Oracle Fusion Cloud Talent Management

How do I administer performance documents in the Redwood experience?

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1 HR and Manager Administative Tasks

Overview

As an HR specialist, administration actions help you simplify and speed up the performance review process. You can take action for any worker included in your security profile, while managers manage documents for their own teams.

You'll find administration actions on these pages:

- Performance Documents
- Participant Feedback
- Performance Eligibility
- Mass Actions for Performance Documents

Performance Administration Actions

The available actions for HR specialists and managers in performance document management are listed in the following table.

Action	HR Specialist	Manager	Description
Create Standard Performance Documents	Yes	No	HR specialists can create standard performance documents for scheduled evaluations, one for each worker assignment.
Create Anytime Performance Documents	Yes	Yes	Create instant evaluations for projects, improvement plans, or other occasions. Multiple anytime documents can be created for a single assignment.
Bypass Employee Self-Evaluation	Yes	Yes	Sets the employee self-evaluation to complete, and lets you continue with your evaluation.
Send Notification	Yes	No	Send reminders for upcoming events and tasks throughout the performance management process.
Transfer Performance Documents	Yes	Yes	Transfer a worker's performance documents to a new manager. HR specialists can do this for multiple documents at once.
Change Task Due Date	Yes	No	Edit due dates on tasks within standard documents. For anytime

Action	HR Specialist	Manager	Description
			documents, add due dates when creating them.
Change Feedback Due Date	Yes	Yes	Edit deadlines for providing feedback on performance documents.
Change Current Task	Yes	No	Move documents forward or backward between workflow tasks to keep review progress on track.
Cancel Performance Documents	Yes	Yes	Cancel documents to stop their workflow and remove profile updates linked to them. HR specialists can cancel in bulk.
Delete Performance Documents	Yes	Yes	Permanently delete canceled performance documents. Bulk deletes supported for HR specialists.
Complete Performance Documents	Yes	Yes	Mark documents as Completed even if all tasks are not finished, ending the document process.
Manage Performance Documents for Inactive Assignments	Yes	Yes	Create or open a performance document for a worker whose assignment is inactive.
Monitor Late Tasks in Performance Documents	Yes	No	Track overdue tasks, adjust due dates, and send reminders to keep evaluations on time.
Reopen Performance Documents	Yes	Yes	Unlock documents marked as Completed, allowing managers or workers to resume reviews.
Restore Performance Documents	Yes	Yes	Bring back a canceled document to its last status; related profile updates are restored as well.
Return Self-Evaluation to Employee	Yes	Yes	Return documents so that workers can continue to work on their self-evaluations.

Create Standard Performance Documents

HR specialists, managers (including matrix managers), and workers create anytime performance documents when they want to evaluate projects, performance improvement plans, or on any other occasion that needs a formal evaluation.

Create for Specific Workers

Follow these steps:

1. Go to **My Client Groups > Performance > Performance Documents**.

2. Search for eligible workers by specifying a review period and performance document name. Then, type the name of a worker, manager, or department to start the search.
3. Click **Create Document**.
4. Select the workers for whom you want to create performance documents.
5. Click **Continue**.
6. (Optional) Change the dates, if required. These must be within the document period start and end dates defined in the performance template.
7. (Optional) Select the manager of the performance document. The manager must have access to the worker to manage the document.
8. (Optional) Select the manager of the performance document. The manager must have access to the worker to manage the document.
9. Click **Submit**.

Create for a Group of Workers

Follow these steps:

1. Go to **My Client Groups > Performance > Process Mass Actions for Performance Documents**.
2. Click **Add**, and select **Create Performance Documents**.
3. Select the review period for which you want to create the performance documents.
4. Select a name from the preconfigured list of performance documents.
5. (Optional) Provide a reason for creating the performance documents.
6. (Optional) Select the business unit, department, manager, or worker for whom you want to create the performance documents.
7. Click **Submit**.

Create Anytime Performance Documents

HR specialists, managers, and workers can create anytime performance documents only for people to whom they have data security access.

To create anytime performance documents using smart navigation actions or quick actions, you must have the ORA_HRA_CREATE_ANYTIME_PERFORMANCE_DOCUMENT privilege.

