) Managing Business Objectives

This topic discusses how to manage business objectives.

Note: A fluid version of the Business Objectives functionality is now available to support the creation and management of business objectives for organizations.
For more information, see [Understanding Fluid 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.

Page Name	Definition Name	Usage
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.
<u>Update Objectives - <Department or Position> Page</u>	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.
<u>View Objectives - <Name of Objective> Page</u>	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 navigation collection) Select the Performance Management 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**

This example illustrates the fields and controls on the Manage Business Objectives - Select Objective Plan page.

Manage Business Objectives		
Select Objective Plan		
To Manage an Objective Page, select the Objective Plan hyperlink under which that page exists.		
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
2016 Business Objectives	07/01/2015	12/31/2016
2023 Business Objectives	07/01/2022	12/31/2023

Note: This page is specific to administrators and does not apply to managers and employees.

Field or Control	Description
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 Objective Plan page (EPO_PLAN_SELECT).
- **Manager Self Service > Performance Management > Business Objectives > Manage My Objectives > Manage My Objectives - Select Business Objectives**

This example illustrates the fields and controls on the Manage Business Objectives - Select Business Objectives page.

Manage Business Objectives

Select Business Objectives

Enter search criteria to find the objective pages you would like to manage. To Update your Business Objectives, select the Update hyperlink. To View the Objectives, select the View hyperlink.

Objective Plan 2023

Search Criteria

Set ID

SHARE

Department

Objectives Owner

Status

Search

Clear

Business Objectives

Title	Set ID	Department Description	Status	Objectives Owner	Update Objectives	View Objectives
2023 Business Objectives Commerical Operations	SHARE	Commerical Operations	Published	Douglas Lewis	Update	View
2023 Business Objectives Corporate Accounting	SHARE	Corporate Accounting	In Progress - Assigned	Rosanna Channing	Update	View

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.

Field or Control	Description
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.

Field or Control	Description
Status	Select one of these values: • <i>In Progress - Assigned</i> • <i>In Progress - Unassigned</i> • <i>Published</i> • <i>Ready To Publish</i>
Search	Click to generate a list of pages that match the search criteria.

Business Objectives

Field or Control	Description
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).

This example illustrates the fields and controls on the Update Objectives - <Department or Position> page (1 of 3).

Update Objectives

Department 13100 - Corporate Finance

Department
13100 - Corporate Finance

Period
07/01/2022
To
12/31/2023

Objective Plan
2023
2023 Business Objectives

Template ID
KCORP
Corporate Objectives Template

Effective Date
08/19/2023

Status
In Progress - Assigned

Title
2023 Business Objectives Corporate Finance

Objectives Owner
KU0007
Betty Locherty

Owner Title
Finance Director

Alternate Editor

Comments

Save
Cancel
Preview
Submit For Publication
View Different Objectives

Expand All
Collapse All

This example illustrates the fields and controls on the Update Objectives - <Department or Position> page (2 of 3).

Section 1 - Customer Loyalty

Expand
Collapse

Demonstrate Customer Respect and Loyalty

Title
Demonstrate Customer Respect and Loyalty

Description
: Continue to earn customer respect and loyalty by consistently providing the highest quality and value to our customers.

Measurement
: Maintain an average score of Exceeds Expectations on the quarterly customer loyalty surveys.

Status:

Percent Complete: 0

Due Date :

Aligned To

Title
Increase customer satisfaction by 10%

Add Sub Customer Loyalty

Last Modified By

Add Customer Loyalty

This example illustrates the fields and controls on the Update Objectives - <Department or Position> page (3 of 3).

Section 2 - Profitability

Expand

Collapse



> Increase Profits to Create Shareholder Value

+

Add Profitability

Section 3 - Employee Commitment

Save

Cancel

Preview

Submit For Publication



View Different Objectives

<i>Field or Control</i>	<i>Description</i>
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 <i>Long Format</i> .

Field or Control	Description
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 <i>Long Format</i> .
 Aligned Items	Click the Aligned Items icon to view in a bar graph the number of employee alignment for each objective in the section.
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.

This example illustrates the fields and controls on the View Objectives - <Name of Objective> page.

View Objectives
2023 Business Objectives Finance

Department13000 - Finance and Administration
Period07/01/2022To12/31/2023
Objective Plan20232023 Business Objectives
Objectives OwnerJean Parsons
TitleChief Finance Officer
Template IDKCORPCorporate Objectives Template



ReturnView Different Objectives

Expand AllCollapse All

Section 1 - Customer Loyalty

ExpandCollapse


> Demonstrate Customer Respect and Loyalty

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" (Application Fundamentals).

Field or Control	Description
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 in a bar graph the number of employee alignment for each objective in the section on the <section name> page (EPO_ALIGN_SUM).

Publishing Business Objectives

This topic discusses how to publish business objectives as administrators.

Note: (Fluid) Managers or alternate editors can publish business objective documents, if enabled. For more information, refer to the [Publish Page](#) topic.

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

This example illustrates the fields and controls on the Publish Business Objectives - Select Objective Plan page.

Publish Business Objectives		
Publish Business Objectives		
Select Objective Plan		
Choose an Objective Plan by selecting the appropriate hyperlink		
Objective Plan		
Objective Plan	Objective Plan Begin date	Objective Plan End Date
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
2016 Business Objectives	07/01/2015	12/31/2016
2023 Business Objectives	07/01/2022	12/31/2023

Select the link associated with the objective plan for which you want 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.

This example illustrates the fields and controls on the Publish Business Objectives - Select Page to Publish page.

Publish Business Objectives

Publish Business Objectives

Select Page to Publish

Enter search criteria to find the objective pages that you want to publish. Select the checkbox next to each page you want to publish and then select the Continue button.

Objective Plan

2023

2023 Business Objectives

Search Criteria

Set ID

SHARE

Department

Status

Search

Clear

Field or Control	Description
Set ID	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.

<i>Field or Control</i>	<i>Description</i>
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.

Related Links

[Understanding Fluid Business Objectives](#)

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

<i>Page Name</i>	<i>Definition Name</i>	<i>Usage</i>
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.

Note: (Fluid) Managers or alternate editors can run the Cascade Objective Items process directly from their business objective document sections, if enabled. For more information, refer to the [Cascade Items Page](#) topic.

