Oracle Fusion Cloud Talent Management

Performance Management Questions and Answers

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1 Performance Management Questions and Answers

How do I configure a Dynamic Skills performance template section?

1. Go to **My Client Groups > Performance > Performance Template Sections**.
2. Click **Add** to create a new Dynamic Skills section.
3. Fill in the required details including the sequence number.
4. Under Section Type, select **Dynamic Skills**.
5. Choose the relevant skill assignment types.
6. Select the skill development filter.
7. Set rating model, calculation rules, and weighting as needed.
8. Save your changes.

How do I configure and access check-in notes for a competency in an employee's performance document?

1. Configure the Process step of your performance template and enable the **Display Check-Ins** check box.

   The competency with notes in a check-in should have the same review period as the performance document.
2. Configure your check-in template and enable the **Include in performance document** check box.
3. In the performance document that needs to be evaluated, expand the competency, and click **Show competency info** to view the Check-in progress notes region.

How do I show or hide participant details on the Manage Participant Feedback page?

Configure the page properties listed in this table.

Page Property Name	Label	Description
HIDE_PROVIDE_FEEDBACK_AS_FIELD	Hide Provide Feedback As Field	This property hides the Provide Feedback As field on the Manager Participant Feedback page.
HIDE_ROLE_COLUMN_IN_PARTICIPANT_ FEEDBACK_SUMMARY	Hide Role Column in Participant Feedback Summary Table	This property hides the Role column in the Participant Feedback Summary table on the Manager Participant Feedback page.
HIDE_ROLE_DESCRIPTION_COLUMN_IN_ PARTICIPANT_FEEDBACK_SUMMARY	Hide Role Description Column in Participant Feedback Summary Table	This property hides the Role Description column in the Participant Feedback Summary table on the Manager Participant Feedback page.

How can I prevent goals from being evaluated if the goal setting period hasn’t yet finished?

1. Go to **My Client Groups > Performance > Performance Templates** and create a template.
2. In the Structure step for the performance goals section, enable the **Lock evaluation during goal setting period** option. This setting is editable only if **Rate goals** or **Enable item comments** is enabled.

How do I process mass actions for all population types?

1. Go to **My Client Groups > Performance > Mass Action Processes for Performance Documents**.
2. Select any action. Then select **All** in Population Type. All performance documents that meet other criteria will be processed.

What happens if I select Not ready to evaluate in a Redwood performance document?

As an employee or manager you can select the **Not ready to evaluate** option if it has been configured for your document to indicate items that should be excluded from ratings, comments, or calculations by all roles.

This option isn't available for participants. If item weight is enabled and the weight for an item you don’t want to evaluate isn’t 0% then **Not ready to evaluate** appears disabled. When the weight is set to 0%, it’s enabled.

What's the implication of setting Choose to Evaluate to Yes in the Structure step of a Redwood synchronized performance template?

This gives employees and managers the option to mark certain items as **Not ready to evaluate** during their evaluation tasks in the performance document. It excludes those items when providing evaluation ratings, comments, or processing calculations.

If ratings or comments had already been entered by the employee, manager, or participant before **Choose to Evaluate** was set to **No**, then those ratings and comments are stored in the system but aren't displayed in the performance document. If you set it to **Yes** later, the previously entered ratings and comments are displayed again.

You can configure **Choose to Evaluate** even when the template is in use. The changes will reflect in the performance document.

How do I enable automatic sync of goals in Redwood performance documents?

If you're creating Redwood performance templates and performance template sections to create performance documents, the sync of goals as content is automatic and enabled by default.

When you create a performance template, you select a review period for each document period. The performance document period is connected to a goal plan by the document type, the evaluation type, and the review period. Similarly, when you create a goal plan, you select a review period and then associate performance document type and evaluation types with the goal plan. Only goals from goal plans with the same review period, performance document type, and evaluation type as set in the performance template appear in a performance document when you create documents based on the template.

If you have in-progress performance documents created from responsive performance templates that didn't have synchronized goals enabled then it won't be possible to update those in the Redwood performance document. You can set those documents to completed or closed before you create Redwood performance documents.