Depending on your role, access the page where you create anytime documents as listed in the following table. All of the roles can create anytime documents using quick actions too.

Who	How
Employee	1. Go to **Me > Career and Performance > Performance**. 2. Select the review period for which an anytime performance document template exists 3. Scroll to the Anytime Documents section and click **Add**.
Manager	1. Go to **My Team > Performance Overview**. 2. Click the Actions menu for an employee and click **Add Anytime Document**.

Who	How
	3. Specify the review period, anytime performance document name, and manager, the start and end date, and description. 4. Click **Submit**.
HR Specialist	1. Go to **My Client Groups > Performance > Performance Documents**. 2. Click **Create Document**. 3. Search for the employees for whom you want to create the documents by specifying the review period, anytime performance document name, and manager, department, or employee name. 4. Select the employees and click **Continue** .

Bypass Employee Self-Evaluation

As a manager or HR specialist, if you bypass the worker's self-evaluation task, you can view any ratings, comments, and questionnaire responses already entered by the worker.

You can use the **Bypass Self-Evaluation** action on the Evaluate Performance page. While managers can bypass the worker's self-evaluation task, they can't change the status of other tasks unless they complete them. HR specialist bypasses worker self-evaluations using the Change Current Task action.

Send Notifications for Performance Documents

As an HR specialist, you can send notifications to employees or managers to remind them of upcoming events and tasks related to performance documents.

Notifications are delivered by email and appear on the recipient's worklist.

1. Go to **My Client Groups > Performance > Performance Documents**.
2. In the Performance Documents page, click **Send Performance Notifications**.
3. Select the recipients and the review period.
4. Select the performance document. Eligible employees will be included automatically.
5. If necessary, filter the recipient list using the hire date range. This allows you to notify only employees hired within a specific time frame.
6. Edit the notification details as needed. You can format the message.

   By default, notifications are sent to the first 500 recipients. To increase this limit, your administrator can create the HRA_SEND_EMAIL_POPULATION_LIMIT profile option and set the desired number of recipients. A value of -1 sends notifications to all eligible recipients.

Transfer Performance Documents

HR specialists and managers can transfer worker performance documents from one manager to another.

This is useful when an employee changes managers or when there's a management transition. When a worker has multiple performance documents, you can transfer some or all documents to the same or different managers as needed.

If you’re an HR specialist , you can transfer performance documents, regardless of their status, as long as you have access to the worker’s records. You can’t transfer your own performance documents.

1. Go to **My Client Groups > Performance > Performance Documents**
2. Search for the performance documents to transfer.
3. Select the performance documents and click **Transfer to New Manager**.
4. Select the new manager’s name.
5. Select a reason for the transfer.
6. Click **Submit**.

If you're a manager, you can transfer one or more performance documents at a time. Completed or cancelled performance documents can’t be transferred.

1. Go to **My Team > Performance**
2. Find the employees whose document you want to transfer.
3. Select the documents, then click **Actions > Transfer**.
4. Enter and select the new manager’s name.
5. Click **Save and Close**.

Select Participant as New Manager

Both HR specialists and managers can transfer performance documents to a participant who previously provided feedback. They can also make a current participant the new performance document manager. When they do this, they can't send any more participant feedback requests to that manager for the same performance document. However, the previous manager can become a participant for any new participant feedback requests.

When a participant becomes the new performance document manager, the feedback that the participant provided earlier is still available in the performance document. If they have any open participant feedback requests from before for the same performance document, that request becomes locked and they can't complete it.

Impact of Transferring Performance Documents

After you transfer a performance document this is what happens:

- The previous performance document manager can't view the performance document unless they still have access to the employee. If they still have access to the employee, they can see a read-only version of the document.
- The new manager can view the performance document and all the data in it.
- Performance ratings and comments from the previous manager and participant feedback remain intact in the performance document.
- The new manager can edit the performance document, including any comments and ratings provided by the previous manager.
- The worker, new manager, and feedback participants can continue the evaluation by performing the next available task in the process flow.
- If notifications are enabled, the previous manager, the new manager, and the employee receive notifications when an HR specialist transfers the document.

Change Due Dates in Performance Documents

As an HR specialist, you can update the due date for any task in a performance document.

