

Oracle Fusion Cloud Talent Management

Implementing Performance Management



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Get Help

There are a number of ways to learn more about your product and interact with Oracle and other users.

Get Help in the Applications

Some application pages have help icons  to give you access to contextual help. If you don't see any help icons on your page, click your user image or name in the global header and select Show Help Icons. If the page has contextual help, help icons will appear.

Get Training

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You can email your feedback to oracle_fusion_applications_help_ww_grp@oracle.com.

Thanks for helping us improve our user assistance!

1 Introduction

Overview of Implementing Performance Management

This guide describes the setup and implementation tasks for Performance Management work area in the Workforce Development offering. Using these tasks you can implement and maintain Oracle Fusion Performance Management to set up performance documents to review workers as part of a performance evaluation.

Oracle Fusion Performance Management Cloud Service is part of the Workforce Development offering of Oracle Human Capital Management Cloud. To start an implementation of Oracle Human Capital Management Cloud, a user with the Application Implementation Consultant role (ORA_ASM_APPLICATION_IMPLEMENTATION_CONSULTANT_JOB) must opt into the offerings applicable to your business requirements. Refer to the Oracle Applications Cloud Using Functional Setup Manager guide to manage the opt-in and setup of your offerings. This topic:

- Lists where to find information about prerequisite tasks and pertinent information about implementing Oracle Fusion Performance Management
- Describes the Worker Performance functional area of the Workforce Development offering

Prerequisites

Before setting up Performance Management you must implement either:

- HCM Base
- Talent Management Base

You are also required to configure other applications and elements. The table lists sources of information, including guides and help topics, and a description of what they contain, to help you set up the configuration that fits your business needs and processes.

Source	Contents
Oracle HCM Cloud Getting Started with Oracle Talent Management Cloud	Provides an overview of Talent Management Cloud options, purchasing and activation options, basic information for implementing Talent Management applications, and describes work areas.
Oracle Talent Management Cloud Implementing Talent Management Base	Describes user and role synchronization, implementation user setup, enterprise and workforce structures, workforce profiles, approvals, help configuration, and more.
Oracle Global Human Resources Cloud Implementing Global Human Resources	Describes user and role synchronization, implementation user setup, enterprise and workforce structures, workforce profiles, approvals, help configuration, and more.
Human Capital Management Cloud Integrating with Oracle HCM Cloud	Describes integration types, how to use file-based and spreadsheet loaders, integrations with Oracle Taleo Recruiting Cloud Service, web services, and coexistence.
Human Capital Management Cloud Securing Oracle HCM Cloud	Describes Oracle Human Management Cloud security, types of roles and how to create them, managing user accounts, types of security profiles and managing them and Oracle Fusion Transactional Business Intelligence and Business Intelligence Publisher security.

Workforce Development Offering

Use this offering to configure and define the worker performance. The functional area in the offering and primary features are available in the following table.

Functional Area	Description
Worker Performance	Use this functional area to configure worker performance settings such as value sets, lookups, profile options, notifications, performance roles, Talent eligibility profiles, scheduled processes, document types, templates, target ratings distribution, performance and potential box chart labels.

Related Topics

- [Plan Your Implementation](#)

Guide Structure

This topic gives a summary of each chapter and describes where to find additional information for the tasks in the Worker Performance functional area.

The primary features of the Workforce Development offering are explained in this guide. For the full list of functional areas and features in this offering, use the Associated Features report that you review when you plan the implementation of your offering. This topic describes the contents of each chapter included in the following sections of the guide:

- Introduction
- Questionnaires
- Performance Management Settings
- Performance Management Application Implementation

Introduction

This table provides the chapter details.

Chapter	Title	Contents
2	Overview and Integrations	An overview of the Performance Management implementation and description of how it integrates with other applications.

Personalization

This table provides the chapter details.

Chapter	Title	Contents
3	Personalization Using Transaction Design Studio	Using Transaction Design Studio to hide or include fields in performance pages.

Questionnaires

This table provides the chapter details.

Chapter	Title	Contents
4	Questionnaires	Creating questionnaire templates, questionnaires, and questions to use in the Manage Participant Feedback task in a performance evaluation.

Performance Management Settings

This table provides the chapter details.

Chapter	Title	Task	Contents
5	Descriptive Flexfields	Performance Descriptive Flexfields	Describes the available flexfields for Performance Management and where they're used.
6	Profile Options	Performance Profile Option Values	Describes how to configure the profile options for Performance Management and the effects of the settings.

Performance Management Application Implementation

This table provides the chapter details.

Chapter	Title	Contents
7	Performance Roles	Creating roles that can access performance documents to provide feedback and enter ratings and comments about a worker.
8	Matrix Management	Configuring roles, process flows, and performance templates to use matrix management.

Chapter	Title	Contents
9	Eligibility Profiles	Creating eligibility profiles to restrict availability of performance documents to a specific population based on criteria you set up.
10	Eligibility Batch Process	Describes how to run the eligibility batch process to determine which performance documents a population of workers is eligible to use for their performance evaluation.
11	Performance Process Flows	Configuring process flows to determine the tasks, and their sequence, used by the performance template for performance evaluations.
12	Performance Template Sections	Configuring sections that are required for the tasks in the process flow, including section type, calculation rules and rating models used in the sections, weighting, and adding content items.
13	Review Periods	Create review periods to link performance management and goal management business objects to measure and achieve results within the review period time line.
14	Performance Document Types	Create performance document types to associate with performance templates to create performance documents, and goal plans to determine which goal plan is used to populate performance documents with goals.
15	Performance Templates	Configuring performance templates used to create performance documents to specify the process flow definition, the sections, and the document type, add review periods, static content, and roles that can access the document.
16	Check-In Templates	Creating check-in templates to meet your organization requirements and facilitate the process of creating check-in documents by the manager and employees.
17	Feedback Templates	Creating feedback templates to meet your organization requirements and facilitate the process of seeking feedback in the organization all through the year.

Setup Tasks for Implementing Performance Management

To implement Oracle Fusion Cloud Performance Management, you must have the Application Implementation Consultant role (ORA_ASM_APPLICATION_IMPLEMENTATION_CONSULTANT_JOB).

Oracle Fusion Cloud Performance Management is part of the Workforce Development offering of Oracle Fusion Cloud Human Capital Management. Review the tasks listed in this table before you set up Performance Management.

Task Name	Description	Recommended Help
Manage Participant Feedback	Create questionnaire templates, questionnaires, and questions for a performance evaluation.	Participant Feedback
Performance Descriptive Flexfields	Describes the available flexfields for Performance Management and where they're used.	Descriptive Flexfields for Performance Management
Performance Profile Option Values	Describes how to configure the profile options for Performance Management and the effects of the settings.	Performance Management Profile Options
Performance Process Flows	Create process flows for performance evaluations to determine which tasks to include, and the order to perform them.	Options for Performance Process Flow Setup
Talent Performance Notifications	Enable or disable Performance Management notifications.	Overview of Notifications
Performance Roles	Define roles to expand the scope of the performance evaluations to include feedback from participants other than the worker and their manager.	Performance Roles
Eligibility Profiles	Create and update combinations of criteria to determine eligibility for performance documents.	Examples of Using Eligibility Profiles with Performance Documents
Performance Template Sections	Create sections to include in the performance document template.	Considerations for Creating Performance Template Sections
Performance Document Types	Create performance document types to differentiate types of performance evaluations, such as annual or project-specific.	Overview of Performance Document Types
Questions	Create questions and format question types to use in questionnaires.	Guidelines for Loading Questions, Questionnaire Templates, and Questionnaires
Questionnaire Templates	Define questionnaire templates from which to create questionnaires to use to solicit feedback.	How You Configure Questionnaire Templates
Questionnaires	Define questionnaires to determine the layout, and add questions and sections to use to solicit performance feedback.	Questionnaires Participant Feedback

Task Name	Description	Recommended Help
Performance Templates	Create templates for performance documents, including the structure, processing rules, content, and periods.	Guidelines for Setting Up Performance Templates
Eligibility Batch Process	Determine which performance documents a population of workers is eligible to use for their performance evaluation.	Eligibility Batch Process for Performance Documents and Check-In Templates

Use these actions of Transaction Design Studio (TDS) to configure Performance Management pages:

- Performance Document
- Performance Management
- Performance Spotlight

For more information about configuring Performance Management pages using TDS, see the [How You Configure Performance Pages Using Transaction Design Studio](#) topic.

Security Reference

The tasks that people can do and the data that they can see depend on their roles, duties, and privileges. For information about these factors, see these two guides:

- [Securing HCM](#)
- [Securing Reference for HCM](#)

Options for Navigating in Performance

This topic explains the different ways to navigate to the same page and how we refer to pages and areas in Performance.

Setup and Maintenance

Did you know that you can use either the Setup and Maintenance work area or the Setup Maintenance area under My Client Groups to access the same pages? This guide refers to the Setup and Maintenance work area and it's up to you which way you access the page it's referring to. For example, you can reach the Performance Template page in both of these ways:

- **My Client Groups > Performance > Setup Maintenance**
- On the toolbar, click the arrow by Initials or user image to open the **Settings and Actions** menu. In the Administration area, click **Setup and Maintenance**. Click the arrow by the **Setup** menu and scroll to **Workforce Development**. In the left part of the UI, click **Worker Performance**. Then on the right area of the UI, click **Performance Template**.

Performance Pages

This guide refers to Performance pages as a grouping to describe all the pages a user can access. For example:

- An employee selects the Performance tab to see their Performance spotlight page.
- A manager accesses the Performance Overview and Evaluate Performance pages.
- An HR specialist accesses all pages under My Client Groups.

Deep Links

You can use deep links to provide easy navigation directly to a page in the HCM Cloud application.

You can also use deep links for mobile responsive pages on your intranet, custom and third-party applications, or in a document. This helps people run transactions in the HCM cloud and provides quick access to their HR information.

To access deep links:

1. Open the main menu.
2. Go to **Tools> Deep Links**.
3. Copy the URL for a deep link.
4. Paste the URL in the appropriate location.

When you open Deep Links, you find a list of all available deep links.

Overview of Performance Management Scheduled Processes

Use 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,

Process Name	Description	Parameters
		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: select to preview the changes before submitting. - Update: select to submit the changes. Performance Document: The document for which this is applicable. 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

Process Name	Description	Parameters
		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: select to preview the changes before submitting. - Update: select 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: select to preview the changes before submitting. - Update: select 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: select to preview the changes before submitting. - Update: select 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.

Related Topics

- [What are scheduled processes?](#)

2 Overview and Integrations

Overview of Define Worker Performance

Use the Define Worker Performance activity to define and maintain the elements used to create performance document templates. Application implementors and human resource (HR) specialists can use these templates to create the performance documents used to rate workers.

To create and manage performance documents, the performance management business activity requires that workers have a manager record.

For both setup and maintenance tasks, implementors and HR specialists can:

- Create document types, sections, process flows, and roles to use in performance document templates.
- Create performance document templates to define the structure and task flow of performance documents.
- Create default content and target ratings within performance templates and sections.
- Create and edit rating distributions to set the target percentages for worker overall performance ratings for each rating level.
- Create and edit box labels for the Performance and Potential matrix.
- Manage talent eligibility profiles and eligibility batch processes to specify eligibility for performance documents.
- Manage settings for email notifications that the application sends to workers and managers to remind them of upcoming events and tasks.

For setup tasks only, they can also:

- Configure profile options to specify the:
 - Default rating model for Oracle Fusion Performance Management analytics and HR comparisons
 - Number of years in the past and the future for which to display performance documents to managers and workers based on the document end date
 - Autosave interval to specify the number of minutes before the performance document saves automatically
- Manage descriptive flexfields to add company-defined attributes to entities, and define validation and display properties for them.
- Manage performance value sets for descriptive flexfields.
- Manage performance lookups, the lists of values that appear in Performance Management pages.

Use the Setup and Maintenance work area to access the tasks in the Define Worker Performance task list. You can also use the Performance Management work area to access the maintenance tasks.

Related Topics

- [Options for Performance Process Flow Setup](#)
- [Considerations for Creating Performance Template Sections](#)
- [Guidelines for Setting Up Performance Templates](#)

How Performance Document Components Work Together

To create a performance document you need a performance template. The performance template contains a document type, template sections, and a process flow. Create these either when creating the performance template or select previously-configured ones.

Document Types

Document types categorize the types of performance documents that are valid for an organization, such as annual evaluation or semiannual evaluations, a project evaluation, and so on. You set the dates to determine the time period that a document type is valid.

Performance Template Sections

A performance document can have several sections, such as a Summary and Evaluation Topics. The sections support the process flow used by the template.

In the sections you configure the types of content that can be rated and the processing options for ratings. You also determine the sources of content, and how the performance documents integrate with:

- Profiles from the profile management business process
- Performance goals from the goal management business process
- Development goals from the career development business process

Sections can also contain options for managers and workers to provide final feedback about the evaluation.

Process Flows for the Evaluation Process

Create process flows to determine which tasks workers, managers, and participants perform as part of the evaluation process. For example, you can include tasks to set goals, let managers and participants evaluate workers, and workers evaluate themselves. You can create as many process flows as required to correspond to the different evaluation requirements of your enterprise.

The process flow dictates which sections are required for the performance template. For example, if the process flow includes the task for managers to rate workers, you must set up Profile Content, Performance Goals, or Development Goals sections where managers can rate workers on competencies or goals, or an Overall Summary section where managers provide an overall rating.

Performance Templates

Performance templates bring together the information used to create performance documents. In the performance template, you:

- Select the roles that can access the performance documents created from the template.
- Select existing eligibility profiles to restrict the performance documents to qualified workers.
- Specify the processing rules for the document.

- Enter the periods for which the performance documents are valid.
- Select the document type, sections, and process flows to use, and any additional content on which to rate workers. You can edit sections as required in the template.

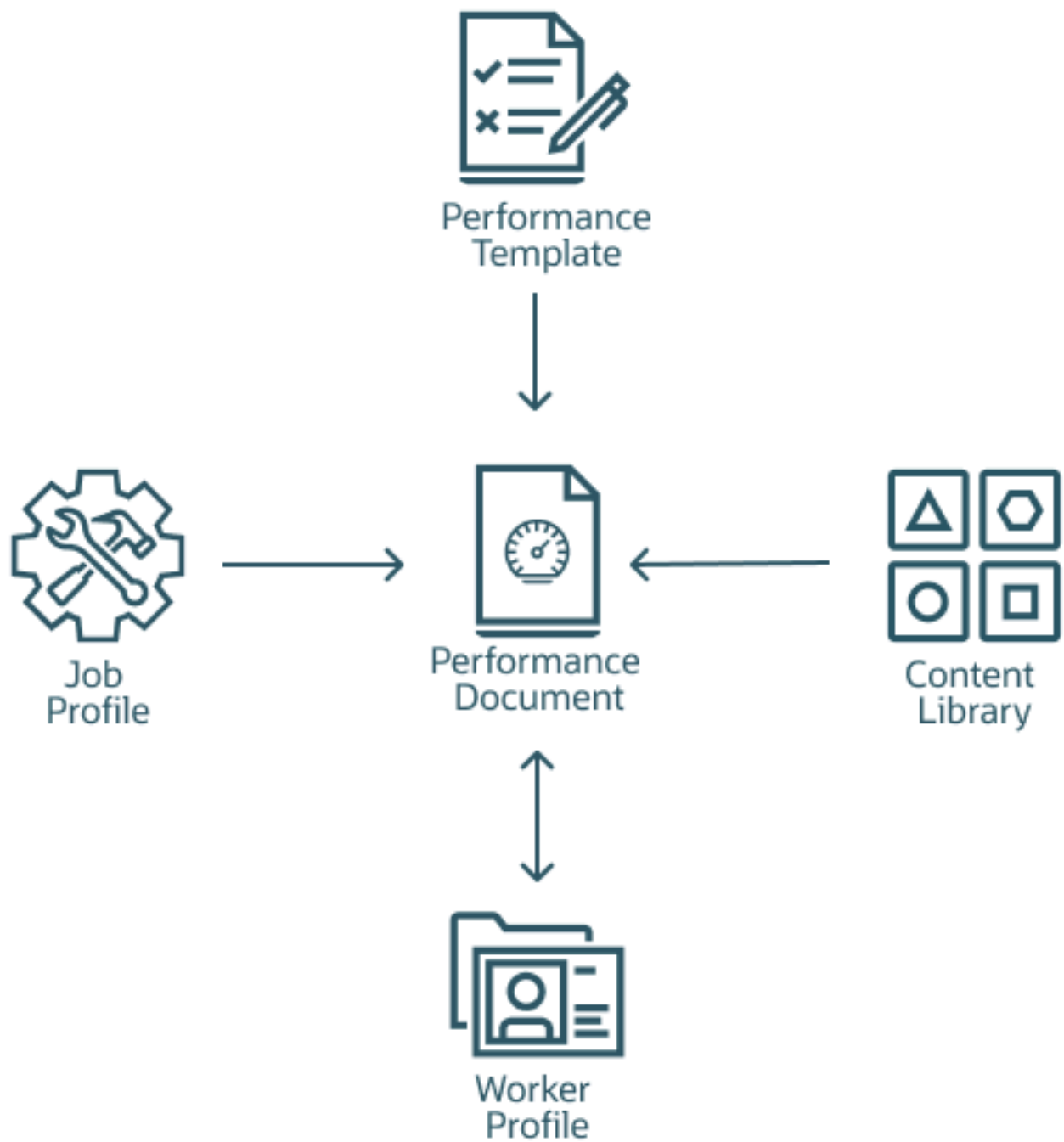
Related Topics

- [Examples of Performance Process Flows](#)
- [Considerations for Creating Performance Template Sections](#)
- [Guidelines for Setting Up Performance Templates](#)
- [Overview of Performance Documents](#)

How Performance Documents Work with Profiles

During a performance evaluation, the line manager or worker can evaluate the competencies in a performance document. When the performance document is complete the worker's person profile updates to reflect competency proficiency levels in the performance document.