What happens when goals are synced in Redwood performance documents?

When goals are synced in performance documents, here's what happens:

- Employees and managers see the same performance and development goals in performance documents as they do in Goals Center and Career Development.

- Performance goal weights are synchronized between Goals Center and the performance document.
- If approvals are enabled for performance and development goals, then pending approvals display in the performance document.
- Goals in a performance document are frozen when the evaluation tasks are complete. At the time of evaluation, a snapshot of the goal is created for the performance evaluation record. Although goals can continue to be updated in Goals Center (for example, some performance goals may be extended to the following period, or some development goals may be long-term goals that cover longer periods than the dates of a performance document) the evaluation keeps the point-in-time snapshot reference of goal information.

How do goals get populated in Redwood performance documents?

Goals are populated automatically when Redwood performance documents are created.

Goals are also automatically synced every time changes are made in Goals Center, based on matching review periods, document types, and evaluation types configured in the performance template.

How do I remove goals from Redwood performance documents?

You can't remove goals directly from the performance document.

Since goals are auto synced in Redwood performance documents, the goal needs to be canceled or deleted from the goal plan in Goals Center for it to be removed from the performance document. Goals can't be canceled or deleted if they've already been evaluated in a performance document.

How do I add or update competencies in a Redwood performance document?

You can’t manually add or update any competencies directly in the performance document. The Redwood performance document is synchronized with content such as goals and competencies.

If the performance template is configured for synchronized goals then the synchronized performance template behavior is the same for competencies as well.

- If you’ve configured a performance template section with person profile competencies, when you create a performance document, the competencies are populated from the employee’s Talent profile at that time. If new competencies are added to the employee's Talent profile after the performance document is created, HCM Events is initiated to add the new competencies to the performance document.

If there are issues with the automatic sync, you can run the Synchronize Person Profile Competencies in Performance Documents scheduled process. This process checks for duplicate competencies when adding any new ones to the performance document.

- If you've configured a performance template section with model profile competencies then those are also added to the performance document when it's created.

  If the model profiles are updated with new competencies, you can run the Process Mass Actions for Performance Documents scheduled process to add new competencies to performance documents.

What data sources does AI use to generate manager overall summary comments in Redwood performance documents?

If enabled for the overall summary topic, AI Assist generates summarized data from these sources:

- Participant Feedback: evaluation comments entered by participants in the same performance document for items or sections.
- Anytime Feedback: anytime feedback comments given to the employee in the last 13 months.
- Manager Comments: evaluation comments the manager has provided in the same performance document for items or sections.

How do I personalize the user interface text on the Redwood performance documents pages?

You can use the User Interface Text tool to modify text on the Performance Document pages.

How do I enable users as substitute performance document evaluators?

Substitute performance document evaluators are usually administrators, HR specialists, or Area of Responsibility (AoR) who enter evaluation ratings and comments on behalf of the manager. HR specialists can also perform the employee tasks in a performance document, if the employee doesn't have access to the application.

To enable a user to substitute as performance document evaluator, do the following:

1. Ensure the employee for whom the evaluation is being performed is in the user's security profile.
2. Grant these privileges to access the employee's spotlight page:
    - View Performance Summary Data (HRA_VIEW_PERFORMANCE_SUMMARY_PRIV)
    - View Check-In Document Data (HRA_VIEW_CHECK_IN_DOCUMENT_PRIV)
    - Manage Check-In Document (HRA_MANAGE_CHECK_IN_DOCUMENT_PRIV)
3. Grant the Manage Performance Document privilege to view the performance document of which the user isn't the named performance document manager.
4. Grant the Evaluate Performance Document as Manager (ORA_HRA_EVALUATE_PERFORMANCE_DOCUMENT_AS_MANAGER) privilege to act as a substitute performance document evaluator.

    Although substitute performance document evaluators can enter evaluation ratings and comments on behalf of the manager, it is still the manager's name that displays in the performance document.