Here’s how you can do it by number of performance documents:

1. Go to **My Client Groups > Performance > Performance Documents**.
2. Select the performance documents you want to update.
3. Click **Change Due Date**.
4. Enter the new due date for the tasks you want to change.
5. (Optional), specify a reason for changing the due date.
6. Preview the changes and process them later, or submit the updates right away.

Here's how you can do it by population:

1. Click the **Mass Action Processes for Performance Documents** task.
2. Click **Actions > Change Task Due Dates** .
3. Choose the population of employees.
4. (Optional), specify a reason for the change. Use the ORA_HRA_MASS_UPD_TASK_REASON lookup to choose a reason for the due date change.
5. Enter the new due dates for the relevant tasks.
6. Review your selections, then submit the changes for processing.

Keep the following points in mind:

- You can only change due dates for tasks that aren’t completed or canceled.
- You can search for any performance documents and employees you have access to.
- You can’t update your own performance documents.

Complete Performance Documents

HR specialists and managers can mark a performance document as Completed even if all tasks aren’t finished. This is useful if, for example, an employee or manager can’t acknowledge the document or leaves the organization.

If you're an HR specialist, you can only complete documents that aren’t already completed or canceled, and only for employees you have access to (not your own documents). Here are the steps you need to do:

1. Go to **My Client Groups > Performance > Performance Documents**.
2. Search for and select the documents you want to complete.
3. Click **Complete**.
4. (Optional) Select a reason for completion. Organizations can add custom reasons with the ORA_HRA_MASS_UPD_TASK_REASON profile option in the Performance Lookups task.
5. Click **Submit**.

If you're a manager, you can complete documents you manage using these steps:

1. Go to **My Team > Performance > Evaluate Performance** page.
2. Select the relevant performance document and then click **Complete** from the row actions.
3. If notifications are enabled, this is what happens:

- When HR specialists complete employees performance documents, both employees and their managers are notified.
- When a manager completes a performance document, the employee is notified.

When you complete a performance document, the existing content, ratings, and comments are updated in the employee profile based on the configuration in the performance template. The document can still be reopened later, from the point at which it was completed.

Move Performance Document Tasks

As an HR specialist, you can adjust the progress of tasks in performance documents. Move tasks forward to bypass steps or move them back to redo completed actions. You can apply these changes for one or multiple employees.

Move a Task Forward

1. Go to **My Client Groups > Performance > Performance Documents**.
2. Select one or more performance documents that are all on the same current task.
3. Click **Move Task Forward**.
4. Choose a reason for moving forward. Only the latest reason is saved for reporting. The reason you select is used in reports, but isn't visible on the Performance Management pages.
5. Confirm your action. The skipped task is now marked as Bypassed for both employee and manager.

Move a Task Back

As an HR specialist, return to a previously completed task to revisit or correct information.

1. Open the Performance Documents page.
2. Select all documents to be moved back, they must be on the same current task.
3. Click **Move Task Back**.
4. Select the completed task (or subtask, if available) to return to. For example, the Review Meeting task can have two subtasks: Indicate Review Meeting Held performed by the manager, and Acknowledge Review Meeting Held performed by the employee. You can move the Review Meeting task back to either subtask.
5. Choose a reason for the move. Only the latest reason appears on reports.
6. All subsequent tasks are reset to Not started and the tasks must be completed again. If the tasks were previously completed, any previous entries are preserved.

Tasks with Restrictions

- All tasks can be moved, except **Manage Participant Feedback**.
- The **Manage Participant Feedback** task can reopen if you move back to an earlier evaluation step in the process flow. New feedback requests can be sent, but existing feedback remains.
- Moving an Approval task forward marks it as **Bypassed**. But the worklist and email notifications are still delivered as if the task was completed by the approver.

Cancel Performance Documents

HR specialists and managers can cancel performance documents to remove them from the performance management process.

1. If you're an HR specialist, go to **My Client Groups > Performance > Performance Documents**.
2. Search for and select the relevant performance documents and click **Cancel**.
3. (Optional), select a reason for cancellation. Organizations can add custom reasons to the selection list using the ORA_HRA_MASS_UPD_TASK_REASON profile option in the Performance Lookups task under Setup and Maintenance.