This figure illustrates the sources of competencies for the performance document, and how profiles update from the performance document.



Related Topics

- [Guidelines for Setting Up Performance Templates](#)

How Competencies are Populated in Performance Documents

Let's look at how competencies are populated in a performance document.

Performance documents can include competencies from these sources:

- Content library
- Model profile that the employee matches
- Talent profile
- Any other specified profile

Content Library Competencies

The competencies in the content library apply to model profile competency sections. These competencies are populated based on the job, position, or organization profile. Workers and managers can also add a specific competency for an employee from the content library in the performance document.

Model Profile Competencies

If new competencies are added to a model profile you can update the performance document to bring the latest changes in. You can use the update competencies action to update competencies in the performance document.

However, if you remove competencies from a model profile after a performance document is created, then you need to manually remove them from the performance document. If weights and minimum weights are enabled in the performance document, these default in the performance document with competencies populated from a model profile. Changes to the weights in a model profile won't update the weights that already exist in the performance document.

Talent Profile Competencies

Competency sections in a performance document that are populated from the employee's talent profile are automatically synchronized. This means if new competencies are added or removed from the employee's talent profile they are also added or removed in the performance document. Competencies are only removed if they haven't been evaluated.

Target proficiency is populated with the model profile competencies (using the minimum proficiency) and can't be updated in the performance document. Use Minimum Proficiency in the model or talent profile to define the target proficiency in the performance document.

After you've added the competency to the performance document, the target proficiency isn't updated, and can't be edited.

If there are common competencies defined and added to a performance template for all employees at the organization level then when you create a performance document, the performance document can inherit those competencies from the performance template.

Competency evaluation topics are automatically populated with competencies from a model or person profile. Competency sections are either updated from the model profiles that they're associated with or from the employee's talent profile.

How Duplicate Competencies are Removed

When you create or update a performance document, duplicate competencies are prevented from being added to the document.

Here's how duplicates are eliminated when you create a performance document with competency sections:

- Any competencies added to a section in the performance template will populate the performance document first.
- If both model profile and person profile competency sections exist, competencies in matching model profiles (such as job, position, or organization) that haven't already been added from the performance template section are added.
- Finally, all competencies that exist in the employee's matching person profile that haven't already been added from the performance template or model profiles are added. This process avoids having to manually remove duplicate competencies.

You can't manually add a duplicate competency if it already exists in a worker's performance document. If a duplicate competency is added to an employee's person profile, it won't be duplicated in their performance document.

Considerations for Adding or Removing Competencies in Talent Profile Competency Sections

Here are some things to consider when adding or removing competencies in talent profile competency sections.

- Competencies added by managers or employees to the performance document are added to the employee's talent profile with the evaluator type configured in the performance template.
- Talent profile approvals aren't triggered when adding or removing a competency directly in a performance document person profile competency section. If you use approvals in talent profiles and don't want these to be bypassed in the performance document, you can use personalization to hide the add and remove buttons in the performance document.
- Any changes made to competencies in a person profile competency section in a performance document will update any other in-progress performance documents with person profile competency sections where the set goals or evaluation tasks aren't complete. For example, if a new competency is added in a midyear performance document, that competency is displayed in the employee's talent profile and added to the end of year performance document, if created.
- You can exclude competencies that don't need evaluating by marking them as not ready to evaluate, rather than removing them from the performance document.
- Only competencies added directly in performance documents can be deleted. Competencies in an employee's talent profile that have come from another source, can't be removed in performance documents, and must be removed from the original source.
- Competencies deleted by employees won't be removed from other in-progress performance documents if they've already been evaluated by the manager. If a competency is removed from an employee's Talent person profile but has been evaluated in a performance document and has ratings or comments from a contributor (worker, manager, or participant) then it won't be removed from the performance document. If the ratings or

comments are removed and the performance document is updated, then the competency is removed from the performance document.

Synchronize Person Profile Competencies in Performance Documents

If competencies in an employee's Talent person profile are missing from their performance document, you can run the Synchronize Person Profile Competencies in Performance Documents process to identify missing competencies and add them to employee's performance documents.

When HR specialists run the Synchronize Person Profile Competencies in Performance Documents ESS process to add missing competencies to the employee performance document, it'll exclude adding duplicate competencies that already exist in other competency sections in the performance document. Performance documents are updated only if the Set Goals task and other evaluation tasks are incomplete.

- Adds only competencies from the worker's talent profile that are missing from competency sections in the performance document populated using the person profile. Competency sections populated using a job, organization, or position profile aren't impacted.
- Processes in progress performance documents where the Set Goals and evaluation tasks are incomplete.
- Completed and Canceled performance documents aren't processed.
- Recommended to schedule the process to run once a day to keep performance documents up to date.

If an employee performance document has multiple competency sections populated using different model profiles which both contain the same competency (for example, organization and job), then these duplicates will populate the performance document. Ensure your model profiles do not contain duplicate competencies to avoid these from populating performance documents.

Update Performance Document Model Profile Competency Sections

You can use the Update Performance Document Model Profile Competency Sections process to update competency sections in performance documents populated using a model profile.

You can run the process to add any new competencies or remove unevaluated competencies (no rating or comments added) that were added to job, position, or organization profiles to performance documents that use those profiles. This process is available at **My Client Groups > Performance > Process Mass Actions for Performance Documents**. When you submit it, it only updates in-progress performance documents. In-progress performance documents are documents where the evaluation tasks, worker self-evaluation, manager evaluation, and manage participant feedback are incomplete.

If performance documents include competencies that are no longer relevant, then you need to manually remove them. Competencies that are end dated in Profile Management aren't automatically removed from performance documents.

Update Talent Profiles

When the performance document is complete, the application updates the worker's profile to include the changes made in the performance document, if the performance document is configured to do so.

Here's what's included in the updated content:

- Overall rating
- Competencies and their proficiency levels provided by the manager
- Competencies and goal section ratings

The ratings provided by the worker are included when the section in the performance document is populated using the employee's person profile competencies from their Talent profile. After the performance document is complete, it becomes a static document, and any changes to the job competencies aren't reflected in the performance document.

How Performance Documents Work with Performance Goals

This topic explains how Performance Management and Goal Management work together. You can include performance goals in employees' performance documents. This will help you to review their performance and evaluate if they have achieved the goals that were assigned to them.

The details of the performance goals that you see in a performance document is always synchronized with the goal details that you see in Goal Management. How is this synchronization achieved? Review periods and the Performance Goals section of a performance document are the components that help to integrate performance documents and performance goals.

Review Periods

When you create a performance template, you select a review period for each document period. You also associate a document type with the performance template.

When you create a goal plan, you select a review period and then associate performance document types with the goal plan. Only goals from goal plans with the same review period and performance document type as the performance template appear in a performance document when you create it based on the template.

Performance Goals Section

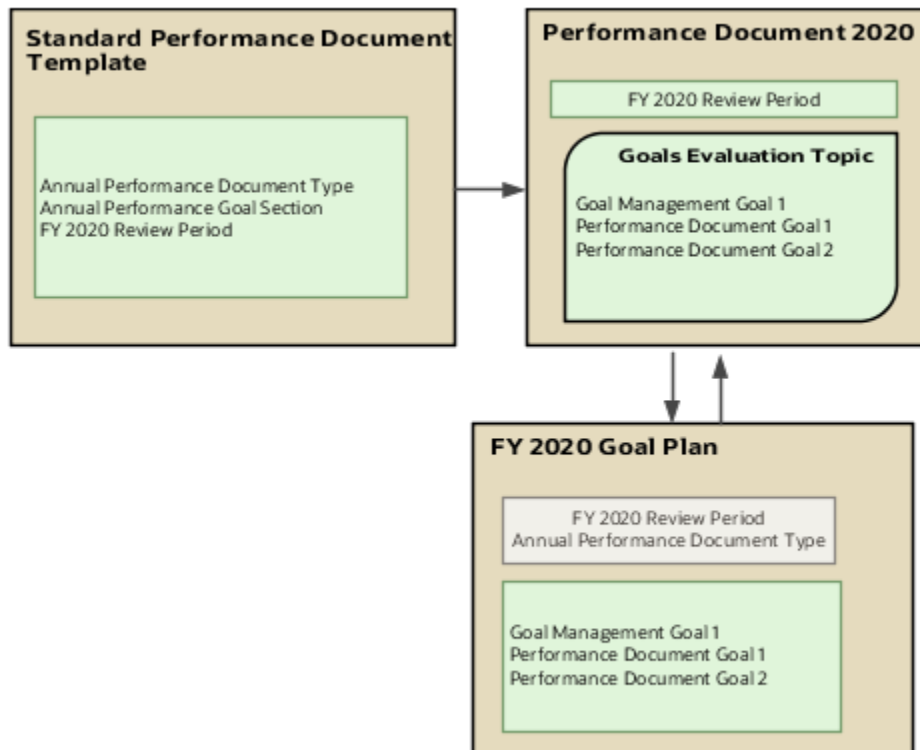
Use the Performance Goals section type in the performance template to create a section for performance goals. For the Performance Goals section, you can use rating models to rate employees and use calculation rules to calculate an overall goal section rating. Remember to enable ratings and comments so that managers, employees, and participants can select a rating for the section and provide comments.

In the Performance Goals section, you can select these check boxes:

- **Populate with Worker Performance Goals:** To add goals from goal plans in Goal Management to the performance document.

- **Allow update goals action to update goal weights from goal management business process:** To update goals in performance documents with weights that are revised in Goal Management.

The image shows how the document type and review period helps to integrate performance documents with goal plans. As you can see in the image, the same document type and review period are used in both the Standard Performance Document Template performance document template and the FY2020 Goal Plan goal plan. When the Performance Document 2020 document is created based on the Standard Performance Document Template document template, the Goal Management Goal 1 goal available in the FY 2020 Goal Plan goal plan is automatically included. You can see the goals added in the Performance Document 2020 document in the FY 2020 Goal Plan goal plan.



Add Performance Goals to Performance Document

Add performance goals to performance documents in these ways:

- Employees and managers can add individual performance goals or library goals directly to a performance document if the goal plan to which they add the goal allows employees or managers to add goals. Remember that only goal plans that match the performance document configuration will be available for adding the goal.
- Note:** If approvals are enabled, performance goals are included after the approval process is complete.
- Employees and managers can import performance goals from other performance documents of the employee. Note that the ratings and evaluation comments aren't copied when you import goals.
 - As you already know, you can associate goal plans in Goal Management with performance document types. When you create any performance document based on an associated document type, the application adds the goals in the goal plan to that performance document.

Update Performance Goals in Performance Documents

Managers or employees can edit goals that already exist in the performance document in Goal Management. Here's how the changes are updated in the performance documents that the goals are included in:

- When the manager or employee opens the performance document, all edits to performance goals except weights appear in the performance document.
- Only when the manager or employee uses the **Update Goals** action in the performance document, goal edits including weights appear in the document.

To populate the performance document with new performance goals from Goal Management, use the **Update Goals** action.

When you edit goals in performance documents, the changes are updated in Goal Management when you save or submit the performance document. But note that the updated weights aren't copied to Goal Management.

Goal ratings provided in performance document aren't available in Goal Management. Evaluation comments added to performance documents don't show up in Goal Management. But you can see comments added to goals in Goal Management in the associated performance documents.

Performance Goals in Completed Performance Document

When a performance document is completed, the performance goals in the document are updated in Goal Management. After this you can't update the goals in the performance document. If the goals are updated in Goal Management, the changes aren't copied to the performance document.

When you reopen a completed performance document, users can edit the performance goals included in the document. You can see the goal changes in Goal Management.

Remove Performance Goals from Performance Documents

Only managers and employees can manually remove goals from performance documents. Note that you can't delete goals that are included in a performance document in Goal Management. They need to be removed from the performance documents first.

Related Topics

- [Review Periods in Talent Management](#)
- [Overview of Performance Document Types](#)
- [Create a Performance Template](#)
- [Create a Performance Template Section for Performance Goals](#)

Automate Synchronized Goals in Performance Documents

View consistent development and performance goal information in both Career Development and Performance Management.

When the HR specialist enables the synchronization of goals in performance documents, employees and managers will see the same performance and development goals in performance documents as they do in goal management and career development. The active performance goals in Goal Management and the active development goals in Career Development display consistently in the performance document. Synchronized performance documents are automatically updated with any new goals added through goal management and career development pages.

Some of the features include:

- Performance goal weights are synchronized between goal management and the performance document. If a goal plan is configured so weights don't have to equal 100%, then they also don't need to equal 100% in the performance document. The exception to this is, if you enable calculated ratings in the performance document, then weights must also equal 100% when completing the worker and manager evaluations.
- The ability to set weights using 2 decimal places.
- Minimum weight isn't supported for synchronized goals.
- If you enable approvals for performance and development goals, then pending approvals display in the performance document. If you make changes to goals through the performance document, then this triggers goal approvals.

1. Enable the `ORA_HRA_SYNCHRONIZED_GOALS` profile option.
2. Create new evaluation types (if required) in the `ORA_HRA_GOAL_PLAN_EVAL_TYPE` lookup. For more information on creating and editing lookups, see [Overview of Lookups](#).
Evaluation type is an attribute that matches a synchronized performance goal section in a performance template to a goal plan.
3. Go to **My Client Groups > Performance**.
4. Select **Performance Template Sections**, and click **Add**.
5. In the **Create Performance Template Section** page, enter the section details and in the **Section Processing** region, select **Development Goals** as the Section Type and select the **Synchronized goals section** check box.
6. Add another section in the **Create Performance Template Section** page, enter the section details and select **Performance Goals** as the Section Type and then select the **Synchronized goals section** check box.
7. Go to **My Client Groups > Performance**.
8. Select **Performance Templates**, and click **Add**.
9. Create a performance template and ensure you select the **Use synchronized goals sections** check box in the **General** tab.
10. In the **Structure** tab of the performance template, add the synchronized development goal section and the synchronized performance goal section.
11. Select the Not ready to evaluate option if you want to give workers and managers the ability to mark goals and competencies as not ready to evaluate.
12. Configure goal plans with the same evaluation type as the synchronized performance goal section in the performance template.
 - a. After you enable the synchronized goals profile option, you can see the **Evaluation Type** field in the definition of a goal plan. This also includes previously created goal plans, which means you can use them with any new synchronized goal performance templates.
 - b. You can create performance documents based on the synchronized goal templates.
 - c. The application automatically updates the created performance documents with any goals added or removed.

How Performance Documents are Processed During Legal Employer Changes

Here's what happens to performance documents during a local and global transfer and a mass legal employer change.

Flow	Who performs this action and on whom	What happens to performance documents	Effective from date
Local and Global Transfer	Both HR specialists and line managers can perform this action on one employee at a time.	There's an option to transfer the performance goals and documents to the employee's new assignment created by the global transfer. This transfers all the performance documents for the employee regardless of whether it's a HR specialist or a manager performing the global transfer. If the Transfer current performance documents for which I am the manager to the new line manager setting is enabled and a new manager has been selected as part of the global transfer and a manager performs the global transfer, then the performance documents are transferred to the new assignment and any performance documents that the manager is responsible for are also transferred to the new manager. For HR, the setting doesn't apply because they are unlikely to be the performance document manager for any of the employees' performance documents.	Changes made on the system date or in the past are processed immediately. Changes dated for the future will be processed on the date of the global transfer.
Mass Legal Employer Change	Only HR specialists can perform this action on multiple employees at the same time	The task copies only the performance goals and documents associated with the primary assignment to the new assignment created by the global transfer.	Mass legal employer changes made on the system date or in the past are processed immediately. Changes dated for the future will be processed using a scheduled process created by the global transfer. The Move Performance

Flow	Who performs this action and on whom	What happens to performance documents	Effective from date
		Performance goals and documents associated with any secondary assignments won't be moved to the new assignment. You can continue to edit, cancel, or delete the performance documents as needed. The task doesn't change eligibility profiles. If the eligibility profiles used for performance goals and documents include inactive assignments, after the global transfer, the inactive assignments continue to be eligible for the same performance goals and documents. To prevent the same performance goals and documents moved to the new assignment being recreated for the inactive assignments you must update the eligibility profiles to exclude inactive assignments.	Goals and Documents process can't be scheduled to run manually. If the global transfer is canceled or the date is changed, the scheduled process will be canceled. The new date will be processed depending on the date. The process is scheduled to run on the effective date of the global transfer. After the process completes, the transferred workers and their new managers can view the performance goals and documents that are moved to the new assignment. The goals and documents won't be visible as part of the old assignment.

Related Topics

- [Mass Legal Employer Change](#)
- [Local and Global Transfer](#)

How You Prevent Changes to Section Ratings During Compensation Calibration

You can prevent managers from changing the section ratings for employees when compensation calibration begins in Oracle Workforce Compensation.

This requires the ORA_HRA_COMP_CALIBRATION_STATUS_ENABLED profile option to be enabled. When you enable this profile option, this is what happens:

- If the task is Manager Evaluation and the calibration status in Compensation is either In Review or Complete, managers see a message that conveys that the section ratings in the performance document are locked. Managers can still adjust comments and item ratings in the performance document to align with the calibrated ratings.

- If the task is Share Performance Document and the calibration status in Compensation is set to In Review, managers won't be able to complete the share task. After the calibration status is set to Complete, managers can continue to share their evaluation with the employee.
- Previous configuration options for locking the share task aren't available when this profile option is enabled:
 - The Allow document sharing task to be locked for calibration configuration doesn't display in Performance process flows.
 - The Lock Manager Share Task isn't available for Document Periods in the performance template.