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:

Workforce Development > Performance Management > Business Objectives > Cascade Objective Items > Select Objectives

This example illustrates the fields and controls on the Select Objectives page.

Cascade Objective Items

Select Objectives

Document Parameters

Run Control ID

PS

Report Manager

Process Monitor

Run

*Objective Plan

2023

Set ID

SHARE

2023 Business Objectives

Department ID

13100

*Section Type

Customer Loyalty

Cascade Run Type

☒ Preview Cascade Items
 ☐ Confirm Cascade Items

Page Title

2016 Business Objectives Corporate Finance

Page Owner

KU0007

Section : Customer Loyalty

1-2 of 2

	Objective Title
☐	Provide Internal Customers with Accurate Timely Reports
☐	Answer Customer Questions in Timely and Professional Manner

Select All

Deselect All

Field or Control	Description
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 .

Field or Control	Description
Cascade Run Type	Select Preview Cascade Items (default value) if you want to preview the results of the process in the Cascade Item report (EP_CASCADE.pdf) that is available in the Report Manager. This option generates the report that lists if and to which documents the selected items would be cascaded successfully. It does not actually 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. This option also generates the Cascade Item report.
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

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

Cascade Objective Items

[Select Objectives](#)
Document Parameters

Run Control ID PS
Report Manager
Process Monitor
Run

ePerformance Document Parameters

*Document Type PERFORM

*Period Begin Date 07/01/2022

*Manager ID KU0007

*Cascade Levels One

Section Type Goals & Objectives

Period End Date

☐ Overwrite existing Item?

Field or Control	Description
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 system follows the direct report method used in ePerformance to determine the manager's direct reports.
Overwrite existing item?	Select this check box if you want to overwrite items that already exist on the documents to which you are cascading items.
Cascade Levels	Select either <i>One</i> or <i>All</i> to indicate the number of levels to which you want to cascade items down to the selected documents. Selecting <i>All</i> will cascade items to the documents of all direct and indirect reports of the manager. Selecting <i>One</i> will only cascade items to documents of the manager's direct reports.

Related Links

[Understanding Fluid Business Objectives](#)

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).
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: <i>In Progress - Assigned</i> , <i>In Progress - Unassigned</i> , <i>Inactive</i> , <i>Published</i> , and <i>Ready to Publish</i> .
Review Manager Cascaded Items Page	EPO_CASC_RUN_FL	Review a list of item cascading processes run by managers.

Page Name	Definition Name	Usage
<u>Cascaded Items Page (Read-only)</u>	EPO_CASC_PARAM_FL	Review parameters and report results of selected cascade processes.

Common Elements Used in this Section

Field or Control	Description
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: • <i>In Progress - Assigned</i> • <i>In Progress - Unassigned</i> • <i>Inactive</i> • <i>Published</i> • <i>Ready to Publish</i> 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:

Workforce Development > Performance Management > Business Objectives > Administer Business Objectives > Assign/Transfer Objectives

Select an objective plan on the Assign/Transfer Business Objectives - Select Objective Plan page.

This example illustrates the fields and controls on the Assign/Transfer Business Objectives page.

Administer Business Objectives

Assign/Transfer Business Objectives

Select the action you would like to perform along with any other required information. Depending upon the action selected the Status field may not be available.

Objective Plan

2023

2023 Business Objectives

Action

Assign Objectives Owner

Search Criteria

Set ID

SHARE

Department

Objectives Owner

Status

Search

Clear

Return

Field or Control	Description
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 <i>Assign Objective Owner</i> 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:

Workforce Development > Performance Management > Business Objectives > Administer Business Objectives > Manage Objective Status

Select an objective plan on the Manage Objectives Status - Select Objective Plan page.

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This example illustrates the fields and controls on the Manage Objectives Status page.

Administer Business Objectives

Manage Objectives Status

There are no Business Objectives to display

Objective Plan

2009

2009 Business Objectives

Action

Delete Business Objectives

Search Criteria

Set ID

SHARE

Q

Department

Q

Objectives Owner

Q

Status

Search

Clear

Business Objectives

Select	Title	Set ID	Department Description	Status	Objectives Owner	Update Objectives	View Objectives
☐	2009 Business Objectives Sales Administration	SHARE	Sales Administration	In Progress - Assigned	Dominick Osorio	Update	View

Select All

Deselect All

Continue

Field or Control	Description
Action	Select one of these actions, enter your search criteria, and then click Search to view a list of objectives: <i>Delete Business Objectives</i> <i>Inactivate Objectives</i> <i>Lock Objectives</i> <i>Reactivate Objectives</i> <i>Unlock Objectives</i> Note: If you select <i>Reactivate Objectives</i>, the system automatically selects <i>Inactive</i> 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:

Workforce Development > Performance Management > Business Objectives > Administer Business Objectives > Review Late Objectives

Select an objective plan on the Review Late Objectives - Select Objective Plan page.

This example illustrates the fields and controls on the Review Late Objectives page.

Administer Business Objectives

Review Late Objectives

Select the action you would like to perform along with any other required information. Depending upon the action selected the Status field may not be available.

Objective Plan

2009

2009 Business Objectives

Action

Review Late Objectives

Search Criteria

Set ID

SHARE

Department

Objectives Owner

Status

Search

Clear

Business Objectives

Select	Title	Set ID	Department Description	Status	Objectives Owner	Update Objectives	View Objectives
☐	2009 Business Objectives Sales Administration	SHARE	Sales Administration	In Progress - Assigned	Dominick Osorlo	Update	View

Select All

Deselect All

Continue

With the *Review Late Objectives* action preselected, 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:

Workforce Development > Performance Management > Business Objectives > Administer Business Objectives > Review Objectives by Status

Click an objective plan on the Review Objectives by Status - Select Objective Plan page.

This example illustrates the fields and controls on the Review Objectives by Status page.

Administer Business Objectives

New Window

Review Objectives by Status

Select the action you would like to perform along with any other required information. Depending upon the action selected the Status field may not be available.

Objective Plan

2023

2023 Business Objectives

Action

Review Objectives by Status

Search Criteria

Set ID

SHARE

Department

Objectives Owner

Status

Search

Clear

Business Objectives

Select	Title	Set ID	Department Description	Status	Objectives Owner	Update Objectives	View Objectives
☐	2023 Business Objectives Accounts Receivable	SHARE	Accounts Receivable	Published	Christelle Stevenson	Update	View

With the *Review Objectives by Status* action preselected, enter your search criteria, and then click **Search** to view a list of objectives.