Note: HR specialists can use HCM Data Loader to cancel performance documents for multiple employees at once.

1. If you're a manager, go to **My Team > Performance** or use the Performance tab on the employee’s person spotlight page.
2. Select a performance document and click **Cancel** from the row actions.

Which Documents You Can Cancel

You can cancel a performance document in any status except those already canceled. Managers can only cancel documents they manage and that are not marked as complete. HR specialists may search for and cancel documents for employees within their security access, but not for themselves. HR specialists can select and cancel multiple documents at the same time.

Impact of Canceling a Document

- Canceled documents aren't permanently deleted from the application.
- You must cancel a document before it can be deleted.
- Any changes to talent profile content (such as competency ratings) made through the performance document are reverted to their original state.
- If notifications are enabled, affected employees and managers are notified:
  - Employees and their manager receive a notification when HR cancels a document.
  - Employees are notified if their manager cancels their document.

Restoring or Reopening Canceled Documents

You can restore or reopen a performance document with a canceled status to resume the evaluation process. When reopened or restored, all content, ratings, and comments remain intact.

Reopen Performance Documents

HR specialists and managers can reopen performance documents, allowing managers or workers to continue the evaluation process.

- If you're an HR specialist, go to **My Client Groups > Performance Documents > Reopen** from the Actions menu.
- If you're a manager, go to **My Team > Performance > Return Self-Evaluation to Employee**.

Criteria to Reopen Performance Documents

- HR specialists can reopen documents if the manager evaluation status is Completed and the document status is Canceled or Completed.
- Managers can reopen documents if the manager evaluation status is Completed and the document status isn't In Progress, Canceled, or Completed.
- HR specialists can search for documents and workers within their security access, but not for themselves or their own documents.
- Managers can search for performance documents they manage.
- HR specialists may select and reopen multiple documents at once and can optionally provide a reopening reason.

When you reopen a performance document, here's what happens:

- If the document was canceled, it reopens at the point of cancellation.
- If the document was completed, the last task reopens. HR specialists can move the document to another task using the Update option in the Actions menu.
- The manager and worker are notified when an HR specialist reopens a document; if a manager reopens it, only the worker is notified.
- The completed document is removed from active approval queues.
- All previous data remains as it was when the performance document was canceled or completed.
- The worker’s profile reverts, excluding data from the previously completed document.

Restore Performance Documents

If a performance document that's been completed was canceled by mistake or for administrative reasons, both HR specialists and managers can restore it to its Completed status.

You can only restore performance documents if the current status is Canceled or if the document was in Completed status before cancellation.

If you're an HR specialist, you can search for and restore performance documents for employees within your security access, but not for yourself. You can also restore multiple documents at once.

1. Go to **My Client Groups > Performance > Performance Documents**.
2. Search for and select the canceled performance documents you want to restore.
3. In the Actions menu, click **Restore**.
4. (Optional) Select a reason for restoring the document. Organizations can add custom reasons through the ORA_HRA_MASS_UPD_TASK_REASON profile option in Performance Lookups under Setup and Maintenance.
5. Click **Submit**.

If you're a manager, you can restore canceled documents you manage.

1. Go to **My Team > Performance** or the Performance tab on the employee's person spotlight page.
2. Filter for performance documents with a status of Canceled.
3. In the Actions menu, click **Restore**.

When you restore a performance document:

- Any profile content, like ratings and comments, that's reverted due to cancellation is restored.
- If notifications are enabled, employees and their managers are informed:
  - If HR specialists restore a document, both the employee and manager get notified.
  - If a manager restores it, only the employee is notified.

Change Feedback Due Date

You can change the participant feedback due date if you're a worker, manager, or HR specialist. The steps depend on your role, and it's important to note that the feedback due date for participants isn't enforced.

If you're an HR specialist:

1. Go to **My Client Groups > Participant Feedback**.
2. Use the Change Due Date action after the results are displayed.
3. (Optional) Select a reason for the change. Organizations can add reasons by configuring the ORA_HRA_MASS_UPD_TASK_REASON profile option in Performance Lookups.

You can search for performance documents and workers in your security scope, but not your own documents.