FAQs for Overview and Integrations

How can I diagnose any issues with Oracle Fusion Performance Management data?

Run the Performance Management Integrity Validations test. In the global header of the Diagnostic Dashboard, select Settings and Actions - Troubleshooting - Run Diagnostic Tests. The test generates a report identifying invalid rows, which you can repair or remove.

The test validates that:

- Business groups are valid and exist.
- Foreign key attributes aren't null.
- Field level attributes match the business rules set up in Performance Management.
- Row counts on setup tables are greater than zero.
- Data in the setup tables matches the business rules set up in Performance Management.
- Data in the document tables matches the business rules set up for evaluations in performance documents.

3 Personalization Using Transaction Design Studio

Use Transaction Design Studio to Configure Field Displays

Use the Transaction Design Studio (TDS) to configure transactions and pages for responsive applications. TDS is available within the HCM Experience Design Studio.

You can control the visibility of attributes that are displayed either as **Delivered** or **Enabled**, and the availability of fields and sections of a transaction based on the user's role, person's business unit, or legal employer.

By default, the responsive pages display the often used attributes and hide the less often used attributes. Use Page Composer to personalize the responsive pages and display the attributes and tabs delivered within the feature.

Here's how you start HCM Experience Design Studio:

1. Sign in to the application as Human Capital Management Application Administrator with Access HCM Page Configurator (HRC_ACCESS_HCM_TRANSACTION_CONFIGURATOR_PRIV) privilege. This privilege provides you access to TDS in HCM Experience Design Studio.
2. Enable a sandbox to compose data for configuring business objects. On the Home page, click the **HCM Experience Design Studio** quick action under the **My Client Groups** tab.
3. Under **Settings and Actions**, click **Edit Pages**.
4. Select the site layer and click **OK**.

Related Topics

- [Overview of Page Modification](#)

How You Configure Performance Pages Using Transaction Design Studio

Use Transaction Design Studio (TDS) to create rules for configuring Performance pages. You can include or hide fields as needed by your organization. Some fields aren't available to change and don't display in TDS because they're controlled by configurations or available data.

For the Performance Document Action, you can set up a rule to apply to a specific performance document, giving you an extra layer of control for each performance document your organization uses.

Actions

This table shows the actions that you can use to configure Performance pages and the page for which the action applies.

Action	Page
Performance Document	Performance Document
Performance Management	Other Performance pages

Did you know that you can create multiple rules for an action?

You can select different regions in the Page Attributes section and set the visibility of the different attributes listed in the UI.

Related Topics

- [Use Transaction Design Studio to Configure Field Displays](#)

Display Sort Options for Performance and Anytime Documents

You see the performance and anytime documents on the employee's spotlight page in an order determined by the sort field.

The default is date, with the latest displaying first, to the oldest displaying last. You can change the default sort order to any of these options:

- Date - Latest to Oldest (default)
- Date - Oldest to Latest
- Name - A to Z
- Name - Z to A

When you sort by name, use a naming convention for the performance documents that makes annual documents appear at the top of the page. If the Sort By field isn't displaying to users, then you can make it visible using HCM Experience Design Studio.

Before you start

Sign in to the application as Human Capital Management Application Administrator with Access HCM Page Configurator (HRC_ACCESS_HCM_TRANSACTION_CONFIGURATOR_PRIV) privilege. This privilege provides you access to TDS in HCM Experience Design Studio.

Here's what to do

1. Enable a sandbox and then edit your page at the site level.
2. Go to **My Client Groups > Quick Actions > HCM Experience Design Studio**.
3. From the **Actions** list, select **Performance Management**.
4. Click **Add** in the Rules section.
5. Enter the name and description in the Basic Details section. Select the **Active** check box to make the rule ready to use.

6. In the Page Attributes section, select **Performance and Anytime Documents List**.
7. Set the Sort By attribute to **Visible**.
8. Click **Save and Close**.
9. Go to the employee's performance spotlight page, and view the sort options.

FAQs for Personalization Using Transaction Design Studio

How can I provide more information to managers on the Evaluate Performance page?

You can display an information banner on the Evaluate Performance search page to help managers use the necessary filters to view the performance documents they want to manage.

The banner conveys this information:

By selecting the **All Evaluatees** filter, managers can see surrogate performance documents when they're not the managers on an employee's assignment. They can also use the **Business Title** option that appears on the top of the Evaluate Performance page to see other performance documents they manage under other assignments.

Note: The **Business Title** option appears only if a manager has multiple assignments.

You can personalize the banner text using the User Interface Text tool.

To display this information banner, follow these steps:

1. Enable a sandbox and then edit your pages at the Site level.
2. Go to **My Client Groups > Quick Actions > HCM Experience Design Studio**.
3. From the Action list, select **Performance Management**.
4. Click **Add** in the Rules section.
5. Enter the name and description in the Basic Details section. Select the **Active** check box to make the rule ready for use.
6. In the Page Attributes section, select **Evaluate Performance** from the Region list.
7. Set the Page Information Banner attribute to **Visible**.
8. Click **Save and Close**.

When you go to **My Team > Performance**, you can view the banner.

Related Topics

- [Overview of Page Personalization Tools](#)

How can I display additional participant categories when managing participant feedback for a performance document?

Enable managers and HR specialists to select participants when managing participant feedback.

They can select from these categories:

- Worker's peers
- Worker's matrix managers
- Worker's directs reports
- Suggested list of participants based on who they selected previously

To do so, configure the Add Participants page under Manage Participant Feedback.

1. Enable a sandbox and then edit your pages at the site level.
2. Go to **My Client Groups > Quick Actions > HCM Experience Design Studio**.
3. From the **Action** list, select **Performance Document**.
4. In the Rules section, click **Add**.
5. In the Basic Details section, enter a name and description for the rule.
6. Select the **Active** check box to make the rule ready for use.
7. Select the performance documents to which the rule applies.
8. Select **Add Participants** from the **Region** list.
9. Set the following attributes to **Visible**:
 - Suggestions
 - Peers
 - Direct Reports
 - Matrix Managers
10. Click **Save and Close**.

Can I display notes and additional information when evaluating goals?

You can use Transaction Design Studio to display or hide additional attributes for a goal in the Evaluate pages. You can display the category, success criteria and comments for both performance and development goals.

You can also choose to display notes for both performance and development goals in the Show Additional Info region in the Evaluate pages.

4 Questionnaires

Questionnaires

You can create questionnaires to gather information in applications that support them. For example, you can use questionnaires to collect feedback in a performance evaluation.

A questionnaire consists of several questions, and you create questionnaires based on questionnaire templates. You can create questions using the question library and then add the questions to questionnaire templates and questionnaires. This topic describes aspects of questionnaire creation and maintenance.

You create and update questions, questionnaire templates, and questionnaires from the Setup and Maintenance work area.

To access this work area, click the arrow next to your photo on the global header, open the **Settings and Actions** menu, and select **Setup and Maintenance**.

Next, select **Workforce Development** from the Setup list, and select **Questionnaires** from the Functional Areas list.

Using these tasks, you can configure each of these sections:

- Question Library
- Questionnaire Templates
- Questionnaires

Subscriber Applications

Applications which are eligible to use questionnaires are called subscriber applications. In addition to Oracle Performance Management, other subscriber applications include Oracle Learning, Oracle Time and Labor, Oracle Recruiting, and many more. You must select the subscriber application for each questionnaire. When you select the subscriber on the Questionnaires page, you can create questionnaires for the selected subscriber only. In addition, the subscriber filters your search results to display only questionnaires created for that subscriber.

Note: Some subscriber applications use Setup and Maintenance tasks to manage questionnaire components while others provide their own tasks or don't allow modification of questionnaires. See the documentation for the subscriber applications for more information.

Folders

You maintain folders to store questionnaires. For each subscriber application, you can create as many folders as required to differentiate or identify the questionnaires.

Questionnaire Templates

All questionnaires are based on templates, which promote consistency. When creating a questionnaire, you must select a template on which to base the questionnaire. The template can provide default settings or enforce mandatory

requirements such as specific sections and questions that must be in all questionnaires created using the template. You can configure templates for:

- Specific applications
- General audiences, such as an entire organization or all internal customers
- Targeted audiences, such as particular roles (managers, for example)
- Specific purposes, such as providing feedback for performance evaluation periods or rate worker potential in an assessment for a talent review

You can create questionnaires only from templates that were created for the same subscriber as the questionnaire.

Questionnaire Presentation

You can specify how the questionnaire appears in the subscriber application. For example, you can:

- Add sections to group questions by type or other classification.
- Define the question order to appear in the sequence defined or in random order in a section.
- Mark questions as required.

When a section is defined for Random question order, you can specify the sample size that isn't less than the required number of questions and more than the number of questions in the section.

Note: Conditional questions aren't included in the random sample questions.

Questionnaire and Question Scoring

For subscriber applications that support scoring, you can configure questions that score the responses provided by respondents. You can configure questionnaires to calculate the cumulative total of responses (Sum), the average score, or the percentage based on the maximum available score.

Tip: You can define a high score for a question that can be more than 3 digits. This facilitates to have higher number of questions with each of these questions having higher scores in a questionnaire. Thus, the high score can result into an overall high score too.

You can define the score for question answers directly in each questionnaire. For questions that are reused across multiple questionnaires, you can define a different score for the question in each questionnaire. If you don't change the question score in the questionnaire, the default score from the question is used.

Questionnaire and Template Access

You can control access to questionnaires and templates by setting privacy options. If you set the **Privacy** option to **Private**, only the named owner can edit the questionnaire or template. Otherwise, anyone with access can edit the questionnaire or template.

How You Create Questions

When creating a question, you specify the question type, additional instructions about the question, images and attachments, if any, response type for the question, scoring options, and more.

You create questions in the question library. To create, review, or edit questions, select these in the Setup and Maintenance work area:

- Setup: **Workforce Development**
- Functional Area: **Questionnaires**
- Task: **Question Library**

Follow these steps to create a question, for example:

1. After selecting the options mentioned above, select the subscriber from the Questions page.
2. Click the **Create** icon. The Create Questions page appears.
3. Select the folder, status, and privacy options, as required. The Question Code and Question Version Number are generated automatically.
4. In the **Question Text** field, type the question that you want to ask. For example, "How many states are there in the US?"
5. In the **Image** field, click the **Manage Attachments** icon to add an accompanying image to the question. For example, if your question reads, "What does this sign mean?", add the image of a sign in this field.
6. In the **Instructions** text box, include additional information or provide additional context about the question. You can format the information that you add by using the toolbar. You can also add an URL using the **Add Link** icon on the toolbar.

Note: The URL that you add here will open in the same window as the questionnaire. You may want to add a note in the **Instructions** text box to let the respondents know that they must open the URL in a new window to avoid losing any unsaved changes.
7. Select the question type. Options are **Text**, **Single Choice**, **Multiple Choice**, and **No Response**.
8. Select the **Display the question conditionally** check box if you want to display the question based on a specific response that's provided to another question called the controlling question. For example, if respondents answer "No" to a controlling question such as, "Are you happy with the learning module?", you can configure a text question to appear conditionally, asking them to provide more details. For more information, refer to the Conditional Questions section in this topic.
9. For Single-Choice and Multiple-Choice question types, you can provide scoring options by selecting the **Score Question** check box.

For more information, refer to the Response Scoring section in this topic.
10. Select the type of response that a respondent must provide to the question. Each question type has a list of response types that you can choose from.
11. To allow respondents to upload attachments with their responses, select the **Allow Attachments** check box. For example, you have the question, "Provide proof of the right to work in this country". The respondent can upload an attachment to show proof of the right to work.

Note: Respondents can add attachments for all types of questions, including **No Response** questions.
12. Select the **Allow Additional Comments** check box, if you'd like respondents to provide additional comments or reasons for their responses. This option is available only for **Date** responses of the **Text** question type and for all responses of the **Single Choice** and **Multiple Choice** question types.

Note: When you create a new version of a question or copy a question that has additional comments enabled, this option is available in the new question as well. However, it's not available for existing questions that are already published. This option may not be available in certain run-time and setup pages in Oracle Recruiting, Oracle Health and Safety Incidents, Wellness, and Journeys.

13. In the **Minimum Length** and **Maximum Length** fields, specify the length of text responses, or the start and end dates of date responses.
14. Click **Save and Close**.

Question Types

Four types of questions are available in the **Question Type** list:

- Text
- Single choice
- Multiple choice
- No response

For each question type, you also configure responses and select a presentation method. For example, for single-choice questions, you can specify that the possible responses appear either in a list or as radio buttons.

This table describes the types of questions and their response types.

Type	Description	Sample Question	Response Type	Sample Response	Notes
Text	Respondents can either enter free-form text as the answer to the question, or they can enter a date using a date picker.	How can we improve this class?	• Date • Plain Text Box • Rich Text Box	The class is too long and should be broken into 2 half-day classes.	For text responses, you can specify the minimum and maximum number of characters. You can also allow rich text that uses formatting, such as bold and underline. For date responses, you can set the minimum or maximum dates, or both. Respondents must choose a date on or before the maximum date and on or after the minimum date. For example, if respondents have to enter their date of joining between 12/01/2021 and 12/31/2021, set these as the minimum and maximum dates.
Single Choice	Respondent chooses only one correct answer.	Is Performance Management a subscriber application for questionnaires?	• Single Choice from List • Radio Button List	Yes	

Type	Description	Sample Question	Response Type	Sample Response	Notes
			- Radio Button with Image - Single Choice – Horizontal Buttons (applicable only for Touchpoints and Journeys Surveys subscribers)		
Multiple Choice	Respondent can choose more than one answer.	Which applications are subscriber applications for questionnaires?	- Check Multiple Choices - Check Box with Image - Multiple Choices from List - Multiple Choice – Horizontal Buttons (applicable only for Touchpoints and Journeys Surveys subscribers)	Oracle Performance Management, Oracle Learning, Oracle Health and Safety, Oracle Recruiting	
No Response	Instructional text only; no response is allowed.				Attach any supporting documentation that relates to this person's performance for this period.

Subscriber Applications

Subscriber applications are applications that can use questionnaires, for example, Oracle Performance Management. When creating a question, you must select a subscriber application for the question and a folder in which to include it. You can create folders for each subscriber application to store questions for the subscriber. For example, folders for Oracle Recruiting might be named for locations, where the organization has offices, such as San Francisco, Austin, Los Angeles, Tokyo, Bangalore, and Shanghai. A question is only available to questionnaires with the same subscriber.

Conditional Questions

When you select the **Display the question conditionally** check box, you need to specify the controlling question code and response. When the respondent answers the controlling question with the controlling response, the conditional question appears.

For example, for a controlling question such as, **Did you receive assistance with this form?**, if the controlling response is **Yes**, then you can display the conditional question, **Which type of assistance did you receive?**

Note: Add both the conditional question and the controlling question to the same section of the questionnaire.

You can also add response feedback visible to respondents to display a targeted message to their response, if the subscribing application uses response feedback.

Tip: You can assign your own response codes to the responses that you create in choice-based questions. The application provides the response code by default. But you can remove the response code and enter a code of your choice so that it's meaningful and helpful in organizing your setup. If you enter a response code, please note the code must be unique for the entire set of responses across all questions and not just for a specific question. For example, you can only have one response code, "Yes" across all your questions.

Single-Choice and Multiple-Choice Questions

For single-choice questions, respondents select one response from several. You specify whether the responses appear in a list or as radio buttons. An example of a single-choice question is, "Have you completed a similar class?" Only one response for the options is expected, Yes or No.

You can select a rating model to quickly provide consistent responses. When you select a rating model, the rating levels appear as responses. For example, you create the questions "How do you rate your performance in this performance period?" and you associate the Performance Rating Model, which has 5 rating levels defined as Outstanding, Exceeds Expectations, Meets Expectations, Inconsistent, and Unsatisfactory. These 5 rating levels are automatically added as the response choices for the questions. You can add, remove, or edit the responses. If you change the rating model, for example, to the Language Rating Model, which has 3 ratings (High, Moderate, Low), the response choices will change, but the text for the question stays the same unless you edit it.

You can add feedback to display messages to users reviewing a completed questionnaire if the subscribing application has enabled this feature. The response feedback appears when the respondent submits the questionnaire.

When you configure a single-choice question as a radio button and specify that it isn't required, the **No opinion** response appears automatically as a response. This option allows respondents to change their responses to no opinion if they already selected a response that they can't deselect.

For multiple-choice questions, respondents can provide one or more answers. Specify whether the responses are presented as check boxes or a choice list. You can set both a minimum and maximum number of required responses. As with single-choice questions, you can associate a rating model with the response type. You can add responses to multiple-choice questions, as with single-choice questions. An example of a multiple-choice question is "Indicate which of the following grades you have taught. Select all that apply." A respondent can check grade levels, such as Kindergarten, first, second, third and so on.

Tip: You can assign your own response codes to the responses that you create in choice-based questions, single-choice or multiple-choice. You can assign meaningful identifiers to the questions by using your own question codes. If you don't want to, you can use the application-generated codes.

For choice-based question responses, you can add images when defining the response. To do this, enable one of these options in the **Allow Response Types** section of the questionnaire template:

- Check box with image
- Radio button with image

Outside the questionnaire, when defining an independent question, you can add an image to any type of question. For responses to choice-based questions, ensure that you select one of these options for **Response Type**.

- Check box with image

- Radio button with image

Response Scoring

You can configure single- and multiple-choice questions to be scored. To score the responses, you can either set them up to use user-defined scoring or select a rating model to use the predefined numeric rating. Responses using rating models are only scored when the question is configured for scoring. The application uses the score from the responses to calculate the score of questionnaires that are configured to be scored. With the rating models, you can edit the short description and the score.