Related Links

[Understanding Fluid Business Objectives](#)

Review Manager Cascaded Items Page

Use the Review Manager Cascaded Items page (EPO_CASC_RUN_FL) to review a list of item cascading processes run by managers.

Navigation:

- **Workforce Development > Performance Management > Business Objectives > Administer Business Objectives > Review Manager Cascaded Items**
- Select the [Performance Management Tile](#). From the page that appears, select **Objectives > Review Manager Cascaded Items**.

Note: The Review Manager Cascaded Items page is applicable to Fluid Business Objectives only.

This example illustrates the fields and controls on the Review Manager Cascaded Items page.

Review Manager Cascaded Items					
Cascaded Items 4 rows Filter Search Sort					
Business Objectives TL	Section Type TL	Document Type TL	Run Type TL	Submitted Date/Time TL	Submitted By TL
2016 Business Objectives Corporate Finance	Profitability	Performance Document	Preview	01/18/2024 9:08:34AM	Betty Locherty >
2023 Business Objectives Corporate Finance	Employee Commitment	Annual Review	Preview	01/18/2024 9:02:13AM	Betty Locherty >
2016 Business Objectives Corporate Finance	Customer Loyalty	Performance Document	Confirm	01/17/2024 6:10:40PM	Betty Locherty >
2016 Business Objectives Corporate Finance	Employee Commitment	Performance Document	Preview	01/17/2024 12:25:29PM	Betty Locherty >

The Review Manager Cascaded Items page displays the latest results for each business objective document and section type combination that was used to run the Cascade Objective Items process. In other words, if a manager runs the process multiple times on the same business objective document and section type, only the information from the most recent process run is displayed on this page.

Select a row to view the details of the corresponding process run on the [Cascaded Items Page \(Read-only\)](#).

Cascaded Items Page (Read-only)

Use the Cascaded Items page (EPO_CASC_PARAM_FL) to review parameters and report results of selected cascade processes.

Navigation:

- Select a row on the [Review Manager Cascaded Items Page](#).
- Select the entry or link of an administrator cascaded item notification.

This example illustrates the fields and controls on the Cascaded Items page (read-only).

Cascaded Items

2023 Business Objectives Accounts Receivable

Accounts Receivable • Christelle Stevenson and Betty Locherty

The Cascade Items process was submitted on 2/2/2024 by Christelle Stevenson.

Objective

Objective Plan 2023 Business Objectives

Department Accounts Receivable

Section Type Customer Loyalty

Items

1 row

Cascade	Item
Yes	Demonstrate Customer Respect and Loyalty

Document

Document Type Performance Document

Section Type Goals & Objectives

Period Begin Date 07/01/2022

Period End Date 12/31/2023

Settings

Cascade Run Type Confirm Cascade Items [Cascade Item Report](#)

Cascade Levels One

Overwrite existing item? No

[Back to Top](#)

This page is the read-only version of the [Cascade Items Page](#). It displays the parameters used to run the Cascade Objective Items process being viewed, the list of items available in the section and whether they would be cascaded to target performance documents when the process actually occurs.

Creating Objectives Summary Data

This topic discusses how to create summary data for objectives.

The Create Objectives Summary Data process (EPO_OBJ_EXT) extracts data that the system uses to populate the Employees Aligned to Business Objectives chart. This chart is displayed when you select the **Aligned Items** icon on the [Update Objectives - <Department or Position> Page](#), or the *Alignment Analytics* action on the [Business Objectives Document Page](#).

To prepare the data needed prior to running the Create Objectives Summary Data process and viewing alignment information:

1. Create an business objective plan.
2. Create business objective documents for managers.

Align business objectives to business objectives in parent documents as appropriate. Publish business objective documents.
3. Create performance documents for users. The business objective plan created in step 1 needs to be referenced in the document type that is associated with the template of the performance documents.
4. Add business objectives to the performance documents either automatically using the Cascading process, or manually. Be sure to add the alignment information when adding business objectives manually. Alignment information is populated automatically as part of the Cascading process.

See Also [Cascading Objective Items](#).

5. Run the Create Objective Summary process for the business objective plan created in step 1.

Data becomes available for viewing when you select to view the alignment information on the Employees Aligned to Business Objectives chart.

See [Employees Aligned to Organizational Objectives Page](#).

Page Used to Create Objective Summary Data

<i>Page Name</i>	<i>Definition Name</i>	<i>Usage</i>
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 Performance Management 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**

This example illustrates the fields and controls on the Create Objectives Summary Data page.

Create Objectives Summary Data

Run Control ID

PS

Report Manager

Process Monitor

Run

Objective Plan

2023

Q

2023 Business Objectives

Set ID

Q

Select the objective plan and set ID (this field appears after an objective plan is specified) 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
<u>Identify Business Objective Nodes - Select Objective Plan Page</u>	EPO_PLAN_SELECT	Select the objective plan for which you want to identify nodes.
<u>Identify Business Objective Nodes Page</u>	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

This example illustrates the fields and controls on the Identify Business Objective Nodes - Select Objective Plan page.

Identify Objective Nodes		
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
2016 Business Objectives	07/01/2015	12/31/2016
2023 Business Objectives	07/01/2022	12/31/2023

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.

This example illustrates the fields and controls on the Identify Business Objective Nodes page.

Identify Business Objective Nodes

Enter search criteria to find the Departments that will have Business Objectives and then select Search.

Objective Plan

2023

2023 Business Objectives

Search Criteria

Set ID

SHARE

Department

13110

Search

Select the checkbox to indicate that the department will have business objectives.

Target Department

Select	Department	Description	Manager Name	Drill Up	View Chart
☒	13110	Corporate Accounting	Rosanna Channing	Drill Up	

Select any children that will also have business objectives.

Direct Reports

<

>

1-2 of 2

<

>

Select	Department	Description	Manager Name	Drill Down
☒	13111	Accounts Payable	Edmund Donahue	Drill Down
☒	13112	Accounts Receivable	Christelle Stevenson	Drill Down

Select All

Deselect All

Save

Cancel

Review Plan Nodes

Field or Control	Description
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.