    If you have audit enabled, you can see details of the user who entered the ratings and comments on behalf of the manager.

    As performance documents have named managers, HCM Delegation can't be used to perform the manager tasks for a performance document.

How do I set the minimum and maximum character limits for evaluation comments?

You can set the maximum and minimum number of character limit for evaluation comments in the Process step when you create a performance template.

Based on whether comments for each section are configured to be optional with or without warning, or required, the application determines if these limits are required or a guide for the comments being entered. The minimum and maximum character limit is only applicable to evaluation comments included in the worker self-evaluation, manager evaluation, or the participant feedback task. The count of the characters includes letters, numbers, and HTML tags.

Can workers see participant feedback on the Manage Participant Feedback page?

Yes, they can. There are 2 configurations that determine this.

1. The **Worker can view feedback before evaluations are complete** option is enabled in the process flow for the document. If this isn't enabled, they'll only be able to see participant feedback in the performance document.
2. Both View Participant Roles and View Participant Names are set to **Yes** in the Processing by Role section for all sections in the performance template. If either are set to **No** in any section, workers can only access the participant feedback in the respective sections of the performance document where it's configured.

What happens if I enable the Include digital signature option in the Process step?

If enabled, workers need to confirm they're the people submitting the performance document by selecting the confirmation option in the Provide Final Feedback subtask. This task must be included in the process flow to activate it.

How are decimals calculated in performance template ratings?

Let’s say you configure a performance template with an overall summary section that uses calculated ratings and the calculation rule for the section is set to Band with the mapping metrics set to Points Range.

Here’s what happens:

- First, ratings are calculated for sections other than the overall summary section.
- Next, the numeric rating for the other sections are added and mapped to the profile rating model used for the overall summary section.
- Then, the number in From Points and To Points of the Review Points is compared and this includes considering any decimals that have been entered to determine the rating.

How do I update performance document model profile competency sections?

Here's how:

1. Go to **My Client Groups > Performance > Process Mass Actions for Performance Documents**.
2. In the Mass Action Process for Performance Documents page, click **Actions** then **Update Performance Document Model Profile Competency Sections**.
3. Select a review period and then select a performance document. Optionally specify a reason for the action.
4. Select the population type followed by the assignment status.
5. Click **Create in Spreadsheet** to review the data or submit for immediate processing.

How do I display additional person fields in the Talent Redwood page headers?

You can enable the page properties listed in the following table to display additional person fields in the Redwood page headers:

Page Property Name	Page Property Description
Person Header Slot -1	First slot in the contextual header section of the page that displays person attributes.
Person Header Slot - 2	Second slot in the contextual header section of the page that displays person attributes.
Person Header Slot - 3	Third slot in the contextual header section of the page that displays person attributes.
Person Header Slot - 4	Fourth slot in the contextual header section of the page that displays person attributes.
Show Labels in the Contextual Header Section	Show or hide all the field labels in the contextual header section. The default value is to hide the labels.

Here are the attributes you can add:

- Performance document name
- Document description
- Performance document manager name
- Person number
- Work email
- Business title
- Assignment Number
- Job name
- Position name
- Position code

How can I control the formatting options in performance documents?

1. In the performance documents page, click **Edit Page in Visual Builder Studio** in the Settings and Actions menu.
2. Select your project or create a new one.
3. Ensure you're in the Express mode.

4. Set the ToolbarvariableArray page property. For example, clear formatting or any other property as required.
5. Preview and publish your changes.

How do I exclude inactive development and canceled performance goals from a performance document?

There's no setting to exclude inactive or canceled goals in the Redwood experience because all content is synced and inactive development goals and canceled performance goals aren't populated to the performance document.

The option to exclude goals is available only in performance templates that don't use synced goals.

Inactive development goals or canceled performance goals could display in a performance document if they were evaluated before being inactivated or canceled. In this case, the associated ratings and comments need to be deleted from the performance document to remove them from the document. Then during the next sync, the goals are automatically removed from the performance document. Note that goal dates aren't considered.