Note: For the Touchpoints subscriber, scoring is enabled by default as pulse scores can be computed and displayed as graphs in Oracle Touchpoints only if it's enabled.

Editing a Question

When you edit a question, you can either create a new version or update it. You can see the version number when you edit a question. However, the version number is incremented only when you create a new version of the question and not when you update an existing version.

When you create a new version of the question, it won't be automatically included in a questionnaire that's in use and referencing an older version of the question. To include the new version, you need to create a new version of the questionnaire and add the question.

Randomized Questions and Answers

Just as questions can be randomized in a questionnaire section, the answer choices can be randomized. Randomized questions and answers help prevent users from copying answers from others or memorizing questions and answers to share with others.

You can have two kinds of randomization:

- **Position Randomization** - This refers to the sequence of response choices for a given question. If 5 choices are available (a, b, c, d, e), the order in which these are shown to the respondent is randomized. For example, the choices can appear in the order e, d, c, b, a for one respondent. For another respondent, the choices can appear in the order a, c, b, e, d.
- **Selection Randomization** - This refers to randomizing the response choices shown to the respondent from an available list of choices. For example, you set up a question that has a sample of 10 answer choices. You can show 5 random choices from the list of 10. The correct answer or answers are always included in the selection shown to the respondent.

You can set up single- and multiple-choice responses in random response order.

In addition to randomization in questions and answers, you can randomize the *order of sections* in a questionnaire.

Put Your Sections, Questions, and Answers in Random Order (Position Randomization)

This shows how to put sections and questions in random order. Optionally you can also put answers in random order.

1. Go to the **Settings and Actions** menu.
2. In the Administration area, select **Setup and Maintenance**.

3. From **Setup**, select **Workforce Development > Questionnaires**.
4. Search for or create a questionnaire. Note that you can't edit a questionnaire if it's in **Active** status.
5. Select the **Subscriber**, for example, Performance 360.
6. If needed, edit the Basic information and click **Next**.
7. For the **Section Order**, select **Random**.
8. In the Sections area, under the **Question Order** column, select Random.

Note: You can achieve position randomization for *answers* when you select **Random** for the **Response Order** in the Sections area.

Put Your Answers in Random Order (Position Randomization)

This shows how to make the answers for a single **question** appear in random order.

1. Go to the **Settings and Actions** menu.
2. In the Administration area, select **Setup and Maintenance**.
3. From **Setup**, select **Workforce Development > Questionnaires**.
4. On the right side of the page, click **Question Library**.
5. Select the Subscriber, for example, Performance 360. If you have multiple libraries, select a specific library.
6. Search for or create a question. Note that you can't edit a question if it's in **Active** status.
7. In the Response area, select **Random** for the **Response Order**.
8. Enter a Sample Size that matches the number of answer choices that you define for the question. Sample size determines the number of answer choices shown to the respondent.
9. Enter the possible answers in the table by clicking the **Add** icon. Make sure that you enter the correct answers in the table and indicate they're correct by selecting **Yes** in the **Correct Response** column.

When the sample size matches, position randomization is enabled.

Create a Question with Randomized Answers (Selection Randomization)

This shows how to enable a higher level of randomization by randomizing the answer choices shown for a question.

1. Go to the **Settings and Actions** menu.
2. In the Administration area, select **Setup and Maintenance**.
3. From **Setup**, select **Workforce Development > Questionnaires**.
4. On the right size of the page, click **Question Library**.
5. Select the Subscriber, for example, Performance 360. If you have multiple libraries, select the library.
6. Search for or create a question. Note that you can't edit a question if it's in **Active** status.
7. For the **Question Type**, select **Multiple Choice** or **Single Choice**.
8. For the Response order, select **Random**.
9. Enter the **Sample Size** for the answers. Sample size determines the number of answer choices shown to the respondent.
10. Enter a number in the **Minimum Number of Selections**, for example, 1. The minimum number of selections determines how many choices the respondent must select at the minimum.
11. Enter a number in the **Maximum Number of Selections**, for example, 2. The maximum number of selections determines the number of correct responses that will be shown to the respondent in the choices presented.
12. Enter the possible answers in the table by clicking the **Add** icon. Make sure that you enter the correct answers in the table and indicate they're correct by selecting **Yes** in the **Correct Response** column.

Example of a Question with Randomized Answers

Question Details	Notes	Sample Information
Question text		Which of these countries is in Asia?
Question type		Multiple Choice
Response order		Random
Sample size	Number of choices shown to the respondent	6
Minimum number of selections	Number of choices the respondent must select	1
Maximum number of selections	Number of <i>correct</i> responses that will be shown to the respondent	2
Number of correct answers		2

In the answer table, you enter the responses and indicate which are the correct ones.

Short Description	Correct Response
India	Yes
South Korea	Yes
France	No
Columbia	No
Zimbabwe	No
Lebanon	No
Canada	No
New Zealand	No
Ethiopia	No
Greenland	No

Because you set the sample size as 6, the respondent will see 6 possible answers.

Which of these countries is in Asia?

1. France
2. South Korea
3. Zimbabwe
4. India
5. Greenland
6. Ethiopia

Because you set up selection randomization, another respondent might see the question with different responses, such as:

Which of these countries is in Asia?

1. Lebanon
2. India
3. New Zealand
4. France
5. Columbia
6. South Korea

How You Configure Questionnaire Templates

This topic describes how questionnaire template options determine the features of questionnaires. After creating a questionnaire from a template, you can override or change some of these options in the questionnaire.

To create a questionnaire, go to the Setup and Maintenance work area, and select these options:

- Setup: **Workforce Development**
- Functional Area: **Questionnaires**
- Task: **Questionnaire Templates**

Click **Create** in the Questionnaire Templates page that appears.

Questionnaire Scoring and Calculation Rules

You can select **Score Questionnaire** to configure the questionnaire to calculate scores based on responses. Questionnaires made from the template can then be scored. However, it's not always necessary that a questionnaire created from a scored template has to be scored. To score a questionnaire, you must also select the overall score calculation rule that specifies the formula used to calculate scores.

Note: Scoring only applies to subscriber applications that allow scoring. For the Touchpoints subscriber, scoring is enabled by default as pulse scores need to be computed and displayed as graphs in Oracle Touchpoints.

If you edit the template and deselect **Score Questionnaire**, existing questionnaires created from the template aren't affected. Only questionnaires created in the future from the template aren't scored.

Section Presentation and Order

A questionnaire has at least one section. You can use sections to group questions by type or category, for example.

The **Section Presentation** option controls how the questionnaire uses sections. This table describes the Section Presentation values.

Value	Description
No Sections	One section appears that contains all questions.
Stack Regions	Multiple sections appear as specified on the Section Order option.

The **Section Order** option controls section order. This table describes the **Section Order** values.

Value	Description
Sequential	One section appears that contains all questions.
Random	Each respondent views the sections in a different order. Reviewers view the sections in sequential order to provide consistency when reviewing responses.

You can specify whether questionnaires based on this template can override these values.

Allowed Response Types

The **Allowed Response Types** controls the types of questions that are included in a questionnaire template. However, this doesn't limit users from adding questions with other response types to a questionnaire created from this template.

Sections

The **Allow Additional Questions** option controls whether authorized users can add questions in the subscriber application. For example, for performance documents, that could be managers or workers.

If you select the **Required** option, then respondents must answer all questions in the section.

Question and Response Order

The **Question Order** and **Response Order** values control the order that questions and possible responses appear to a respondent. Response order only applies to single-choice and multiple-choice questions, which contain a list of responses.

This table describes the Question Order and Response Order values.

Value	Description
Vertical	Questions appear in the specified order.
Random	Each respondent views the questions in a different order. Reviewers view the questions in sequential order to provide consistency when reviewing responses.

You can override the default values of these options for individual sections. You can also specify whether questionnaires based on this template can override these values.

Questions and Responses in Sections

In the Questions section, you manage questions for a selected section. You can:

- Add questions from the question library. You can change the response type for these questions after adding them to the template.
- Create questions, either those that are scored, or aren't. Questions you create become part of the question library. You must also add the question to the section after creating it from the section.
- Edit questions. Your edits are also reflected in the question library.
- Remove questions.
- Change question order by dragging them in the section. Questions appear in this order in the questionnaire if question order is **Vertical** for the section

If the section itself isn't required, then you can mark individual questions as required. Otherwise, respondents must answer all questions.

Note: You can't change the response type to **Plain Text** or **Rich Text** for questions that were originally created to accept date responses. Similarly, you can't change the response type to **Date** for questions that were originally created to accept text responses.

Review

As the final step, you can review the sections, questions, responses, response feedback, and test scoring, before saving the questionnaire template.

Note: Once a questionnaire is created from a template, you can't delete the template. But you can inactivate the template.

How You Create a Questionnaire

This topic explains how to create a questionnaire for incidents by selecting a questionnaire template and specifying relevant information in the questionnaire. It also lists the points to consider while editing a questionnaire. Note that for inspections, you can also create a basic questionnaire from the Inspection Items page. For more information, see the Manage Inspection Items topic.

Select the Questionnaire Template

In the Setup and Maintenance work area, select these options:

- Setup: **Workforce Development**
- Functional Area: **Questionnaires**
- Task: **Questionnaires**

If you use Performance Management, you can also go to **My Client Groups > Performance > Questionnaires**.

1. In the **Folders** section of the Questionnaires page, select the subscriber application for the questionnaire, for example Performance 360, Recruiting, or Learning Assessments.
2. In the **Search Results** section, click **Create**.
3. Enter **Questionnaire Template ID** or **Name** values, if available. Alternatively, click **Search** to list all available templates.
4. In the **Search Results** section, select a template and click **OK**.

Enter Questionnaire Basic Information

1. A unique numeric questionnaire ID appears automatically. You can change this value.
2. If this is a scored questionnaire, an overall score calculation rule appears. You can select a different rule.
3. Enter a **Name** and select a **Folder**. Use folders to organize questionnaires by type or purpose.
4. Leave the **Owner** field blank and the **Privacy** value set to **Public** if anyone who can access the questionnaire can edit it. Otherwise, select an owner and set **Privacy** to **Private**.
5. Leave the **Status** value set to **Draft** until the questionnaire is ready.
6. For the Touchpoints and Journey Surveys subscribers, select a pagination option from the **Display Format** list.

Note: When you display one section per page, section instructions, if any, appear below the section title. When you display all questions on a single page, questionnaire instructions and section instructions appear below the respective titles.

7. In the **Instructions and Help Materials** section, enter and format any instructions for questionnaire users. This text appears at the top of page one of the questionnaire.
8. Add file or URL attachments, if appropriate. Links appear at the top of the questionnaire and beneath any instruction text.
9. Click **Next**.

Enter Questionnaire Contents

The **Section Order** and **Section Presentation** values are as specified in the questionnaire template, for example, **Sequential** as the **Section Order** and **Stack Regions** as the **Section Presentation**. Depending on template settings, you may be able to change these values. Depending on template settings, you can edit some or all section settings. You can also delete predefined sections and create additional sections.

1. Select the first section to view its questions in the **Questions** section. You can delete a question or change its response type and **Required** setting.
2. If you create additional sections, you add questions to them. In the **Questions** section, click **Add**. Search for a question, select it, and click **OK**. The question is added below the question that appears highlighted in the Questions section. You can reorder the questions by dragging them by the expandable arrow that appears in the first column and dropping them in another row.

Note: You can view the version number of the question in the Search Results section. If this column doesn't appear, click the **View** menu and select **Columns > Question Version Number**.

3. You can also create questions for a section. Select a section, and in the **Questions** section, click **Create**.
4. Select the **Folder**, and enter question and response details, and click **Save and Close**. The question becomes available in the question library as well. Add the question to the section using the instruction in step 2.

5. Edit questions as required. Select a question and click **Edit**. Enter question and response details, and click **Save and Close**. The question is updated in the questionnaire and the question library.

Note: Although you can override the response types for questions while defining a questionnaire, you can't change the response type to text for questions that accept date responses or change the response type to date for questions that accept text responses.

6. When all sections and questions are complete, click **Next**.
7. Click **Preview** to preview the questionnaire. For scored questionnaires, click **Test** to verify the scoring.

Note:

- When you click **Reset** after testing, the previously filled responses are retained in the questionnaire. This allows you to modify specific responses as per your needs and test the behavior of the questionnaire again.
- The questions in a section are displayed in the order specified in the **Section Order** field.
- Questionnaire surveys that are created for both Touchpoints and Journey Surveys subscribers are distributed to respondents using the Journeys application. So, when you preview the questionnaire survey in ADF-based pages, the response options appear in a drop-down list. However, when you view the survey in the Journeys application, you can see the horizontal button responses and the question display format that you've chosen.

8. Click **OK** and then click **Save**.

Note: If a questionnaire isn't in use, you can still add new questions that accept date response types, or create a new version of the questionnaire to add such questions. When you edit the response type for a question in a questionnaire that isn't in use, the updated response type is reflected in the questionnaire definition.

Editing a Questionnaire

To edit a questionnaire, go to the Questionnaires setup page, and select a questionnaire from the Search Results section and click **Edit**.

A few points about editing a questionnaire:

Set the questionnaire **Status** value to **Active** when the questionnaire is ready for use.

If a questionnaire isn't in use, you can still add new questions that accept date response types, or create a new version of the questionnaire to add such questions. When you edit the response type for a question in a questionnaire that isn't in use, the updated response type is reflected in the questionnaire definition.

You no longer need to go into the edit mode to preview a questionnaire. You can preview it from the Search Results section of the Questionnaires setup page. You can preview draft, active, and inactive questionnaires.

Related Topics

- [What happens if I edit a questionnaire that's in use?](#)

Question Scoring Setup Options

For eligible subscriber applications, you can configure questions to calculate a score based on responses. This topic describes aspects of creating questions that can be used to score questionnaires.

Use the Question Library task in the Setup and Maintenance work area for this task.

Eligible Question Types

Two question types are eligible for scoring:

- Single choice
- Multiple choice

If you select single choice, the question score is the value of the selected response. For multiple-choice questions, the total value of all selected responses is the question score.

Score Question

To score the question, select **Score Question**. Scored questionnaires use scored questions to determine the questionnaire score. You set the default calculation rule in the template, but this can be overridden in the questionnaire.

If a question is in use, you can't change whether it's scored or not. To create a scored question, create a new question or copy an existing question.

You can add scored questions to questionnaires that aren't scored. In questionnaires that aren't scored, response scores aren't available.

Tip: Use the Preview feature to ensure that the scoring works as you anticipated.

Minimum and Maximum Calculated Scores

For multiple-choice questions you can define either, or both, minimum and maximum calculated scores. These are the maximum and minimum scores the question can attain, regardless of how many responses the respondent selects, or the score of the responses.

You can define the maximum and minimum calculated scores to keep them within a range that aligns with your business process. For example, you can set maximum and minimum scores to ensure that:

- Questions in a questionnaire have consistent maximum and minimum values
- Questions aren't weighted too heavily with either too high a positive or too low a negative score

If you don't define the maximum calculated score or maximum number of responses, the maximum possible score is the sum of all responses. When you update the score of a question, the maximum possible score of the questionnaires that include this question are automatically updated, provided they aren't in use. However, if you have the scores overridden for these questions at the questionnaire level or if the questionnaire is in use, then these scores will remain unaffected by your updates to the question score.

Response Configuration

To provide responses for users to select, you must add responses. You can then specify additional configuration for the responses.

Minimum and Maximum Number of Selections

For multiple-choice questions, you can optionally define the minimum and maximum number of selections that respondents make to the question. If respondents don't select the specified number of responses, an error message appears.

Short Description

When you add responses, you can define the score for the response. You must enter a short description, which appears to respondents. You can enter any score for the response and as many responses as your business process requires.

The scores can be the same or varied. For example, you can have five responses with 5 as the score for each. Or, you can have five responses with values of 1, 2, 3, 4, and 5.

Tip: After adding responses, use the Preview feature in the questionnaire to ensure that the list of responses isn't too long for respondents to view effectively.

Rating Model

You can select a rating model to provide a predefined short description and score. However, you can edit both the short descriptions and scores.

Response Feedback

You can add feedback to display messages associated with the responses selected by the respondent. This feedback may appear to the respondent or to a reviewer depending upon configuration in the subscribing application.

Preview

Use the **Preview** feature in the Questionnaire to review the questions and responses in the questionnaire. Select answers and click **Test** to see the resulting score and any response feedback. Click **Reset** to clear the scores and test again.

Related Topics

- [How You Configure Questionnaires for Questionnaire Scoring](#)

How You Use Translation Editor with Questionnaires and Questions

You can translate questionnaire templates, questionnaires, and questions using the translation editor. With the translation editor, you can review and translate text for more than one language at a time without signing out of your current session.

For each translatable field, the translation editor helps to ensure your data is translated the way you intend. The translations appear wherever the questionnaire templates, questionnaires and questions appear.

Eligible Languages

The languages that you can translate are those that are installed and active in the application. The translated text appears in the application for the respective language a user selects when signing in.

Text that Can Be Translated

Using the translation editor, you can translate any text fields that you can edit in questionnaire templates, questionnaires, or questions. For questionnaires and templates, you can translate:

- Name, description, and introduction
- Section title, description, and introduction

For questions, you can translate:

- Question text
- Question response short description
- Question response feedback

Translation Editor Usage

Click the **Translation Editor** icon to edit the translatable text in a questionnaire, questionnaire template, or question. The icon appears on the pages and sections where the fields you can appear. In the **Edit Translation** dialog box that appears, you can enter text for any available language for each field. The translated text appears in the application for the respective language a user selects when signing in. For example, if you translate a question from English to Spanish, a Spanish-speaking user sees the Spanish translation. If the translated text is in a language that's the same as the language of your current session, you can see the translation apply to the UI immediately.