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<i>Field or Control</i>	<i>Description</i>
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.

Related Links

[Understanding Fluid Business Objectives](#)

Restarting Objective Batch Processes

This topic discusses how to restart an objective batch process.

Page Used to Restart Batch Processes

<i>Page Name</i>	<i>Definition Name</i>	<i>Usage</i>
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 > Rerun Objective Batch Process > Restart Batch Processes

This example illustrates the fields and controls on the Restart Batch Processes page.

Rerun Objective Batch Process		
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

<i>Page Name</i>	<i>Definition Name</i>	<i>Usage</i>
<u>Missing Documents Page</u>	RUNCTL_EP_RPT	Generate reports for missing documents.
<u>Late Documents Page</u>	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” (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

This example illustrates the fields and controls on the Missing Documents page.

Missing Documents

Run Control ID PS

Report Manager Process Monitor Run

Language English

Report Request Parameter(s)

*Group As Of Date02/07/2024

Group ID

Document Type

To Date

From Date

Period Basis

Period Begin Date

Period End Date

Due Date

Field or Control	Description
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 <i>Period End Date</i> , the report only selects documents whose period end date falls between those dates.

Field or Control	Description
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

This example illustrates the fields and controls on the Late Documents page.

Late Documents

Run Control ID PS

Report Manager Process Monitor Run

Language English

Report Request Parameter(s)

*Group As Of Date 02/07/2024

Group ID

Document Type

Field or Control	Description
Language	Select the language in which you want to generate the report.

<i>Field or Control</i>	<i>Description</i>
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](#)

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:

- View Rating 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 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 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.

(Classic) Viewing Historical Documents

This topic discusses how to access historical documents in Classic Plus mode.

Note: A fluid version of ePerformance is now available to support employee performance reviews. For more information, see [Understanding Fluid ePerformance](#).

Pages Used to View Historical Documents

<i>Page Name</i>	<i>Definition Name</i>	<i>Usage</i>
<Performance or Development> Document History Page	EP_APPR_SELECT	Access completed documents for employees that you manage or for yourself.

Page Name	Definition Name	Usage
My Historical Evaluations for Others Page	EP_APPR_OTH_SELECT	Access completed documents for multi-participant evaluations in which you participated. See <Performance or Development> Document History Page

<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 Performance Docs > Performance Document History**
- **Manager Self Service > Performance Management > Development Documents > Historical Development Docs > Development Document History**
- **Self Service > Performance Management > My Performance Documents > Historical Performance Docs > Performance Document History**
- **Self Service > Performance Management > My Development Documents > Historical Development Docs > Development Document History**
- **Self Service > Performance Management > Other's Performance Documents > Performance History for Others > My Historical Evaluations for Others**
- **Self Service > Performance Management > Other's Development Documents > Development History for Others > My Historical Evaluations for Others**

Note: These pages are all similar in appearance and usage; only the Performance Document History page is detailed here.

This example illustrates the fields and controls on the <Performance or Development> Document History page.

Performance Document History

Listed below are the completed and canceled documents for which you are the Manager. You can access a document by selecting the "Employee" hyperlink.

Filter Criteria

First Name

Last Name

Document Type

Document Status

Period Between

Filter

Clear

Performance Documents

Personalize | Find |

First 1-33 of 33 Last

Name	Document Type	Document Status	Period Begin	Period End	Job Title	Rating
Mei Lee	Performance Document	Completed	01/01/2007	12/31/2007	Analyst-Financial	3-Good
Shawn Quilligan	Annual Review	Completed	01/01/2011	12/31/2011	Analyst-Financial	Needs Improvement
Mei Lee	Performance Document	Completed	01/01/2008	12/31/2008	Accountant	3-Good
Shawn Quilligan	Performance Document	Completed	01/01/2007	12/31/2007	Analyst-Financial	3-Good
Shawn Quilligan	Performance Document	Completed	01/01/2008	12/31/2008	Analyst-Financial	3-Good

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.

Field or Control	Description
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.

(Classic) Viewing Documents for Your Team

This topic lists the pages used to view documents for direct and indirect reports in Classic Plus mode.

Note: A fluid version of ePerformance is now available to support employee performance reviews. For more information, see [Understanding Fluid ePerformance](#).

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

<i>Page Name</i>	<i>Definition Name</i>	<i>Usage</i>
View-Only Documents Page (Employee Selection)	HR_DR_DIRECTREPORT	Select an employee whose documents you want to view. The employee selection function on this page is identical to the Create <Performance or Development> Documents - Employee Selection Criteria Page.
View <Performance or Development> Documents Page	EP_APPR_SELECT	View the selected employee document in WorkCenter. See Current <Performance or Development> Documents Page or <Performance or Development> Documents Page.

Note: This task is available to administrators (from the Navigator menu) and managers (both from the Fluid navigation collection and from the Navigator menu). When accessed from the Navigator, do not add this task page to a Fluid navigation collection or the NavBar from the Actions menu. Refer to the [View-Only Documents - Document List Page \(Team Performance\)](#) topic for more information about performing this task from the Fluid navigation collection.

Related Links

(Classic) [Accessing Documents](#)

(Classic) Viewing Approval Status

This topic discusses how to view approval status in Classic Plus mode.

Note: A fluid version of ePerformance is now available to support employee performance reviews. For more information, see [Understanding Fluid ePerformance](#).

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

[\(Classic\) 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

This example illustrates the fields and controls on the View Approval Status Summary page.

View Approval Status Summary

Enter some Selection Criteria and then select Search to find employees for which you are a participant in the approval process. Then, select a hyperlink to see details about the status of each transaction.

Filter Criteria

First Name

Manager First Name

Document Type

Period Between -

Last Name

Last Name

Approval Status

Search

Clear

Performance Document

Personalize | Find |

First 1 of 1 Last

Name	Begin Date	End Date	Document Status	Approval Status	Submitted By	Document Type
Christelle Stevenson	01/01/2002	12/31/2002	Completed	Approved	Betty Locherty	Annual Review

Field or Control	Description
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.
- Select the **Notifications** button from the page banner. From the Notifications panel - Alerts section, select a performance request entry that is pending approval.

This example illustrates the fields and controls on the View Approval Status Detail page.

View Approval Status Detail

Review the status of each transaction request.