If you're a worker or manager, you can change the due date by resending the participant feedback request, not simply by sending it again. You'll only be able to resend the request if these conditions are met:

- The participant feedback task is still open.
- The feedback request isn't locked or completed.
- The performance template's process flow allows you to request feedback (managers can always send or resend these requests).

To update the feedback due date:

1. If you're a worker, go to **Me > Career and Performance > Performance**.
2. If you're a manager, go to **My Team > Career and Performance > Evaluate Performance**

3. Select the relevant review period.
4. Find and select the performance document where you want to change the due date.
5. From the row actions, click **Manage Participant Feedback**.
6. Select the participant who'll get the new due date.
7. Click Actions and select **Resend Request**.
8. In Due Date, pick the new date.
9. (Optional) Enter a message for the participant.
10. Click **Submit**.

You can change the feedback due date for performance documents you manage in these conditions:

- The document includes the Manage Participant Feedback task.
- You or the manager have added participants.
- Participants haven't submitted feedback.
- Participants aren't locked out of feedback.

Participants can keep providing feedback after the due date, as long as the Manage Participant Feedback task hasn't been completed.

Delete Performance Documents

HR specialists and managers can permanently delete canceled performance documents. Once you delete a document, you can't restore its data.

If you're a HR specialist, you can delete canceled documents for employees within your security access, but not for yourself. You can also select and delete multiple documents at once.

1. Go to **My Client Groups > Performance > Performance Documents**.
2. Search for and select the canceled performance documents you want to delete.
3. In the Actions menu, click **Delete**.
4. (Optional) Select a reason for deletion. Organizations can add custom reasons using the ORA_HRA_MASS_UPD_TASK_REASON profile option in the Performance Lookups task in Setup and Maintenance.
5. Click **Submit**.

Note: HR specialists can use HCM Data Loader to delete performance documents for multiple employees at once.

If you're a manager, you can delete canceled documents you manage.

1. Go to **My Team > Performance**, or use the Performance tab on the employee's person spotlight page.
2. Filter to show only canceled performance documents. From the row actions, click **Delete Document.**

You can only delete documents that are already canceled. Managers can delete canceled documents they manage.

Impact of Deleting a Canceled Performance Document

- All content, ratings, and comments are permanently deleted.

- Any changes to talent profiles made through the document will revert to their previous state.
- You might still see the deleted document listed on Performance Management pages for reference.
- If notifications are enabled:
  - If HR specialists delete the document, both the employee and their manager are notified.
  - If a manager deletes it, only the employee is notified.

> **Tip:** If you want to remove the deleted performance document from an employee's view when eligibility profiles are in use, HR specialists can use the Performance Eligibility task. To prevent the creation of anytime documents, implementors can deselect the **Available to Use** option for the relevant document period in the performance template. Implementors can enable audit tracking for deleted performance documents and their contents, but remember, you can't restore deleted documents or their data from the audit.

Manage Performance Documents for Inactive Assignments

You may have to create or open a performance document for a worker whose assignment is either inactive due to termination or transfer, or suspended.

Terminated Assignments

You can search and create performance documents for terminated assignments that are either:

- Managed by a terminated manager
- Assigned to a terminated worker

On the Performance Documents page, use the Assignment Status filter and select **Inactive** to find documents for terminated assignments. Note that terminated assignments are inactive assignments.

Suspended and Inactive Assignments

Similarly, on the Performance Documents page, HR specialists and managers can use the Assignment Status filter to find suspended and inactive assignments.

Monitor Late Tasks in Performance Documents

As an HR specialist, you can quickly identify tasks in performance documents that managers and workers are late to complete. You can change due dates or send reminder notifications as needed.

Use filters on the Performance Documents page to find documents with overdue tasks. Late tasks are determined by the due dates set in the performance template for each document period. If a performance document has more than one late task, you'll see all overdue tasks in your search results. You can search for one performance document at a time and for employees you have security access to, but not for yourself or your own documents.

Here’s what you can do with late tasks:

- **Change Due Dates**: Select a performance document, click **Change Due Dates**, and edit due dates for any or all tasks within that document.
- **Send Reminders**: This action is only available for late tasks.
    - Send a reminder to the task owner (worker or manager) to take action.
    - Notify the performance document manager if a worker’s task is late.
    - Add additional recipients, such as a project manager.
    - Send a notification for one late task in one performance document at a time.