When you create a new questionnaire, template, or question, you must first save it before using the translation editor. Once the object is saved to the database, the translation editor becomes available.

Translation Inheritance

Questionnaires inherit translations from the template. You can edit the translations to change them. Question translations that you configure are also inherited by that question if it's used later in another questionnaire or template. You can edit the translation either in the Question Library, or in the questionnaire or template in which it's used.

How You Use Questionnaires in Performance Documents

Create questionnaires to add to performance documents. These questionnaires gather feedback about workers from participants other than direct managers. Managers can use such feedback to help them evaluate workers.

Here's what you use questionnaires in performance documents for:

- Capture feedback in performance documents
- Collect information on a worker other than competencies and goals
- Configure questions for specific audiences and periods

To create questionnaires, go to **My Client Groups > Performance > Questionnaires**. From there you can also create Questions and Questionnaire Templates.

Instead of writing your own questions, you may want to see what questions have already been created. To go to the **Question Library** task, go to the Setup and Maintenance work area from the Settings and Actions menu:

- Offering: Workforce Development
- Functional area: Questionnaires
- Task: Question Library

Capture Feedback in Performance Documents

Using questionnaires allows your organization to get feedback from multiple sources. Such sources are the worker being evaluated, the worker's manager, peers, colleagues, other managers, internal customers, or any other role in the organization. This helps you get a wider view of a worker's performance. Managers can't use participant feedback captured in a performance document to rate workers in the performance document, but managers can use it to help determine how to rate workers.

Managers, workers, or both, manage participant feedback to select participants and assign them roles. Those roles determine which questionnaires the participants respond to.

Score Questionnaires Used in Performance Documents

You can enable scoring for a questionnaire when configuring a performance template. If you choose a questionnaire, use these options to configure the scoring on the Performance Template page:

- Use the **Processing by Role** section to select the roles that can view the scores. When you enable scoring for a role, persons having the role can see the scores and section weight in the questionnaire. The scores display to the user when they save or after they've submitted their evaluation.
- Select **Enable section weights** in the Weighting section to enable a section weight for the questionnaire section. Assign a section weight to be applied against the total score if it's considered in the overall summary rating calculation. You can assign a minimum section weight that the section weight can't be set lower than in the performance document.
- Select **Include total score in overall summary calculation** in the Scoring section to include the total score in the calculation of the overall summary rating.

Collect Information on a Worker Other than Competencies and Goals

You can use questionnaires to gather data about workers that isn't specifically about competencies and goals, thus increasing the range of information concerning the worker's performance and development.

For example, you can ask the manager or worker to do these actions:

- Identify strengths of the worker, or areas that require more development.
- Describe the top three achievements of the worker during the previous year.
- Discuss the worker's satisfaction in the current role.

Set up Questions for Specific Audiences and Periods

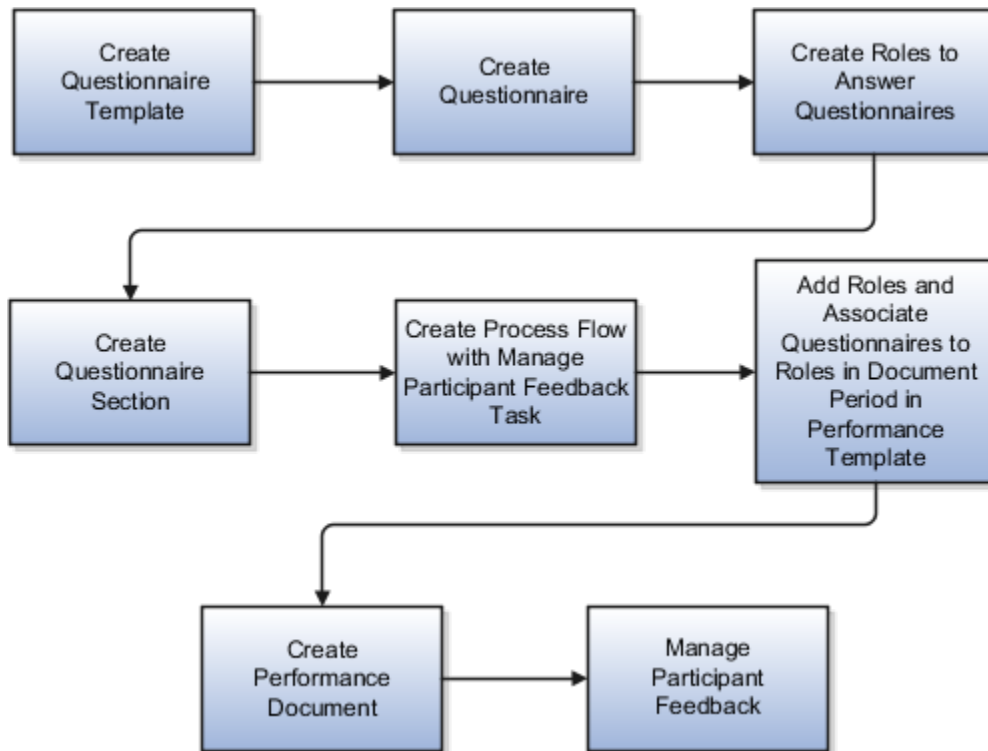
You can set up questionnaires to target general audiences, or specific groups, such as managers, workers, peers or other roles. You must associate questionnaires with performance template periods, and assign the roles that respond to the questionnaire. This enables you to create questionnaires that concentrate on specific periods, or can be used over multiple periods.

How Performance Documents Work with Questionnaires

You can add questionnaires to performance documents to enable participants to provide feedback during a performance evaluation.

To add questionnaires to performance documents, you must first create questionnaire templates and questionnaires, and configure the elements that make up a performance template to include questionnaires.

This figure illustrates the steps required to add questionnaires to performance documents and track feedback.



You manage questionnaire templates and questionnaires, questions, roles, process flow performance template sections and performance templates in the Setup Maintenance and Performance work areas. You manage participant feedback in performance documents in the Performance work area.

Go to **My Client Groups > Performance** to access these tasks:

- Questionnaire templates
- Questionnaires
- Questions
- Performance roles
- Performance process flows
- Performance templates
- Performance template sections
- Participant feedback

Except for Participant Feedback, these tasks are also available in the Setup and Maintenance work area:

- Offering: Workforce Development
- Functional Area: Questionnaires or Worker Performance

Questionnaire Template

Create a questionnaire template from which to create a questionnaire and assign Performance 360 as a subscriber application to make it available in performance documents. In the template, you can format the layout and questions to include in the questionnaires made from it. You can create as many questionnaire templates as needed.

Questionnaire

Create the questionnaire from an available template. Create as many questionnaires as required for your business process. For example, if your organization requires feedback from multiple roles, such as other managers, peers, or internal customers, you may need a different questionnaire for each role. You may also require different questionnaires for each performance evaluation period, or that cover all periods. You can edit questionnaires created from the template as required.

Roles

You must create all the roles that will access questionnaires in a performance document, with the exception of manager and worker, which are default roles. You associate roles with the questionnaire in the performance template to make them available to the role. Managers, workers, or both, select the roles that apply to each participant when managing participant feedback to determine which questionnaire a participant uses.

Section

Create a Questionnaire section to include in the performance document. The Questionnaire section is the only section type that can contain questionnaires. The questionnaire appears as a tab in the performance document. Add all the roles that will access the questionnaire to the section.

Process Flow

To make participant feedback available in a performance document, you must create a process flow that includes the Manage Participant Feedback task. Specify whether managers, workers or both, can manage and track participant feedback.

Performance Template

In the performance template you add the roles, process flow, and Questionnaire section that you created for the questionnaire. To the document periods you add the roles that you want to be able to access the questionnaire, and specify the questionnaire to associate with each role. Managers and workers can also be requested to answer questionnaires. To do so, you must add them to the document period.

In the template, you can also specify the minimum number of participants required to answer the questionnaire for each role, and a total minimum number of participants for each document. These settings are guidelines and aren't enforced.

Performance Document and Participant Feedback

After the performance document is created, the manager, worker, or both, can select participants, send requests for feedback, and manage the feedback. Depending on the settings in the questionnaire, managers or workers can add additional questions to the questionnaire. The ability to manage participant feedback is determined by the process flow settings.

Participants, other than workers and managers, can access the Questionnaire section of the performance document. Depending on how the performance template and process flow are configured:

- Participants can provide comments that appear in the Overall Summary section for managers and workers to review
- Workers and managers can access the Questionnaire section to view participant feedback

When the manager submits the performance document, the participant feedback is locked and participants can't add or edit feedback. Any feedback participants didn't submit before the document is locked won't be included in the performance document.

Export and Import of Questionnaire Data

Streamline the mass upload of Questions, Questionnaire Templates, and Questionnaires by using HCM Data Loader and HCM Spreadsheet Data Loader. Import any type of questions within the questionnaire, including the response choices in choice-based questions.

Note: You can import images for questions and responses and import attachments for questionnaire information using HCM Data Loader.

You can create questionnaire objects or manage the existing ones. You can load data for Questions and Question Answer Responses by using the Question data file. You can create questionnaire templates and questionnaires including the sections, questions, and answers that are a part of the questionnaire.

You can load the translation data of these business objects by using the translation data files. To use HCM Spreadsheet Data Loader in the Data Exchange work area, you need to first create a spreadsheet template, then upload it using the Load Spreadsheet Data task.

Related Topics

- [Overview of Loading Questions, Questionnaire Templates, and Questionnaires](#)
- [Guidelines for Loading Questions, Questionnaire Templates, and Questionnaires](#)
- [Examples of Loading Questionnaires](#)
- [Examples of Loading Questionnaire Templates](#)
- [Examples of Loading Questions](#)

What happens if I edit a questionnaire that's in use?

When you edit a questionnaire that's in use, you're prompted to either create a new version of the questionnaire or update the existing version.

When you update the questionnaire, the existing responses could become invalid. So it might be better to create a new version of the questionnaire.

Here's what happens when you update an existing questionnaire:

- If respondents answered questions and saved the questionnaire before the update, their saved responses continue to appear when they reopen the questionnaire after the update.
- The status remains **Active**.
- The questionnaire version remains the same.
- The **In Use** status is **Yes**.

Note: You can edit the questionnaire as needed, but it's best to limit the edits to those that have a minimal impact, such as changing text. Adding questions, marking questions as required, or changing responses to choice-based questions can result in issues for questionnaires that are already completed. This applies to questionnaires used in performance documents, anytime performance documents, requested feedback, and check-ins.

You can update these attributes in a questionnaire that's **In Use**:

- Name of the questionnaire
- Folder (category) of the questionnaire
- Owner
- Status
- Privacy
- Description
- Instructions
- Attachment for questionnaire
- Section order (if allowed from base questionnaire template)
- Section presentation (if allowed from base questionnaire template)
- Response order (positional randomization for answers)
- Name, description, and instruction text of section (if allowed from base questionnaire template)
- Position of questions (drag and drop feature is allowed)

The changes take effect as soon as you save the questionnaire. Respondents see the changed version in these scenarios:

- Creating a new performance document that includes a questionnaire
- Editing a questionnaire in a performance document that's in progress
- Reopening a previously completed performance document to edit the questionnaire
- Check-in documents always refer to the latest version of the questionnaire referenced in the check-in template. If you need a new version of a questionnaire for new check-in documents, it's recommended you create a new check-in template that includes a new questionnaire, instead of creating a new version of the existing questionnaire. This helps you preserve the questionnaire responses in existing check-in documents.

Here's what happens when you create a new version of a questionnaire:

- The previous version isn't affected.
- The status of the new version is set to **Draft**.
- The questionnaire version number increases by one.
- The **In Use** status is set to **Prior Version**.

When a questionnaire is completed using this version, the **In Use** status changes to **Yes**. The changes take effect when you set the status to **Active** and save the questionnaire. Respondents see the new version in these scenarios:

- Creating a new performance document that includes a questionnaire
- Editing a questionnaire in a performance document that's in progress:
 - If respondents answered questions and saved the questionnaire prior to the new version, their saved responses don't appear when they reopen the new version. Instead, they see the new version of the questionnaire.

- Reopening a previously completed performance document to edit the questionnaire.
 - The questionnaire version you see for completed performance documents before reopening is the version in which it was completed.
- Creating a new check-in document
- Opening an existing check-in document to edit the questionnaire
- Creating a new requested feedback
- Editing a questionnaire in requested feedback that's in progress:
 - If respondents answered questions and saved the questionnaire prior to the new version, their saved responses don't appear when they reopen the new version. Instead, they see the new version of the questionnaire.

What happens if I edit a question that's in use?

Editing questions when responses already exist can invalidate responses. It's recommended that you copy the question over to a new questionnaire and then make the changes you want.

5 Descriptive Flexfields

Descriptive Flexfields for Performance Management

You can use descriptive flexfields to add company-defined attributes for a Performance Management entity, and define validation and display properties for them.

For example, you can create a descriptive flexfield for a performance document to ask employees if they're willing to be a mentor. For more information on using flexfields for company-defined attributes, see the Oracle Fusion Cloud Applications Configuring and Extending Applications guide.

There are five descriptive flexfields available in Performance Management as listed in the table below.

Descriptive Flexfield Code	Description
HRA_DOC_TYPES_B	Additional fields for document type displayed on the Performance Document Type pages.
HRA_TMPL_DEFNS_B	Additional fields for performance templates displayed in General details on the Performance Template page.
HRA_EVALUATIONS	Additional fields for evaluation displayed in the Additional Info region of a performance document.
HRA_SECTION_DEFNS_B	Additional fields for sections displayed in the Performance Template Section page.
HRA_TMPL_SECTIONS	Additional fields for performance template section details displayed on the Structure tab in the additional information region of the Performance Template page.
HRA_EVAL_ITEMS	Not in use.
HRA_EVAL_RATINGS	Not in use.

Activate Descriptive Flexfields

To activate a descriptive flexfield, you must also define lookup codes and value sets along with the descriptive flexfield segment.

Related Topics

- [Overview of Descriptive Flexfields](#)
- [Overview of Flexfields](#)

6 Profile Options

Performance Management Profile Options

Set profile options to define the auto save interval, and automatically transfer performance documents to new managers.

You can change these options only at the site level.

Follow these steps to manage profile options using the Setup and Maintenance work area:

1. Open the **Settings and Actions** menu from your photo on the global header, and select **Setup and Maintenance**.
2. Select **Workforce Development** from the **Setup** list.
3. Click the **Tasks** icon and select **Search** from the list that appears.
4. Search for the **Manage Administrator Profile Values** task and select it from the search results area.
5. Search for the profile option code that you want to change. The profile option code and value appear in the search results area.
6. Edit the profile value as described in the following sections.
7. Specify the level at which the profile value is to be set. If the profile value applies to the entire site, select **Site**.
8. Click **Save and Close**.

Performance Autosave Interval

This table shows the profile option code and value that determine the auto save interval in performance documents.

Profile Option Code	Profile Display Name	Effect	Default
HRA_PERF_AUTOSAVE_INTERVAL	Performance Autosave Interval	Indicates the number of minutes before the performance document saves automatically.	10

Transfer Performance Documents Automatically

You can enable the transfer of performance documents from an employee's previous manager to the new manager. You can do this by configuring the profile option and selecting the manager type that should be transferred.

To enable automatic transfer, you need to perform these steps:

1. Set the Auto Transfer Performance Documents to New Manager profile option value to **Yes**. When enabled, the profile option enables you to select No transfer, Transfer for any manager type change, Line manager, or a custom manager type.
2. If an employee's manager with a selected type changes, any open performance documents that manager was the evaluator for are transferred to the new manager for the employee. If there's a manager change this is what happens:
 - o If there are multiple manager changes on the same day it checks for who the manager is at the time of processing. It doesn't process all previous manager records on the same day.
 - o If the employee has any performance documents that aren't started, or in-progress. It doesn't process the performance documents if the status is completed or cancelled.

- If the previous manager was the performance document manager.
- 3. Set the HRC_Disable_HCM_Events_Processing profile option to **N**. An event is triggered only if you change the manager, it isn't triggered if you delete the manager and add a new one.
- 4. Schedule the Transfer Performance Documents with Manager Change process. When run daily, the process determines if there are any manager changes with an effective date today or earlier which haven't been processed. It then transfers performance documents for those manager changes from the previous manager to the new manager according to the configured manager type. Notifications are sent for each performance document that's transferred to the new manager, if enabled.

Note: The application purges any data older than 180 days that's saved as a result of HCM Events.

Related Topics

- [Autosave Performance Documents](#)
- [Overview of Profile Options](#)

7 Performance Roles

Performance Roles

Create roles to expand the scope of the performance evaluation to include feedback from participants other than the worker and the worker's manager. To implement multiparticipant feedback, you must first define the roles that can participate in the process.

To create performance roles, go to **My Client Groups > Performance > Setup Maintenance > Performance Roles**.

To make roles eligible to provide feedback, you must:

- Define performance roles.
- Provide a description for the role.
- Make roles available for the performance document.
- Associate questionnaires to the roles when using questionnaires.

Define Performance Roles

You can create as many roles as required for the evaluation process that your organization employs. For example, you might have participant roles such as peer or mentor, or participant roles to facilitate a matrix management review. You may have additional manager roles used in performance templates where the default manager type isn't the line manager, such as, for project performance documents where the default manager is a project manager.

1. From the Performance Roles page, click **Create**.
2. Select the **Role Type**, either Manager or Participant.
3. If the **Role Type** is Manager, select Default Manager Type.
4. Enter the name of the **Role**, for example, Matrix Project Manager or Peer.
5. (Optional) Enter a description of the role.
6. Specify the **From Date** and **To Date**.

These dates have to overlap with the template dates to be valid for use in that template. For example, the role **From Date** can be before the template date, as long as the role **To Date** isn't before the template **From Date**. The role **To Date** can also be after the template **To Date**, as long as the role **From Date** isn't after the template **To Date**.