Christelle Stevenson

Empl ID KU0020

Performance Document

Doc Type Annual Review

Author Betty Locherty

Period Begin Date 01/01/2002

Period End Date 12/31/2002

Rating Meets Expectations

Performance Document Details

Evaluation Approval Chain

Review Employee: **Approved**

Evaluation Approval Chain

Approved

ESGBPI (KU0007)

ePerformance HR Administrator

06/02/14 - 11:24 AM

Approval Summary

Field or Control	Description
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

<i>Page Name</i>	<i>Definition Name</i>	<i>Usage</i>
<u>Setup Rating Distribution Page</u>	EP_DESIRED_DIST	Define the parameters for generating the Rating Distribution Summary report for a selected group of employees.
<u>Create Summary Data Page</u>	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 groups using Group Build.

Before defining the parameters for the desired rating distribution, define groups to generate ratings distribution summary and document status summary reports.

- Define rating distribution parameters.

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” (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 > Set Up Rating Distribution > Setup Rating Distribution

This example illustrates the fields and controls on the Setup Rating Distribution page.

Setup Rating Distribution

Group ID H0CC01 Employees in Dept H0PM8

Review Rating Model

*Effective Date 02/07/2024

Status A

Total Pct 0.00

*Description

Short Description

*Document Type

*Rating Model

*Calc Method

Desired Rating Distribution

From Points 0 To Points 0 Desired Distribution 0.00

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.

Field or Control	Description
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: <i>Average</i> , <i>Revw Band</i> (review band), or <i>Sum</i> (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:

Field or Control	Description
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 Review 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 Document Summary Data

This example illustrates the fields and controls on the Create Summary Data page.

Create Summary Data

Run Control IDPS

Report ManagerProcess Monitor

Run

Report Request Parameter(s)

*Group As Of Date02/07/2024

Document Type

From Date

To Date

Period Basis

☒ Period Begin Date

☐ Period End Date

Group Id

1-1 of 1

View All

*Group ID

Description

+

-

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.

Field or Control	Description
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.

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Period Basis

<i>Field or Control</i>	<i>Description</i>
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

<i>Field or Control</i>	<i>Description</i>
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

<i>Page Name</i>	<i>Definition Name</i>	<i>Usage</i>
<u>View Rating Summary Page</u>	EP_DISTRIB_SUM	View the preliminary, actual, and desired rating distributions for a group of employees and document type.

Page Name	Definition Name	Usage
<u>Rating Distribution Detail Page</u>	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 ratings distribution summary reports include preliminary ratings, you as the administrator should ensure that all preliminary ratings are entered by the managers.

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.

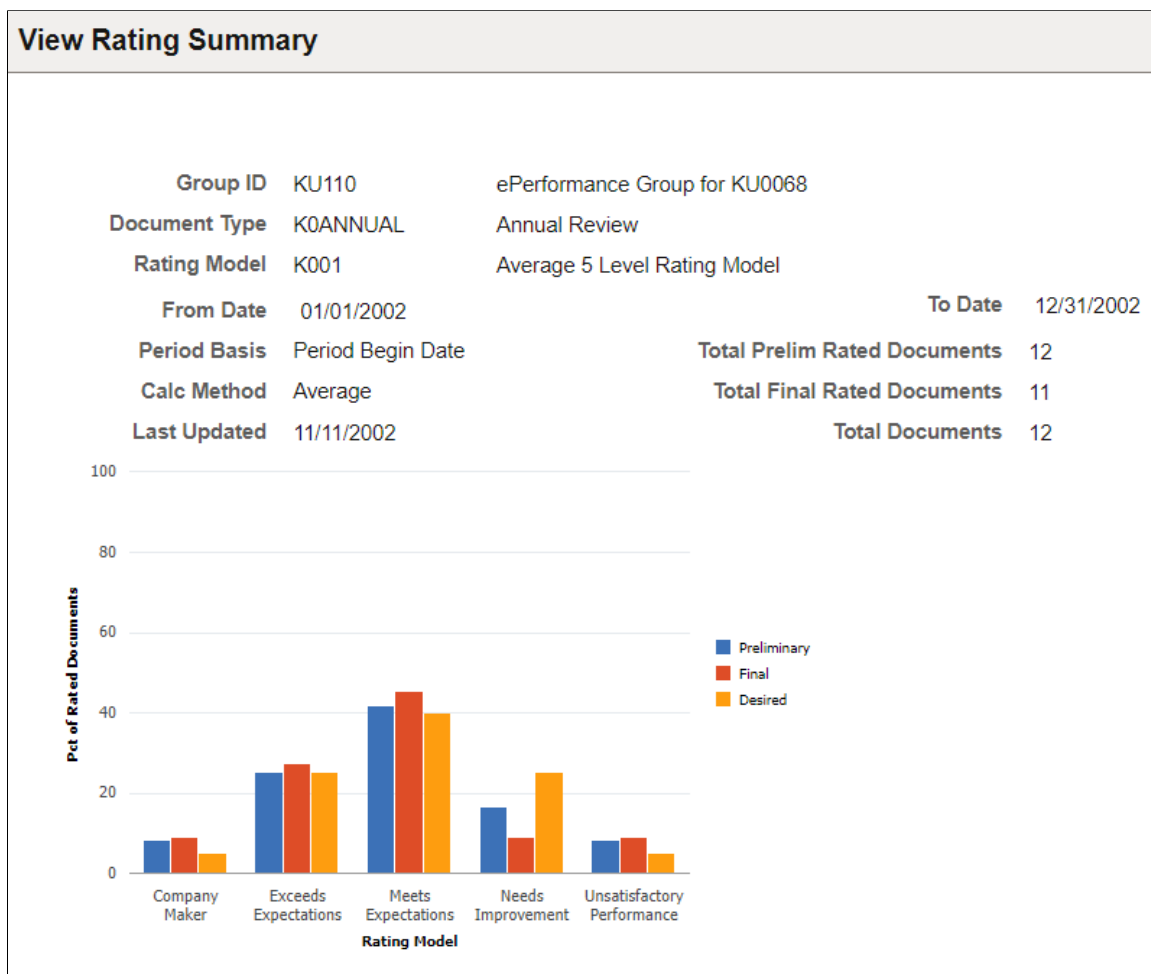
View Rating Summary Page

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

This example illustrates the fields and controls on the View Rating Summary page.