Return Performance Documents to Continue Evaluation

Managers can return performance documents to team members for which the self-evaluation task is complete. This lets the team members to continue to work on their evaluations.

After the team member completes the self-evaluation again, managers, employees, and participants can complete the remaining tasks in the performance document. Managers can use the Return to Worker action available on the Evaluate Performance page or the Performance tab in person spotlight.

You can see the **Return Self-Evaluation to Worker** row level action for performance documents when these conditions are met:

- The performance document is configured to include the Worker Self-Evaluation task.
- The team member has completed the Worker Self-Evaluation task.

Impact of Returning a Performance Document

Here's what happens when you return a performance document:

- The Worker Self-Evaluation task and performance document statuses change to In progress.
- If the **Manager resets worker's self-evaluation** notification is enabled, then the team member gets a notification that you returned the performance document.
- The team member can continue with the evaluation.
- All tasks in the performance document after the Worker Self-Evaluation task are reopened and the task owner needs to complete them again.
- Existing data from the previously completed tasks remains intact. Although the evaluation tasks must be completed again, evaluators don't have to recreate the data.

2 Other Administative Tasks

Process Mass Actions for Performance Documents

Save time by processing performance documents for multiple employees at the same time using the Process Mass Actions for Performance Documents administration task.

The actions are available at **My Client Groups > Performance > Process Mass Actions for Performance Documents > Add**.

After you submit a process, you can query and filter them using the submission or completion date.

- **Create**, **Complete**, **Cancel**, and **Delete Performance Documents** actions: Use to create, complete, cancel, and delete performance documents. This uses HCM Data Loader (HDL) for mass processing of performance documents. Remember to assign the Human Capital Management Integration Specialist Job role to the HR specialist to use this functionality.
- **Print Performance Documents**: Use to mass print performance documents. You can save the data to a file and save that file to a content server in Oracle WebCenter Content. For more information, see the Middleware System Administrator's Guide for Content Server.
- **Change Current Task**: Change the current task in performance documents using a scheduled process. The process performs a mass update to change the current task that’s next to be actioned, even if previous tasks are incomplete. For example, you want managers to complete their evaluations, but some employees haven’t finished their self-evaluations so you want to set the current task to the manager evaluation. After you select the employees that you want to update the current task for, preview the results of the process in a log file or submit it immediately. The process can move an employee’s performance document to a later task or back to an earlier task. Either way, the owner of the new current task or the owner of each bypassed task is notified. You perform these tasks for a specific performance document.
- **Change Task Due Dates**: Use to change the due date of a task in the performance document. Use the action to process all task due dates for employees performance documents. You can edit the due date of any task within a performance document that isn't completed or canceled.
- **Update Model Profile Competency Sections**: Use to update the competency sections in performance documents populated using a model profile. You can run the process to add any new competencies that were added to job, position, or organization profiles to performance documents that use those profiles. The process only updates in-progress performance documents. In-progress performance documents are when any of the evaluation tasks, worker self-evaluation, manager evaluation, and manage participant feedback are incomplete. The process only adds new competencies to performance documents. If performance documents include competencies that are no longer relevant, then you need to manually remove them. Competencies that are end dated in Profiles aren't automatically removed from performance documents, so comments, ratings, weights, and calculated ratings aren’t impacted.

Run Performance Management Scheduled Processes

Run these scheduled processes for Performance Management.