7. Select a status. The default is Active.
8. (Optional) If you want the role to be able to view worker and manager evaluations, click the check box **Allow role to view worker and manager evaluations**.

Participants with this role can view the ratings, comments, and questionnaires submitted by other roles that are also visible to the manager when they open the performance document from the My Feedback Requests page.

9. Click **Save**.

The seeded manager and worker roles are required; you can't delete or edit them. But you can create performance templates that don't require either the manager or worker role to answer a questionnaire or rate workers. In this case, you must add the role names to the template to permit the manager or worker to view feedback.

For example, you might create a performance template that includes the manager and participant roles only to gather feedback not visible to the worker. If you don't want the manager or worker to provide feedback, but do want them to

view feedback provided by others, you must still add the role names to the sections in the template to permit them to view the other feedback.

Provide a Role Description

Along with the role name, you can add a description for the role. The description appears on the Manage Participant Feedback pages.

Make Roles Available to Access the Performance Document

The participant roles you create, along with the manager and worker roles, are eligible to access the performance document to provide ratings and comments on content and feedback on questionnaires. You must select the roles in the performance template to enable them to access the performance document.

Associate Questionnaires with Roles

Each role is eligible to respond to only one questionnaire for each performance document within a review period. But you can assign more than one role to participants so they can complete more than one questionnaire. You associate roles with the questionnaires that the role uses in the performance template.

Participant Feedback

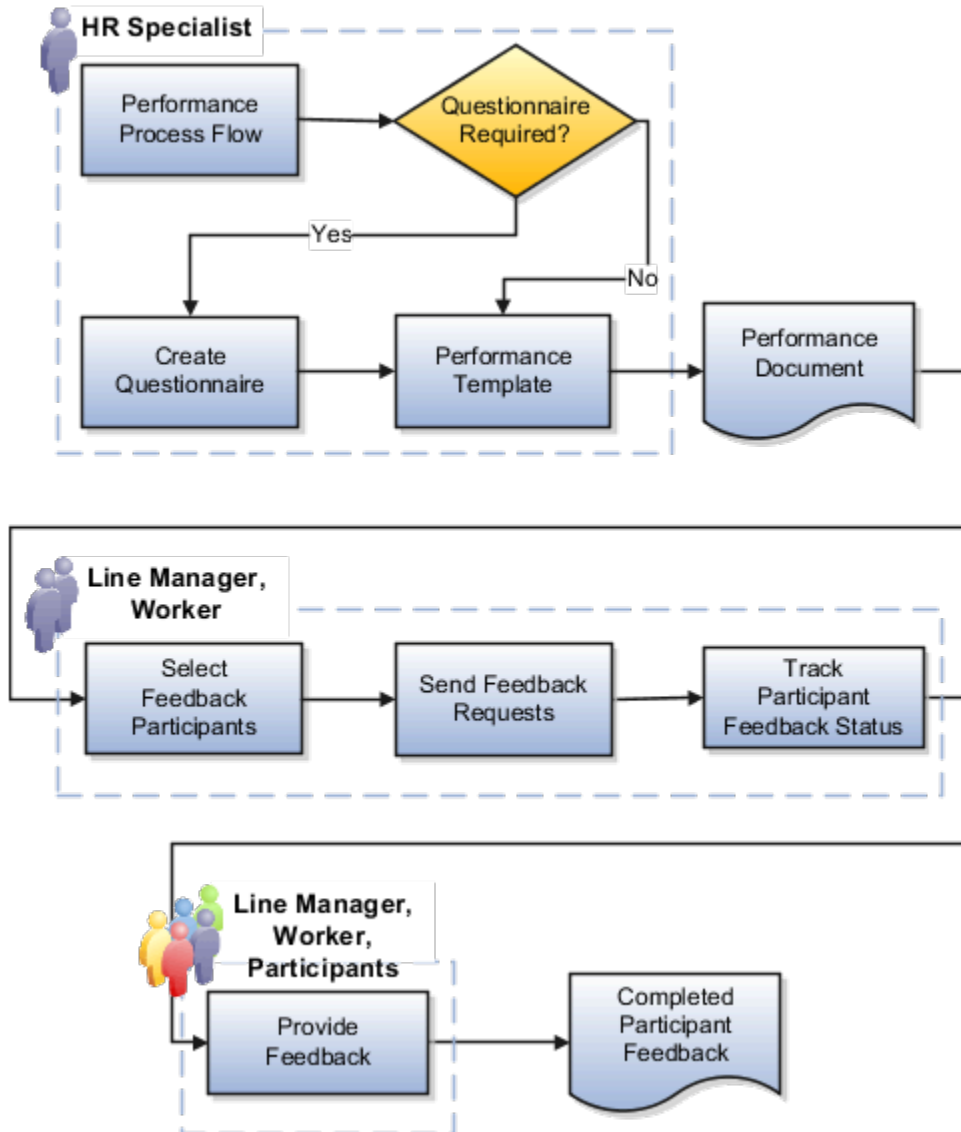
The Manage Participant Feedback task enables individuals other than the line manager and worker to provide direct feedback into the worker's performance document. Additional roles providing feedback might include peers, mentors, customers, and other managers, such as matrix managers.

The additional roles providing feedback are called participants. Participants can evaluate workers on content items by providing ratings, comments, or both, and respond to a questionnaire to provide a 360-degree evaluation. Participant feedback is recorded as part of the official performance evaluation. By including a variety of participants who have worked with the worker, the manager can get a broader view of the worker's performance to help in the evaluation.

The Participant Feedback process provides the ability to:

- Specify who can request and track participant feedback.
- Provide multiparticipant feedback according to role.
- Use questionnaires to provide feedback.
- View participant names, roles, and feedback.
- Submit feedback and complete the Participant Feedback process.
- Print feedback.

This figure shows the steps for gathering participant feedback.



Add a Participant to a Performance Document

The HR specialist must have the appropriate security privilege and data role to add participants to a performance document.

In this example, the HR specialist adds a participant to Meg Smith's performance document.

1. Click **Directory**.
2. Find the person whose performance document that you want to add a participant, for example, Meg Smith.
3. Click the person's name.
4. Click **Show More**.
5. Click **Performance**.
6. Select the review period. The performance documents for Meg Smith appear.
7. Find the performance document that you want to add the participant to.
8. Click the participant status link for that performance document. If there are no participants yet, the link may say **No participants**. Alternatively select the row level Actions option (shown as three dots) and select **Manage Participant Feedback**.

9. In the Participants area, click **Add**.
10. Select the person you want to add as a participant to Meg Smith's performance document.
11. Select the **Role** for the participant.
12. Click **Save**.

Specify Who Can Request and Track Participant Feedback

The human resource (HR) specialist configures the process flow to specify whether managers, workers, or both, can select participants to provide feedback, add questions to the questionnaire, and track feedback request and completion status. Managers and workers use their respective versions of the Manage Participant Feedback page to perform the participant feedback tasks.

When the manager or worker requests feedback, participants receive workflow notifications of the request. Participants access the performance document on the **My Feedback Request for Others** page or from links on their worklist.

Managers and workers can track participant feedback to monitor its status to see whether it's started, in progress, or completed. Depending on configuration, workers can also see the feedback itself and the names of the participants who provided the feedback.

Managers and workers can remove a participant from a performance evaluation, or change the role (for example, change a mentor to a peer), provided the participant hasn't yet provided feedback.

Provide Multiparticipant Feedback by Role

HR specialists create the participant roles that can rate worker competencies, goals, overall performance, and answer questionnaires. They can configure a role that allows participants also to view ratings, comments, and questionnaires provided by the worker, other managers, and participants. In the performance template, the HR specialist selects the roles that can provide feedback in the Profile Content (Competencies), Performance Goals, Development Goals, and Overall Summary sections. The HR specialist can associate separate questionnaire templates, with different questions, to each role.

Managers and workers, if permitted, can select participants of varying roles to provide feedback and notify them to provide feedback. The managers and workers can add the same participant more than once to a performance document. They can select the same role or a different one for the participant. The participant responds to the questionnaires associated with the roles, even if the questionnaires are the same.

Participants can't add or edit content, such as competencies or goals in the performance document, unlike managers and workers.

Use Questionnaires to Provide Feedback

Participants, as well as managers and workers, provide feedback by answering questions about the worker on a questionnaire that the HR specialist adds to the performance document in the performance template. The questionnaire is a performance template section, and appears as a tab in the performance document, just as do other sections, such as the Performance Goals, Development Goals, or Overall Summary sections.

The manager and worker, if allowed, can add questions they create to the questionnaire that's provided for the performance document. They can add questions only to the questionnaires that are associated with the participant roles they select. You must also configure the questionnaire to allow them to add additional questions.

The HR specialist creates questionnaires using the **Questionnaire Templates** and **Questionnaires** tasks in the **Setup Maintenance** area under **My Client Groups > Performance**.

View Participant Names, Roles, and Feedback

Line managers, matrix managers, and workers, if allowed, can view the names and roles of the requested participants, along with the ratings, comments, and feedback they provided. You can configure the performance template so that participants can provide overall comments about the worker instead of answering questions on the questionnaire. Participants can't view ratings, comments, or questionnaire responses provided by the worker, manager, or other participants.

Submit Feedback and Completing the Participant Feedback Process

Line managers, matrix managers, and workers if allowed, can view ratings, comments and feedback when the participant submits the performance document and questionnaire. Participants can continue to provide feedback until the manager either locks the feedback process or completes the Manager Evaluation of Workers task and submits the performance document to continue the performance evaluation process.

Print Feedback

Managers and workers can print participant feedback, as they can with other performance document content. They can, however, only print the content that their role is configured to see. For example, if the performance process flow is configured so the worker can't view participant feedback, the worker can't print it.

8 Matrix Management

How You Use Matrix Management with Performance Evaluations

Matrix management functionality in Performance Management allows managers other than the employee's line manager to evaluate the employee, and view submitted ratings and comments.

Matrix Manager's Role

A matrix manager is an additional manager other than the line manager (for example, a project manager, a team manager, or a functional manager).

In a performance evaluation, matrix managers are participants with a specific, configured performance role that gives them the added ability to view ratings and comments submitted by others. To create a performance role, use the **Performance Roles** task in the Setup and Maintenance work area or on the administrator's Performance page.

For more information on configuring the matrix manager role, see [Create a Participant Role for the Matrix Manager](#)

Actions Matrix Managers Can Do

Matrix managers can access the performance documents that they need to evaluate in the Participant Feedback for Others section of their Performance page.

During a performance evaluation, matrix managers can do these actions:

- Evaluate the employee by providing ratings and comments
- Review the submitted ratings, comments, and questionnaire responses provided by the employee, other managers, and other participants

Note that matrix managers can only provide and view ratings and comments in sections to which they're granted access in the performance template. They can't add or remove content items, such as competencies or goals, from a performance document.

Matrix Manager's Notification

When an employee submits a completed self-evaluation, matrix managers receive a notification, if the **Worker completes self-evaluation** notification option is enabled. You use the **Talent Notifications** task in the Setup and Maintenance work area or the administrator's Performance page to set up the Performance Management notifications. You can also set up the notifications by navigating to **My Client Groups > Performance > Setup > Talent Notifications > Performance Management** tab.

Matrix Manager as Review Participants

Line managers and employees can add matrix managers as review participants to any performance document that they have access to.

1. Open the Performance page of the employee.

2. Select the review period of the performance document.
3. From the Actions menu of the performance document, select **Manage Participant Feedback**.
4. Click **Add** in the Participants section of the Manage Participant Feedback page.

You can see the matrix managers of the employee in the Matrix Managers section, if enabled, or when you search for them.

5. Select the matrix managers and click **Send Request**.

Note: Matrix managers can view the ratings and comments provided by the employee, performance document manager, and other participants only if they're assigned a participant role for which the **Allow role to view worker and manager evaluations** check box is selected for their assigned participant role on the Performance Roles page.

Line managers can also remove matrix managers from the Manage Participant Feedback page, even if they were automatically assigned.

Related Topics

- [Configure Matrix Management for Performance Documents](#)
- [Matrix Manager for an Assignment](#)

Configure Matrix Management for Performance Documents

This topic describes how administrators can configure performance roles, process flows, and templates to use matrix management in performance documents.

Matrix managers can then access performance documents that they need to evaluate in the Participant Feedback for Others section of their Performance page.

Matrix managers are additional managers who aren't defined as the employee's line manager.

Before You Begin

Create at least one of these sections using the Performance Template Sections task. They are required when the **Manage Participant Feedback** task is included in the **Performance Process Flow** task, which is described later in this topic:

- Profile Content (Competencies)
- Performance Goals
- Development Goals
- Questionnaire
- Overall Summary

Create a Matrix Manager Participant Role

A matrix manager must have a participant role to be able to evaluate an employee's performance documents.

Here's how you create a participant role:

1. In the Setup and Maintenance work area, select the **Performance Roles** task.
2. In the Search Results section of the Manage Performance Roles page, click **Create**. You see the Create Performance Role page.
3. Select a role type of **Participant** and enter the role name. The role name can be of the additional managers' type who are expected to review employees, or any other name. You can include this role in the performance template.
4. Enter a description. Descriptions appear on the Manage Participant Feedback pages to assist users in determining which role to assign to each participant.
5. Enter the **From Date** and **To Date**. These dates must be the same as or extend beyond the date range of the performance templates in which they're used.
6. Set the **Status** value to **Inactive** until the role is ready.
7. To enable the matrix manager participant role to view evaluations performed by the employee and other managers, select the **Allow role to view worker and manager evaluations** check box.
8. Click **Save and Close**.

Create a Performance Process Flow

You must add the Manage Participant Feedback task to the performance process flow so that matrix managers can do these tasks:

- Add ratings and comments.
- View ratings and comment submitted by the employee and line manager.

Use the **Performance Process Flows** task in the Setup and Maintenance work area.

1. In the Setup and Maintenance work area, search for and then select the **Performance Process Flows** task.
2. In the Search Results section of the Manage Performance Process Flows page, click **Create**. You see the Create Process Flow page.
3. Enter a name and optionally, a description.
4. Enter the **From Date** and **To Date**. These dates must be the same as or extend beyond the date range of the performance templates in which they're used.
5. Set the **Status** value to **Inactive** until the process flow is ready.
6. In the Worker Self-Evaluation and Manager Evaluation section, select these check boxes:
 - **Include worker self-evaluation task**: To let employees evaluate themselves
 - **Include manager evaluation of worker task**: To let line managers evaluate their direct reports
7. In the Participant Feedback section, select these check boxes:
 - **Include manage participant feedback task**: To enable participants to access the performance document
 - **Manager can select participant**: To let managers select review participants
 - **Worker can select participant**: To let employees select review participants
 - **Manager can track participants**: To enable managers to see the status of the feedback request sent to the participant
8. Select other options as required by your business process.
9. In the Approval, Review and Meetings sections, select the options required for your business process.
10. Click the **Task Names** tab.
11. Enter the sequence numbers and names for the tasks.

12. Click **Save and Close**.

Configure the Performance Template's General Tab

You must add all roles, including the matrix manager participant roles you created, to the performance template in the Participation section of the General tab, and to the sections on which you rate employees so they can view and provide ratings and comments. Use the **Performance Templates** task in the Setup and Maintenance work area or the administrator's Performance page.

1. In the Setup and Maintenance work area, select the **Performance Templates** task.
2. In the Search Results section of the Performance Templates page, click **Create**. You see the Create Performance Template page.
3. On the General tab, enter a name and optionally, comments.
4. Enter the **From Date** and **To Date**. The **From Date** must be the same or later than, and the **To Date** the same as or earlier than the From Date and To Date range of the performance document type, process flow, roles, and sections used in the template.
5. Set the **Status** value to **Inactive** until the role is ready.
6. Select a document type.
7. In the Eligibility Profile section, add eligibility profiles to limit the performance documents to eligible employees, if required by your business process.
8. Optionally, in the Participation section, to warn managers and employees when they don't select the minimum numbers of participants, do these actions:
 - Select the **Set the minimum number for each participant role** check box.
 - In the **Total minimum number of participants required in the document** field, enter the minimum participant number for the entire performance document.
9. In the Participation section, click the **Add** icon.
10. In the **Role** column, select the **Manager** role.
11. Repeat steps 9 and 10, for the **Worker** role, the participant roles you created for matrix managers, and any other participants who use performance documents created from the template.
12. For each participant role, enter the minimum number of participants required per role if you specified that participant feedback is required.
13. Click **Save**.
14. Click the **Process** tab.

Configure the Performance Template's Process Tab

On the Process tab, you add the process flow and configure participation options for matrix management.

You configure participation options to do these:

- Prevent employees and managers from assigning participants a matrix manager role incorrectly.
- Control which participants have access to employees and managers ratings and comments and which participants can provide feedback only.
- Auto-populate specific matrix managers of a certain manager type only.
- Prevent matrix managers that aren't required from being included in an employee's performance review.

Here's how you configure the Process tab:

1. In the **Process Flow** field, select a process flow that contains the Manage Participant Feedback task.
2. Configure the Alerts, Calculation Rules, and Processing Options sections as required for your business process.
3. In the Participant Options section, select the options to achieve the wanted results as shown in the table.

Note: The options in the table are available only if you add a matrix manager participant role to the Participation section of the General tab.