Field or Control	Description
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: <i>Summary</i>, <i>Average</i>, and <i>Review Band</i>. 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.

Field or Control	Description
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 section of the Setup Rating Distribution page.

Click a preliminary or actual bar to access the [Rating Distribution Detail Page](#), where you can view detailed information for the selected rating category or point spread. Selecting a desired bar does not take you to that page.

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.

This example illustrates the fields and controls on the Rating Distribution Detail page.

Rating Distribution Detail X

Group ID

KU110

ePerformance Group for KU0068

Document Type

Annual Review

Rating Type

Final

Distribution Group

Exceeds Expectations

Calculation Method

Average

Rating Model

Average 5 Level Rating Model

Distribution Detail

Q

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1-3 of 3
>
|>

Empl ID	Empl Record	Name	Period Begin Date	Period End Date	Document Status	Approval Status	Preliminary Rating	Final Rating
KU0070	0	Michelle Kelly	01/01/2002	12/31/2002	CO	NREQ	Exceeds Expectations	Exceeds Expectations
KU0071	0	Tina Palisco	01/01/2002	12/31/2002	RH	NREQ	Exceeds Expectations	Exceeds Expectations
KU0076	0	Mei Lee	01/01/2002	12/31/2002	CO	NREQ	Meets Expectations	Exceeds Expectations

Return

This page lists detailed information for the employees within the rating category or point spread that you selected on the [View Rating Summary Page](#).

Field or Control	Description
Calculation Method	The calculation method that is used to calculate the overall ratings. Values are <i>Average</i> , <i>Review Band</i> , and <i>Summation</i> .
Approval Status	The code for the approval status: <i>NREQ</i>: Not required <i>OPEN</i>: Not submitted <i>SUBM</i>: Submitted <i>APRV</i>: Approved <i>DENY</i>: 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.

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Pages Used to View Document Status Summaries

Page Name	Definition Name	Usage
<u>View Status Summary Page</u>	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.
<u>View Status Summary Page</u>	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.
<u>Document Status Detail Page</u>	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.

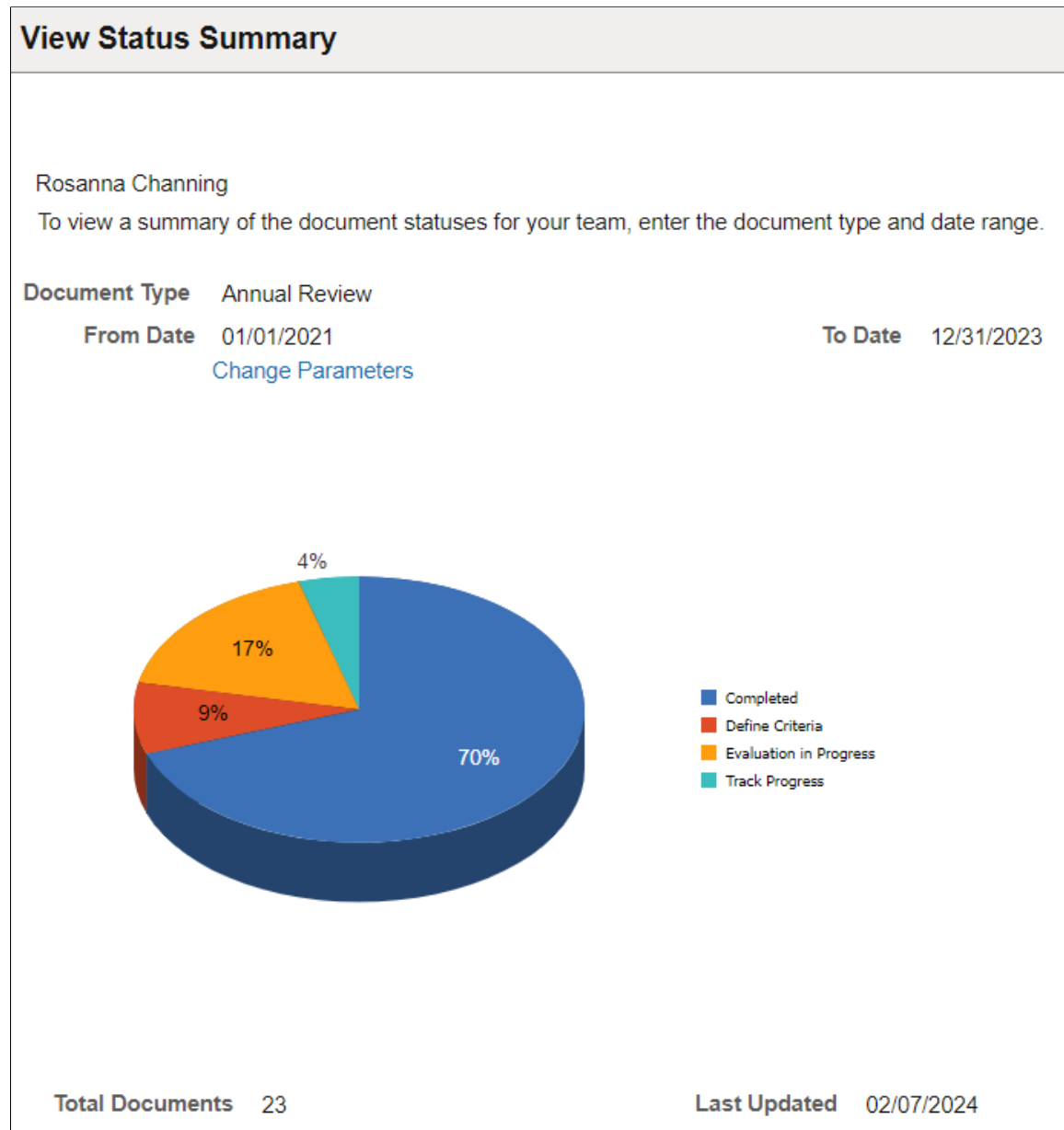
View Status Summary Page

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.