Process Name	Description	Parameters
All-in-One Evaluations for Performance Documents	Initiates the process to submit manager evaluations and calculate section ratings for performance document data on the All-in-One Evaluations page.	No parameters, submit the process.
Manage Eligibility Batch Process	Determines the eligibility of workers for performance documents.	**Batch Process Type**: Assign Performance Document Assign Check-In Template Select one of the batch process types to select these parameters: **Effective as of Date**: It determines when workers are eligible for performance documents or check-in templates. If you set a future date, performance documents can only be created for eligible employees from that date. Select Current Date to use the system date every time the process runs. **Review Period**: Using this, you can find a performance document that matches the selected review period. **Performance Document Name**: Select the name of the performance document that you want to process. OR • **Check-In Template Name**: Select the name of the check-in template that you want to process. **Create Eligible Performance Document**: If you select this, the application automatically creates performance documents for each eligible employee. **Purge Historic Performance Eligibility Status Data**: Choose whether to permanently delete historic performance eligibility status data to improve system performance. **Purge Older Than**: Purge any data older than the specified date.
Migrate Performance Setup Data History	Initiates the performance setup data history migration process from E-Business Suite to Oracle Fusion HCM.	Specify the FTP Outbox Directory.
Migrate Performance Transaction Data History	Initiates the performance transaction data history migration process from E-Business Suite to Oracle Fusion HCM.	Specify the FTP Outbox Directory.
Performance Data Integrity Check	Initiates the job to check data integrity for Performance Management.	**Action**: Preview the changes or select Update to submit the changes. **Performance Document**: The document for which this is applicable.

Process Name	Description	Parameters
		Worker Person Number: The worker person numbers for whom the performance document is applicable.
Performance Management Diagnostics Report	Initiates the process for the diagnostics report for Performance Management.	Select one of the following report types: • Performance Document • Check-In • Performance Management Security **Work Person Number**: The worker person numbers for whom the performance document is applicable.
Purge Historic Performance Management Eligibility Status Data	Initiates the job to delete historic performance management related eligibility status data.	**Purge Data Older Than Date**: Purge any data older than the specified date.
Reassign Performance Documents with Terminated Managers	Initiates the process to reassign current performance documents when the performance document manager is terminated, to the new line manager or the terminated managers line manager depending on configuration.	**Action**: Preview the changes or select Update to submit the changes. Select the Manager type to reassign the documents using these options: • Employee's line manager • Terminated manager's manager **Review Periods**: Specify whether performance documents in specific review periods or all review periods should be processed.
Send Performance Document Alert Notifications	Sends a standard or critical notification alert when a task in a performance document is due to be completed according to the due date. No parameters, submit the process.	No parameters, submit the process.
Synchronize Goal Data in Performance Documents	Synchronizes goal data in performance documents with the goal data in Goal Management and Career Development.	**Action**: Preview the changes or select Update to submit the changes. **Review Period**: Use the review period to help filter and find the goal plans you want to process. **Goal Plans**: Select the goal plans from which data needs to be synchronized to performance documents.
Synchronize Person Profile Competencies in Performance Documents	Synchronizes competencies in performance documents with the person profile competencies in Profile Management.	Run this process to bring competencies that haven't been brought into the performance documents automatically using the person profile competency in a performance template. **Action**: Preview the changes or select Update to submit the changes. **Review Period**: Use the review period to help filter and find the goal plans you want to process.

Process Name	Description	Parameters
		Performance Document Name: Select the performance document in which competencies need to be synchronized. **Worker Person Number**: Specify the person numbers of the workers to whom the performance document is applicable.
Transfer Performance Documents with Manager Change	Initiates the process to transfer current performance documents from a manager for an employee's assignment to the replacement manager.	No parameters, submit the process.

HCM Data Loader and Performance Document Business Objects

Use HCM Data Loader for bulk-loading and maintaining data about business objects.

HCM Data Loader supports these business objects for Performance Management:

- Performance Document
- Performance Documents and Goals Assignment Transfer
- Performance Document Eligibility

View Business Objects

To view business objects, follow these steps:

1. Go to **My Client Groups** > **Data Exchange** > **View Business Objects**.
2. Type the name of the business object, for example, **Performance Document**, in the text box above the **Business Object** column and press **Enter**.
3. Click the name of the business object to view its component details and attributes. Click a child object in the Components section on the left to view its details.

Performance Document

Using this business object, you can create, complete, cancel or delete performance documents for an employee. You can also transfer performance documents to a new manager if the original manager should no longer complete the evaluation.

It has these child components:

- Participants - you can add or delete participants and send requests to participants to provide feedback for performance documents for multiple employees at the same time.
- Attachments - you can add or delete attachments from a performance document.

Performance Documents and Goals Assignment Transfer

Using this business object, you can transfer an employee's performance documents and goals from one assignment to another for a specific review period. For example, when an employee is transferred globally and a new assignment is created for the transfer, you can move the employee's performance documents and goals from the old, inactive assignment to the new assignment.