Option	Impact
Participant feedback is required	Requires managers to send at least one feedback request to a participant.
Worker can view the participants added by manager or HR	Employees can see participants' names in the performance document, if configured on the Structure tab of the template.
Auto-populate matrix managers of the worker as participants	Matrix managers appear automatically on the participant list in the Manage Participant Feedback task, and line managers don't have to manually select matrix managers as participants.
Default participant role	Assigns the selected role to auto-populated matrix managers.
Manager Type	Available when you select the Auto-populate matrix managers of the worker as participants check box. You can select all or specific matrix managers.
Allow matrix managers to access worker document automatically	Matrix managers can access the document as soon as it's created in the Participant Feedback for Others region of their Performance page. If this option isn't selected, then the line manager must send a notification manually on the Participant Feedback page.
Employee can assign participant roles that can view worker and manager evaluations	Available only if a participant role is added to a performance template that's configured to 'Allow role to view worker and manager evaluations'. If selected, employees can assign any role to a participant in the Manage Participant Feedback page. If not selected, any participant roles configured in this template aren't available for employees to select in the Manage Participant Feedback page.
Manager can assign participant roles that can view worker and manager evaluations	Available only if a participant role is added to a performance template that's configured to 'Allow role to view worker and manager evaluations'. If selected, managers can assign any role to a participant in the Manage Participant Feedback page. If not selected, any participant roles configured in this template aren't available for managers to select in the Manage Participant Feedback page.

4. Click **Save**.
5. Click the **Structure** tab.

Configure the Performance Template's Structure Tab

On the Structure tab, you add and configure the sections required by the process flow. You add and configure roles in the Processing by Role section.

1. In the Sections section, add a profile content section. You may have named it with a different name.
2. Configure the Section Processing, Item Processing, and Section Content sections as required to conform to your business process.
3. In the Processing by Role section, click the **Add** icon.
4. In the **Role** column, select **Manager** to grant access to the section.
5. Complete the fields as wanted for the manager as shown in this table. For all other processing options, leave the default values, or select others as wanted. Repeat steps 3 through 5 for granting access to employees, matrix managers, and other participants. Complete the fields, as shown in this table.

Role	Share Ratings	Share Comments	Participant Name Can Be Viewed by the Role	Participant Role Can Be Viewed by the Role
Manager	Yes , to share ratings with employee	Yes , to share comments with employee	- o Yes: To let manager view participant name - o No: To display participants only as Participant	- o Yes: To let manager view participant role - o No: To display participant roles as Participant
Worker	By default, this is Yes . You can't change this value.	By default, this is Yes . You can't change this value.	- o Yes: To let employee view participant name - o No: To display participants only as Participant	- o Yes: To let employee view participant name - o No: To display participants only as Participant
Matrix Manager	Yes , to share ratings with employee	Yes , to share comments with employee	Inherits Manager setting	Inherits Manager setting
Participants	Yes , to share ratings with employee	Yes , to share comments with employee	Not available	Not available

6. Click **Save**.
7. Click the **Content** tab.

Configure the Performance Template Content, Document Periods, and Summary Tabs

Complete the performance template by configuring the Content, Document Periods, and Summary tabs. On the Document Periods tab, you can add questionnaires and assign roles to access them.

1. Add content to the Profile Content, Performance Goals, and Development Goals sections as required for your business process.

Tip: Click **Load Items from Section** to add the default content items of the section to the template.
2. Click the **Document Periods** tab.

3. Add periods as required for your business process.

Note: The document period end date must be earlier than or equal to the end date of the performance template.

4. In the Eligibility Profile for the Period section, add eligibility profiles if required by your business process.
5. In the Due Dates section, enter task due dates.
6. In the Questionnaires for the Period section, click the **Add** icon. Questionnaires are optional to provide participant feedback.
7. In the **Role** field, select a role that can access the questionnaire.
8. In the **Questionnaire** field, select an existing questionnaire.

Note: The employee's line manager can select a different questionnaire for the role in the **Manage Participant Feedback** task.

9. Repeat steps 6 through 8 to add additional roles and questionnaires.
10. Click the **Summary** tab.
11. Review your selections and click **Save and Close**.

Related Topics

- [How You Use Matrix Management with Performance Evaluations](#)

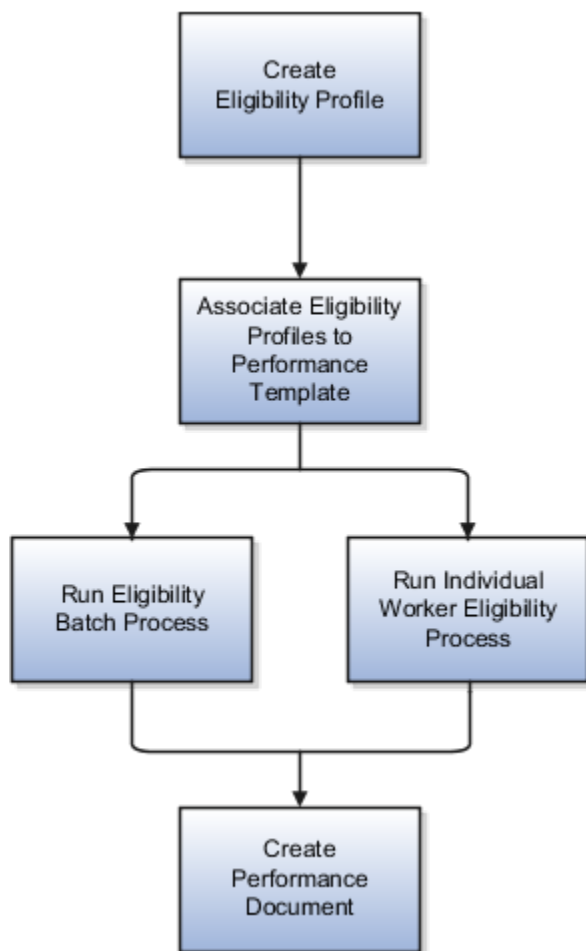
9 Eligibility Profiles

How You Use Eligibility Profiles with Performance Documents

You can use eligibility profiles to restrict availability of performance documents to a specific population based on criteria you set up.

If you don't associate eligibility profiles with a performance document, the document can be created for everyone in the organization.

This figure shows the steps required to set up and use eligibility profiles for performance documents.



Creating Eligibility Profiles

You create eligibility profiles to match the business requirements for your performance evaluation business process. For example, you can create eligibility profiles to evaluate workers in a specific department, job, location, or other criteria. You can also combine criteria. For example, you can create a performance document to evaluate every person in the

Sales department who's a manager level 3 and located in California. You can either create one eligibility profile with those three criteria, or create three separate profiles with each criterion. You create eligibility profiles using the Eligibility Profiles task in the Setup Maintenance work area.

When creating an eligibility profile for performance documents, you can select any profile usage. However, because eligibility for a performance document is determined by assignment, you must select **Specific assignment** as the assignment to use. **Specific assignment** is automatically selected if you first select **Performance** as the profile usage. Then, when the eligibility process is run, it evaluates every assignment for a worker to determine which, if any, performance documents the worker is eligible to use for each assignment.

Associating Eligibility Profiles with Performance Templates

You select eligibility profiles to associate with performance templates at the template level and for performance document periods. When you select eligibility profiles, the performance documents made from the template are available only to the workers who meet the criteria.

You can associate eligibility profiles for any profile usage to a performance template. However, only those with the assignment set to **Specific assignment** are available to associate with performance templates.

Eligibility profiles can either be required, or not required, and can be used in combination so that workers must match some or all criteria.

Running the Eligibility Process

To determine which workers are eligible for performance documents that use eligibility profiles, you must run the eligibility process. You can run a batch process to analyze a large worker population to determine who's eligible for performance documents based on the parameters you enter. To run the batch process, use the Eligibility Batch Process task in the Setup Maintenance work area.

Accessing the Performance Documents

HR Specialists are responsible for creating standard performance documents for employees.

When performance documents are created, they show to employees on **Me > Career and Performance > Performance**. Managers can view and process the performance documents they manage on **My Team > Evaluate Performance**. The Goals and Performance Overview page also shows a summary of the performance documents for their direct or indirect reports, including performance documents managed by someone else such as a matrix manager.

Employees, managers and HR Specialists can create anytime documents from the employees Performance page. Managers can also create them from the **Goals and Performance Overview** page. HR Specialists can also create them from the administration page Performance Documents.

If a performance document is created for an employee and the eligibility process is run again, but now the worker is ineligible, it doesn't delete the created performance document and it can continue to be accessed.

However, if a performance document wasn't created and the eligibility process is run again, making the worker no longer eligible for the document, that document can't be created for the employee whether a standard or anytime document.

Related Topics

- [Eligibility Profiles](#)

Examples of Using Eligibility Profiles with Performance Documents

With eligibility profiles, you can use performance documents to evaluate a specific population of workers. These scenarios illustrate how human resource (HR) administrators can create eligibility profiles and run the eligibility process to make the documents available to workers and managers.

Create Eligibility Profiles and Run a Batch Process for an Organization

The organization wants to create a performance document to compare how the sales force performs across all departments in the US. The HR administrator creates an eligibility profile, called US Sales Team, and selects **Performance** for the profile usage. The assignment to use value automatically becomes **Specific assignment**. The HR administrator selects these criteria for all active workers:

- Active, not on leave
- Located in the US
- Employed in the Sales job family

The HR administrator or implementor completes these steps:

1. Create a performance template, with a performance document period for the current evaluation period named US Sales Annual Evaluation.
2. Add the US Sales Team eligibility profile to the document period.
3. Run the eligibility batch process to find all eligible salespeople to make the US Sales Annual Evaluation performance document available to them and their managers to start the evaluations.

You run the eligibility batch process using the Eligibility Batch Process task in the Setup Maintenance area.

Remember that the Performance Eligibility responsive page doesn't run the eligibility batch process and you can only change eligibility that's been processed. So make sure you run the process for a performance document before you try and make any changes to an employee's eligibility using the Performance Eligibility page.

Check Eligibility when a Worker Transfers to an Organization

You hire a new worker, Lee Smith, in the Sales department under a manager, John Hing, after the batch process is run and performance documents are created for the Sales team. Lee isn't initially eligible for the US Sales Annual Evaluation period document, but should be, since he joined Sales midway through the evaluation period.

As an HR administrator, complete these steps to create his performance document:

1. Go to **My Client Groups > Performance**, scroll down to the Setup Maintenance section, and click **Eligibility Batch Process**.
2. Run the process for the US Sales Annual Evaluation performance document.

If the performance document isn't created for Lee Smith, then follow these steps to see why he's not eligible:

1. Go to **My Client Groups > Performance**, and click **Performance Eligibility** in the Administration section.
2. Search for **Lee Smith** and select his name.
3. Click **Check Eligibility** located in the page header.

4. Change the effective date and review period, as required.
5. Select the US Sales Annual Evaluation performance document. Lee Smith's eligibility status appears in the Result area. If he's eligible, then he and his manager John can access the performance document when it's created and begin the evaluation.

Force Eligibility when a Worker Transfers from another Organization

Taylor Wong transfers from the US Sales department to the Hong Kong Sales department midway through the period covered by the US Sales Annual Evaluation performance document. The HR administrator has run the batch eligibility process for the last time after Taylor transferred, making Taylor ineligible to use the US Sales Annual Evaluation performance document. However, the organization process requires that Taylor be evaluated using performance documents for both his old and new locations.

The HR administrator completes these steps:

1. Navigate to the Performance Document Eligibility page, search and select Taylor Wong.
2. On the Performance Document Eligibility page, click Add, select the US Sales Annual Evaluation performance documents, and specify to force it eligible.

Even though Taylor no longer meets the eligibility criteria, he and his new manager can access the performance document to perform the evaluation.

Related Topics

- [Eligibility Profiles](#)

10 Eligibility Batch Process

How You Manage Eligibility for Performance Documents and Check-In Templates

You can view and manage an employee's eligibility for performance documents or check-in templates on the Performance Eligibility page.

This page displays performance documents and check-in templates that an employee is automatically eligible for, forced to be eligible for, or forced to be ineligible for based on eligibility profiles. It doesn't display performance documents or check-in templates that an employee is automatically ineligible for.

If a performance document or check-in template hasn't been processed for eligibility yet, you can check if the employee is eligible for it. If they're ineligible, you can see which criteria caused the ineligibility. You can also process the eligibility for that performance document or check-in template without running the eligibility batch process.

Note: The review period on the Performance Eligibility page is used to filter the display of information. It isn't used to determine eligibility. If a check-in template is associated with multiple review periods, the check-in template displays when any of those review periods are selected. If the employee is made eligible or ineligible for the check-in template, that eligibility is enforced when any of the review periods are selected.

If you want to exclude certain employees' eligibility for performance documents, you can use HCM Data Loader. Using the Performance Document Eligibility business object, you can process eligibility for specific employee assignments, instead of all assignments. This way excluded assignments won't be processed, and you can change eligible assignments to ineligible or vice versa.

View Performance Document and Check-In Template Eligibility

This topic includes the procedure to view an employee's eligibility for performance documents and check-in templates.

To view an employee's eligibility for performance documents or check-in templates, follow these steps:

1. Go to **My Client Groups > Quick Actions > Show More > Talent > Performance Eligibility**.
2. Search for the employee whose eligibility you want to view.
3. Click the employee's name in the search results.

Note: The Performance Eligibility page displays all the performance documents and check-in templates that match the person's eligibility.

4. (Optional) Click **Check Eligibility** to check for all performance documents and check-in templates listed.
5. (Optional) Click **Add** in the Performance Eligibility section to force employee eligibility for a performance document they are ineligible for based on the eligibility batch process.

6. (Optional) Click **Add** in the Check-In Template Eligibility to force employee eligibility for a check-in document they are ineligible for based on the eligibility batch process.
7. (Optional) Click **Edit** to manually change the employee's eligibility status. Options include:
 - Keep Eligible—Force employee to remain eligible for performance documents they may become ineligible for. This option is available only if the status is Eligible.
 - Force Eligible—Force employee eligibility for performance documents they are forced ineligible for. This option is available only if the status is Force Ineligible.
 - Force Ineligible—Force employee ineligibility for performance documents they may become eligible for. This option is available only if the status is Eligible or Forced.

Eligibility Batch Process for Performance Documents and Check-In Templates

You can run the Eligibility Batch Process to determine which standard and anytime performance documents a population of workers is eligible to use for their performance evaluation.

You can also run the eligibility batch process to determine which population of employees are eligible to use check-in templates for creating check-in documents.

Use the batch process to process eligibility for a specific performance document for all workers in an organization. Once you run this process to determine employee eligibility, this is what happens:

- Eligible employees can have standard performance documents created for them by HR specialists. You can create standard performance documents at the time of running the eligibility process or later.
- Anytime performance documents are available and can be created for eligible employees.
- Check-in documents are available and can be created for eligible employees.

Only employees who have access to the Scheduled Processes work area can run batch processes.

How the Batch Process Works

The batch process evaluates the worker population for a specific performance document or check-in template and selects those workers who are eligible based on the eligibility profile criteria.

The eligibility batch process determines eligibility for active as well as suspended assignments of the entire worker population. Workers with more than one assignment can be eligible for a different performance document or check-in template for each assignment.

The eligibility profiles used to determine eligibility for a performance document are those associated with the performance document period in the performance template.

When the eligibility process is complete, standard performance documents, if configured, will be created for eligible employees or can be created by HR specialists. Anytime performance documents and check-in templates are available to workers, managers, and HR specialists to create documents for eligible employees.

Eligibility Batch Process Parameters for Performance Documents and Check-In Templates

This table lists the parameters available to select for the eligibility batch process for performance documents and check-in templates.

Parameter	Description
Effective as of Date	This is a mandatory parameter. It determines when a worker population is eligible for performance documents and check-in templates. If you set a future date, documents can only be created for eligible employees from that date. For scheduled processes, select Current Date to use the system date every time the process runs.
Review Period	This is a mandatory parameter. Using this, you can find a performance document or check-in template that matches the selected review period. By default, this displays the latest review period, but you can change it to find the performance document or check-in template that you want to process. Note: If a check-in template is associated with multiple review periods, the eligibility for the check-in template is the same regardless of which review period is selected.
Performance Document Name	This is a mandatory parameter when the batch process type is to assign performance documents. Select the name of the performance document that you want to process.
Check-In Template Name	This is a mandatory parameter when the batch process type is to assign check-in templates. 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. This field only applies when running the eligibility process for performance documents: The Maximum Number of Concurrent Threads for Performance Document Creation option lets you process multiple performance documents at the same time depending on the number of threads allowed. The more threads allowed, the quicker the process will run but this in turn could affect system resources being used for other processes. By default, 8 is recommended. When configuring this option, you should consider the impact on resources.
Purge Historic Performance Management Eligibility Status Data	Choose whether to permanently delete the results of historic performance eligibility batch processes to improve system performance.
Purge Data Older Than	Purge any results data older than the specified date.

When to Run the Batch Process

You can run the eligibility batch process on demand or schedule it to run at a later time or on a recurring interval.

Here are times when you run the batch process:

- A new review or evaluation period begins.
- You hire new employees.
- You add or remove eligibility profiles from a performance or check-in template.
- An eligibility profile associated with a performance or check-in template is changed.
- Worker status changes are made for criteria that are part of the eligibility profile, such as job, or location.

Run the Eligibility Batch Process

When you run the batch process, you find performance documents or check-in templates based on the associated review period that you can assign to eligible workers.

1. Go to **My Client Groups > Performance**.
2. Select the **Eligibility Batch Process** task in the Setup Maintenance area.
3. Select the type from the Batch Process Type list.
 - Assign Performance Document
 - Assign Check-In Template
4. (Optional) Choose to be notified when the process ends. Enable notifications beforehand to receive this notification.
5. (Optional) In **Submission Notes**, enter any information that helps identify this batch process.
6. Enter values for the parameters. For details, see *Eligibility Batch Process Parameters for Performance Documents and Check-In Templates*.
7. Click **Advanced** to set up scheduling and notification preferences:
 - Click the Schedule tab to either run this process as soon as possible or schedule it later. To schedule this process, you can set up the frequency and choose a start date.
 - Click the **Create Notification** icon in the Notification tab to notify recipients when the batch process completes successfully, displays a warning, or errors out.
8. Click **Process Options** to specify your language, territory, time zone, and other preferences.
9. Click **Submit**.
10. (Optional) Click the **Monitor Process** button to monitor the status of the eligibility process.