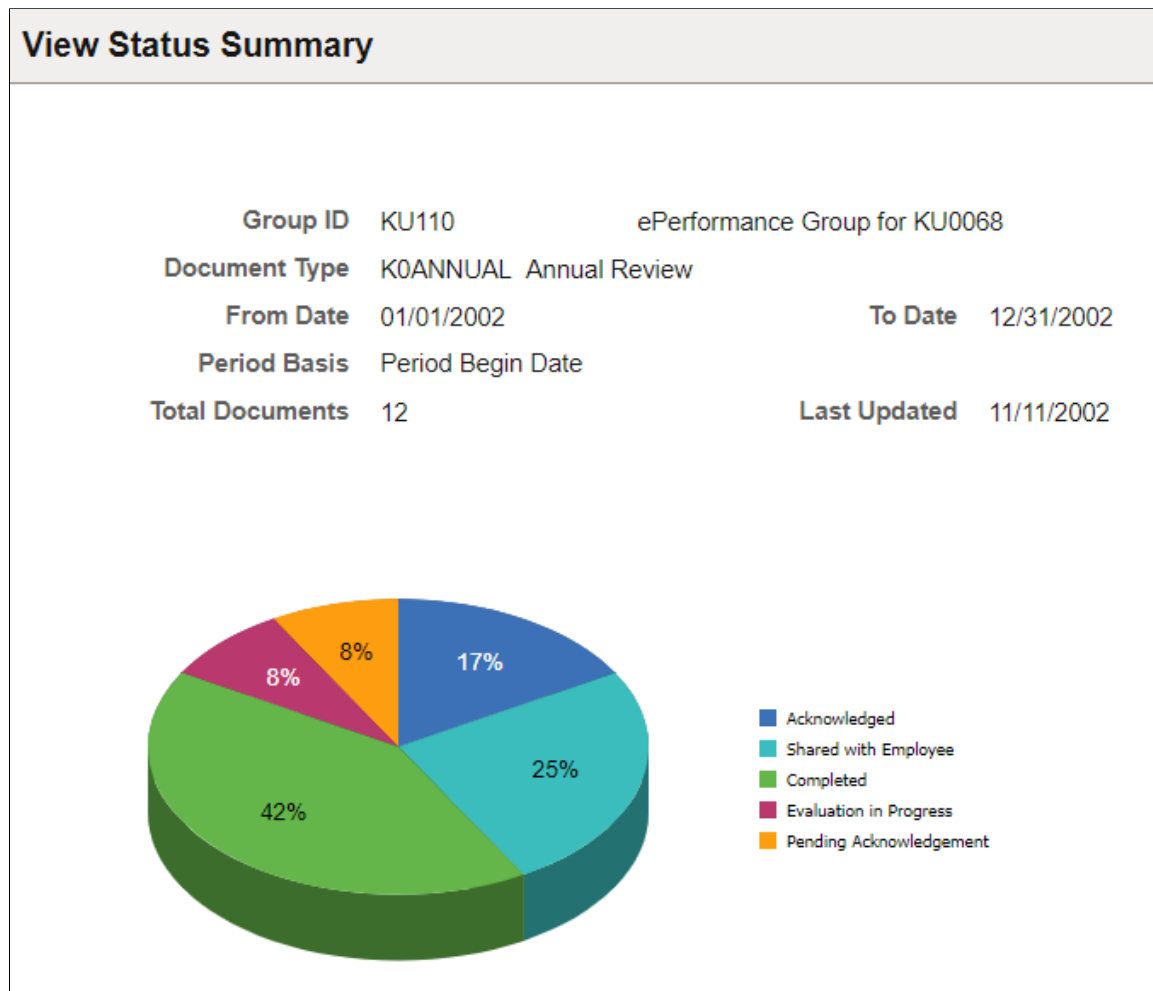
Navigation:

- (Manager) **Manager Self Service > Performance Management > View Document Status Summary > View Status Summary**
- (Administrator) **Workforce Development > Performance Management > Reports > View Document Status Summary > View Status Summary**

This example illustrates the fields and controls on the View Status Summary page for managers.



This example illustrates the fields and controls on the View Status Summary page for administrators.



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 Document 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.

Field or Control	Description
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 [Document Status Detail Page](#).

Related Links

[Document Statuses during Review and Approval](#)

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.

This example illustrates the fields and controls on the Document Status Detail page for managers.

Document Status Detail

Rosanna Channing

Document Type

K0ANNUAL

Annual Review

Document Status

Define Criteria

Status Detail

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<

1-2 of 2

>

>

View All

Empl ID	Employee	Begin Date	End Date
KU0020	Christelle Stevenson	01/01/2023	12/31/2023
KU0102	Edmund Donahue	01/01/2023	12/31/2023

Return

This example illustrates the fields and controls on the Document Status Detail page for administrators.

Document Status Detail

Group ID

KU110

ePerformance Group for KU0068

Document Type

K0ANNUAL

Annual Review

Document Status

Shared with Employee

Status Detail

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1-3 of 3

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>

Empl ID	Empl Record	Name	Period Begin Date	Period End Date	Approval Status
KU0079	0	Russell Parker	01/01/2002	12/31/2002	Not Required
KU0080	0	Megumi Sakata	01/01/2002	12/31/2002	Not Required
KU0084	0	Nancy Reed	01/01/2002	12/31/2002	Not Required

Return

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.

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Field or Control	Description
Approval Status	The code for the approval status: • <i>NREQ</i>: Not required • <i>OPEN</i>: Not submitted • <i>SUBM</i>: Submitted • <i>APRV</i>: Approved • <i>DENY</i>: 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 > Debug Rating Calculation > ePerformance Debug/Trace Log

This example illustrates the fields and controls on the ePerformance Debug/Trace Log page.

The screenshot shows the 'ePerformance Debug/Trace Log' page. At the top, it displays document information: Document ID 680, Role Manager, Empl ID KU0059, and the name Vicki Zinn. There is a 'Log Entry Type' dropdown menu. Below this are links for 'Collapse All', 'Expand All', 'Send to PeopleSoft', and 'Printable Version'. A 'Data' section contains a table with columns: Seq, Function, Section, Item, and Trace/Debug Message. The table has three rows of data. Above the table are tabs for 'Step Info' and 'Step Detail', and a 'Personalize' link. Navigation controls for the table include 'Find', 'View All', and pagination 'First 1-3 of 3 Last'.

Seq	Function	Section	Item	Trace/Debug Message
2	CalcReview()			Calc All Ratings button selected - Begin at 14.34.55.000000. (229)
3	CalcReview()			Template rule indicates that ratings are not to be calculated for this review. (235)
47	CalcReview()			Calc All Ratings button selected - End at %1 (236)

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.

Field or Control	Description
Log Entry Type	Select a log entry type to filter the output. Options are: • <i>Trace:</i> Only those entries that show the steps performed in the calculation appear. • <i>Informational:</i> 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. • <i>Error:</i> Errors appear in red and generally indicate a setup problem. • <i>Warning.</i>
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” (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.

This example illustrates the fields and controls on the ePerformance Debug/Trace Log page (printable version).

ePerformance Debug/Trace Log

Document ID680

RoleManager

Empl IDKU0059

Log Entry Type

Vicki Zinn

Return to Normal View

Data										Personalize	Find	121		First	1-3 of 3	Last
Seq		Function	Section	Item	Rating Model	Calc Method	Review Rating	Numeric Rating	Review Points	Trace/Debug Message						
2		CalcReview()								Calc All Ratings button selected - Begin at 14.34.55.000000. (229)						
3	+	CalcReview()								Template rule indicates that ratings are not to be calculated for this review. (235)						
47		CalcReview()			K001	Average				Calc All Ratings button selected - End at %1 (236)						

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 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:

<i>Description</i>	<i>Archiving Record</i>	<i>History Record</i>
Document Header	EP_APPR	EP_APPR_HST
Document Item - Baseline	EP_APPR_B_ITEM	EP_A_B_ITEM_HST

Description	Archiving Record	History Record
Document Role - Baseline	EP_APPR_B_ROLE	EP_A_B_ROLE_HST
Document Section - Baseline	EP_APPR_B_SEC	EP_A_B_SEC_HST
Document Sub-Item - Baseline	EP_APPR_B_SUB	EP_A_B_SUB_HST
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**).

Delivered Workflow for ePerformance

Delivered Workflow for ePerformance

This section discusses ePerformance workflow. The workflows are listed alphabetically by workflow name.

Related Links

[Modifying Page and Notification Texts](#)

ePerformance Notification Events

This section discusses the ePerformance notification workflow.

Description

<i>ePerformance Notification Event</i>	<i>Description</i>
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

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:

<i>Role</i>	<i>Description</i>
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 document lists from the navigation collection of the Performance tile in Fluid Employee Self Service. See Also Accessing Performance Documents as Employees Using Fluid Navigation Collection. Note: (Fluid ePerformance) The <i>ePerformance Employee Fluid</i> role is still required for employees who use the Fluid ePerformance functionality.

Role	Description
Fluid Dashboard - ESS ePerf	This role provides employees access to these document lists from the Performance tile > <u>Performance Dashboard</u> in Fluid Employee Self Service:
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. Users 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 all document lists from the navigation collection of the Team Performance tile, and the chart on the Team Performance Status tile in Fluid Manager Self Service. See Also <u>Accessing Performance Documents as Managers Using Fluid Navigation Collection</u>. Note: (Fluid ePerformance) The <i>ePerformance Manager Fluid</i> role is still required for managers who use the Fluid ePerformance functionality.
Fluid Dashboard - MSS ePerf	This role provides managers access to the Team Performance tile > <u>Team Performance Dashboard</u> in Fluid Manager Self Service.

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:

<i>Permission List</i>	<i>Description</i>	<i>Role</i>
HCCPSS1350	ePerformance Employee	ePerformance Employee
HCCPSS1360	ePerformance Employee Fluid	ePerformance Employee Fluid
HCCPSS1370	ePerformance ESS Dashboard	ePerformance ESS Dashboard
HCCPSS2150	ePerformance Manager	ePerformance Manager
HCCPSS2160	ePerformance Manager Fluid	ePerformance Manager Fluid
HCCPSS2170	ePerformance MSS Dashboard	ePerformance MSS Dashboard

This table lists the delivered permission lists for ePerformance component interfaces:

<i>Permission List</i>	<i>Description</i>
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.

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:

Field or Control	Description
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:

Field or Control	Description
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:

Field or Control	Description
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:

Field or Control	Description
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:

Field or Control	Description
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:

Field or Control	Description
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:

- Navigate to **PeopleTools > Integration Broker > Service Operations Monitor > Administration > Domain Status**.
- 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:

<i>Field or Control</i>	<i>Description</i>
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.

This example displays the Structure and Content page.

Root > [Workforce Development](#) > [Performance Management](#) > ELM Learning

Structure and Content

* Click the folder label to view the child folders and content references for that folder
 * Click the "Edit" link to edit the folder definition

▼ **Folders** [Personalize](#) | [Find](#) | [View All](#) | | First 1 of 1 Last

[Add Folder](#)

* Click the "Edit" link to edit the content reference definition

▼ Content References		Personalize Find View All First 1-10 of 10 Last				
Link	Node Name	Label	Edit	Sequence number	Create Link	Number of links
	ELM	Search Catalog	Edit	10	Create Link	0
	ELM	Search Catalog	Edit	20	Create Link	1
	ELM	View Supplemental Learning	Edit	30	Create Link	0
	ELM	Update Ad-hoc Enrollments	Edit	40	Create Link	0
	ELM	Manager Program Details	Edit	50	Create Link	0
	ELM	Learner Program Details	Edit	60	Create Link	0
	ELM	Activity Progress	Edit	70	Create Link	0
	ELM	Enroll Learners	Edit	80	Create Link	0
	ELM	Learning Search	Edit	90	Create Link	0
	ELM	Learning Search	Edit	100	Create Link	0

[Add Content Reference](#) [Add Content Reference Link](#)

(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_SYNC_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_SYNC_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.

- a. Navigate to **Set Up HCM > Common Definitions > Direct Reports for Managers > Direct Reports Interface**.
- 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*.

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: SQL 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 Employees with 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

Report ID and Report Name	Description	Navigation	Run Control Page
HEP002 Employees with 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
EP_CASCADE Cascade Item Report	Create a list of items from business objective pages (or documents) to be cascaded to selected performance documents.	(Administrator) Workforce Development > Performance Management > Business Objectives > Cascade Objective Items > Cascade Objective Items (Manager) Select the <i>Preview Item Report</i> or <i>Cascade Item Report</i> link on the <u>Cascade Items Page</u>.	EPO_SEL_OBJ