How can I improve the performance of the Performance Management application?

You can potentially improve the performance of your application and free up storage by permanently deleting unnecessary data.

When you run the Manage Eligibility Batch process, there's an option for you to purge historic performance management eligibility status data. You can even specify to purge data older than a specific date. Just remember that you can't recover the data after you purge it.

11 Performance Process Flows

Options for Performance Process Flow Setup

Set up the process flow to include the tasks, and their sequence, used by the performance template for performance evaluations.

You can create as many templates as you need, and each template supports an evaluation type, such as annual, semiannual, and project evaluations. Your decisions determine the:

- Tasks and subtasks to include
- Task sequence
- Task names

You manage process flows using the Performance Process Flows task in the:

- Setup and Maintenance work area, Workforce Development offering, Worker Performance functional area.
- Setup Maintenance area

Tasks and Subtasks

A process flow can contain up to 9 tasks. Some of the tasks contain subtasks. The following table shows the tasks, along with whether the task includes a subtask, which roles can perform the tasks, and a description of the task function.

Task	Subtask	Role that Performs Task	Task Function
Set Goals	N/A	Worker, manager, or both	Add content to rate, such as competencies, performance goals, and development goals to the performance document. Include this task to let workers and managers determine the content the worker is evaluated on, and expectations for the worker, for example, at the beginning of an evaluation period. If this task isn't included, managers and workers can still add content in the Worker Self-Evaluation and Manager Evaluation of Worker tasks. You can select whether to allow workers, managers, or both, to complete the task. When they complete the task, they can use the Share action to allow the other role to review the new content.
Worker Self-Evaluation	Subtask 1: Track Worker Self-Evaluation Subtask 2: Worker Self-Evaluation	Subtask 1: Manager Subtask 2: Worker	Worker evaluates self. Worker can also add content to be rated to the performance document. The manager:

Task	Subtask	Role that Performs Task	Task Function
			- Can track the worker self-evaluation to view any changes the worker makes to the performance document - Can't view the ratings and comments the worker provides until the worker completes the subtask
Manager Evaluation of Worker	N/A	Manager	Manager evaluates worker. Manager can also add content to be rated to the performance document. Select Do not allow additional edit of manager evaluation task when completed to prevent managers from updating ratings and comments once they submit the task.
Participant Feedback	N/A	Manager, worker, or both	Select participants to provide 360-degree feedback in a performance evaluation by providing ratings, comments, or both and completing questionnaires. Send requests to the participants, add questions to questionnaires, and track participant feedback to monitor the status of the request and feedback.
First Approval	N/A	Manager	First task for the approver to approve the performance document of the worker at one stage of the evaluation. Select Automatically submit approvals when preceding task is completed to submit the performance document for approval automatically when the previous task is completed. The automatic submission for approvals also applies when using the Update Performance Tasks task to move tasks forward or back to a task that precedes an approval task. The setting applies to both the First Approval and Second Approval tasks
Second Approval	N/A	Manager	Second task for the approver to approve the performance document of the worker at a later stage of the evaluation.
Share Performance Document	Subtask 1: Share Performance Document	Subtask 1: Manager	The manager shares the document so the employee can view the

Task	Subtask	Role that Performs Task	Task Function
	Subtask 2: Acknowledge Document	Subtask 2: Employee	manager's ratings and comments and acknowledge it. Managers can do any of these actions: • Share the document with the employee while continuing to edit it. • Release the document to the employee and no longer edit it. HR specialists can choose not to allow managers to share the document with employees during the calibration period. When they lock the document for sharing, managers see a banner explaining that they can't share it when it's locked. The settings in the performance template determine which of the manager's ratings and comments an employee can see on the shared performance document.
Confirm Review Meeting Held	Subtask 1: Conduct Meeting Subtask 2: Acknowledge Review Meeting	Subtask 1: Manager Subtask 2: Worker	After the worker and manager meet to discuss the evaluation, the manager indicates that the meeting was conducted, then the worker acknowledges that the meeting took place.
Provide Final Feedback	Subtask 1: Worker Provides Final Feedback Subtask 2: Manager Provides Final Feedback	Subtask 1: Worker Subtask 2: Manager	The worker, but not the manager, can provide final comments about the evaluation in the Worker Provides Final Feedback subtask. The manager, but not the worker, can provide final comments in the Manager Provides Final Feedback subtask. The Include digital signature processing option is available to compel workers to verify that they're the people submitting the performance document. The option is available only in the Worker Provides Final Feedback subtask, so the task must be included in the process flow to activate it. If the option is selected, the signature is required from the worker.

Task Sequence

After you select the tasks to include as part of the process flow, you can change the task sequence. Some tasks are logical in sequence. For example, it's likely that you would place the Set Goals task before the Worker Self-Evaluation and Manager Evaluation of Worker tasks, and those before the First Approval task. However, you may decide not to use all of those tasks. Your enterprise may not require the Set Goals task, and lets workers and managers add performance goals, development goals, and competencies to the performance document as part of the evaluation tasks.

Other tasks have more flexibility. For example, you may want to schedule the Share Document task either before, or after, the First Approval task, depending on when you prefer to let workers see the manager ratings.

During the performance evaluation, all tasks must be completed by the role that performs the task before the next task can be started, even if the same role performs both tasks.

This rule doesn't apply to these tasks:

- Set Goals
- Participant Feedback
- Worker Self-Evaluation
- Evaluate Worker

You can perform the Set Goals task at the same time as the Participant Feedback task, but make sure you complete it before other tasks.

You can configure the process flow to allow workers to perform the Worker Self-Evaluation and managers the Evaluate Worker tasks concurrently. When you do so, managers and workers can perform their respective worker evaluation tasks simultaneously or at different times. To use concurrent Worker Self-Evaluation and Evaluate Worker tasks, select **Evaluation tasks can be performed concurrently** and consider the following:

- With the exception of two tasks, you must also specify the two tasks to be consecutive in the process flow so there are no tasks between them.
- The Participant Feedback task can appear between the Worker Self-Evaluation and Evaluate Worker tasks.
- When you configure the sequence, remember to specify that one task or the other is completed first.
- Start the process flow with either the concurrent evaluations task or the Participant Feedback task, even if it's not designated as the first in the sequence.
- Managers and workers can provide ratings and comments, and add additional content to the performance document concurrently until they complete and submit the document.
- The task that's designated as the first must be completed first.
- When the role that performs the first worker evaluation task (typically the worker) submits the document after completing the task, the other role can see the ratings and comments provided by the other.
- Workers can perform the Participant Feedback and Worker Self-Evaluation tasks concurrently, but only after the Set Goals task is complete, if it's part of the process flow.
- Managers can perform the Participant feedback at the same time as the worker does the self-evaluation, or when performing the Evaluate Worker task.

Task Names

You can configure the task and subtask names for both the manager and worker roles. The names you configure appear on the application pages. You must configure task names separately for each process flow you set up.

Related Topics

- [Actions for Performance Document Approvals](#)

Examples of Performance Process Flows

You create process flows that are referenced by performance templates to create specific evaluations.

These examples show how to use process flows for some common review situations.

Creating a Process Flow for an Annual Review

Big Computers Company has an annual evaluation for all employees. Company policy requires these items for performance evaluation:

- Employees and managers collaborate on adding content to the performance document.
- Both workers and managers are required to rate the worker.
- Managers are required to request and receive participant feedback from at least two sources to evaluate the worker as part of the 360-degree evaluation.

When the manager and worker complete the evaluation, company policy requires this sequence of events:

1. The manager must seek approval for the completed performance document.
2. After the document is approved, managers must conduct a formal meeting with the worker to discuss the evaluation, which the worker must acknowledge.
3. After the meeting, the worker can comment on the performance evaluation or the process, which the manager can then reply to.

Big Computers Company plans to change the default names of the tasks and subtasks to reflect the company's terms.

The tasks and subtasks in this table show the process flow Big Computers Company uses to create the performance documents for their annual review.

Task Order	Default Task Name	New Task Name	Default Subtask Name	New Subtask Name	Roles
10	Set Goals	Set Competencies and Goals	N/A	N/A	Worker Manager
20	Worker Self-Evaluation	N/A	Subtask 1: Track Worker Self-Evaluation Subtask 2: Worker Self-Evaluation	Subtask 1: Track Employee Evaluation Subtask 2: Evaluate Yourself	Subtask 1: Manager Subtask 2: Worker
30	Manager Evaluates Worker	Evaluate Employee	N/A	N/A	Manager

Task Order	Default Task Name	New Task Name	Default Subtask Name	New Subtask Name	Roles
40	Manage Participant Feedback	Request Feedback	N/A	N/A	Manager
50	First Approval	Approve Evaluation	N/A	N/A	Manager
60	Confirm Review Meeting Held	N/A	Subtask 1: Conduct Meeting Subtask 2: Worker Acknowledges Review Meeting	Subtask 1: Confirm Meeting Subtask 2: Acknowledge Meeting	Subtask 1: Manager Subtask 2: Worker
70	Provide Final Feedback	N/A	Subtask 1: Worker Provides Final Feedback Subtask 2: Manager Provides Final Feedback	Subtask 1: Provide Feedback to Manager Subtask 2: Provide Final Feedback	Subtask 1: Worker Subtask 2: Manager

Create a Process Flow for a Project Review

The company has a special project for a group of workers to deliver a new module within six months for their existing mobile application to beat a competitor. Big Computers Company wants to perform a simplified review of the workers who worked on this important project. The workers are also subject to the annual performance evaluation in a few months.

For the project review, these guidelines apply:

- Managers provide all the goals and the reviews as part of the Manager Evaluates Worker task.
- Workers aren't required to provide any goals or perform a self-evaluation on the project. The company wants workers to focus on their work responsibilities, not the evaluation process.
- Manager evaluations must be approved.
- Managers must share the documents with the workers because the workers are required to acknowledge that they reviewed the manager ratings.
- No meetings are required, since those can be combined with the meetings following the annual review.
- Big Computers Company keeps the default names of the tasks and subtasks.

The following table shows the tasks, along with who performs them, and the order that's required to create the process flow.

Task Order	Task	Subtask	Roles
10	Manager Evaluates Worker	N/A	Manager
20	First Approval	N/A	Manager

Task Order	Task	Subtask	Roles
30	Share Performance Document	Subtask 1: Share Performance Document Subtask 2: Worker Acknowledges Document	Subtask 1: Manager Subtask 2: Worker

Concurrent Worker Evaluation Tasks

The manager and worker can evaluate the worker concurrently during the performance evaluation when the performance document is configured to allow it.

With concurrent evaluations, managers and workers can perform their respective worker evaluation tasks at the same time or at different times. In either case, the managers and workers can provide ratings and comments and add additional content to the performance document until they complete and submit the document. This allows managers to start working on the evaluation before the workers complete it.

Configure Evaluation Tasks for Concurrent Evaluations

The performance document needs to be configured to allow concurrent evaluations. Even though evaluations can be performed concurrently, the document is structured so the worker must complete the self-evaluation task first, or the manager must complete the evaluate worker task first. Typically, performance documents require the worker to complete the self-evaluation task first.

The HR specialist configures the process flow to allow concurrent evaluations and the task order on Performance Process Flows. You can add a new performance process flow or search for an existing flow and edit it.

Add, Remove, and Update Content

Both the manager and worker can add performance goals, development goals, and competencies to the performance document even while the other person is actively reviewing the worker. They can update goal details only when the other role isn't currently performing the evaluation task.

These rules apply to removing content:

- The manager can remove content items during the evaluation, even if the worker has provided ratings or comments for them.
- Workers are restricted to removing content items that they added and for which their managers haven't provided ratings or comments.
- Neither the worker nor the manager can remove content items when they're performing their respective evaluation tasks at the same time or after the manager submits the document.

View Added Competencies and Goals

Here's what happens after the worker or manager adds goals or competencies:

- They're available to the other role in the performance document immediately.

- The content is visible when the performance document is opened.
- If both the worker and manager are performing the evaluation tasks at the same time, they can see the added content when the section it was added to is refreshed.

For example, if a manager adds a goal to a performance document, the workers sees it when they select the tab for the section containing goals. If the worker is already on the goals section, the worker must select another tab in the document and return to the goals section to see the goal.

View Ratings and Comments

Ratings and comments aren't visible to the person who performs the final evaluation task until the other role submits the performance document. For example, if the employee is required to complete a self-evaluation first, the manager can only view the ratings and comments provided by the employee after the employee submits it. The manager ratings and comments are visible to the employee after the manager submits the manager evaluation, or when there is an approval after the manager evaluation and the approval is completed, or when the manager shares the document (if the **Share Performance Document** task is enabled).

Note: The manager can't share the performance document with the employee if it's locked for sharing during the calibration period. This setting is enabled as part of the Document Periods section in the performance template.

Participant Feedback Task Options

HR specialists can include the Manage Participant Feedback task as part of the process flow to let participants evaluate workers by providing ratings and comments.

Managers, workers, and participants can also provide feedback on a questionnaire as part of a multiparticipant evaluation. You can set up the Manage Participant Feedback task so that managers, workers, or both, can:

- Select participants
- Request feedback
- Add questions to the questionnaire
- Track participants

Include the Manage Participant Feedback Task

When you include this task, you enable others, such as peers, colleagues, matrix managers and other managers to evaluate workers by providing ratings, comments, or both, on competencies, goals, and overall performance. You also allow the manager, worker, and invited participants to answer a questionnaire in the performance document to gather feedback to help the manager evaluate a worker. You create questionnaires using the template in the Questionnaires feature of the Oracle Fusion Profile Management business process and add the questionnaire to the performance template as a section.

To include participant ratings, you add the participant roles to the Profile Content, Performance Goals, Development Goals, and Overall Summary sections in the performance template. To gather feedback on a questionnaire, you add the participant roles to the Questionnaire section.

Select Participants

You can specify whether managers, workers, or both, can select participants to provide ratings, comments, and questionnaire feedback. When using questionnaires, managers or workers select the participant role, which determines which questionnaire is available to the participant. Questionnaires are associated with particular roles in the performance template.

Send Feedback

Managers can always request feedback by sending a request directly to a participant, who's notified by email of the request. You can also specify whether to permit workers to request feedback directly to a participant without manager approval. If you don't select the **Worker can request feedback** option, the worker can still add a participant to the list of potential participants. But when the worker sends the request, the manager receives notification that the worker has added a participant. The manager can then send the request directly to the participant if the manager supports the request.

Add Questions to the Questionnaire

Specify whether to enable managers, workers, or both, to add questions they create to the questionnaire. The questionnaire must also be configured to enable managers and workers to add questions. They can add questions only to the section of the questionnaire that's configured to enable questions to be added.

Track Participants and Feedback

You can specify whether managers, workers, or both, can track the status of participant feedback to see whether a request was sent, the participants replied to the request, or they completed the feedback. The **Worker can view feedback before evaluations are complete** option determines when workers can view feedback in the performance document. If you don't select the option, a worker can see the participant feedback only after the **Manager Evaluation** task is shared with the worker. If the worker shouldn't see the participant's name for any section of the performance document, the only way they can see all the feedback from that participant is in their own view of the performance document, where the feedback displays anonymously. Also, if **View Participant Names** is set to **No** for the employee or manager role for any section in the performance template, then **View Feedback** doesn't display for the employee or manager role in the Manage Participant Feedback page. This is regardless of whether the **Worker can view feedback before evaluations are complete** option is selected.

Reopen Participant Feedback

HR administrators can help participants who want to provide some more information in a worker's performance document by allowing them to reopen feedback that's already been submitted.

You can configure options for workers, managers, and participants to reopen submitted feedback in the Participant Feedback section in the Process Flow page. A few things to note:

- You can only reopen the submitted feedback if the Manage Participant Feedback task isn't complete.
- You won't be able to use the **Worker can reopen submitted feedback** option if the process flow is in use.
- If you decide to use these options, then it doesn't affect when the Manage Participant Feedback task is complete, but it means that feedback can't be provided and actions can't be performed.

Options for Configuring Performance Documents to Display Performance Ratings to Employees

You can configure a performance document to make performance ratings and comments available to employees at different points of a performance evaluation, or not at all.

The availability of performance ratings and comments to employees depend on configurations you make to these Performance Management components:

- Process flow
- Sections in the performance template

Configure the Process Flow

When employees can see performance ratings and comments depends on the inclusion and order in the process flow you configure for these tasks:

- Manager Evaluation of Workers
- Share Performance Document
- First Approval

You must include the **Manager Evaluation of Workers** task to the sections in which managers can rate and provide comments on employee performance. Performance ratings and comments are available in four sections in the performance document: Overall Summary (overall rating) Profile Content (competencies), Performance Goals, and Development Goals. You configure process flows using the **Performance Process Flows** task in the Setup and Maintenance work area or on the administrator's Performance page.

The table shows when the ratings and comments are available to employees depending on the tasks you added to the process flow, and the order of the tasks.

Task Scenario	Impact
Share Performance Document task is included in process flow	Employees can view performance ratings and comments when the manager clicks either of these buttons: • Share and Edit • Share and Release
First Approval and Manager Evaluation of Workers tasks are included in process flow; Share Performance Document task isn't included	• If you place the First Approval task after the Manager Evaluation of Workers task, employees can view performance ratings and comments when the approval task is completed. • If you place the First Approval task before the Manager Evaluation of Workers task, employees can view performance ratings and comments when the Manager Evaluation of Workers task is completed.
Manager Evaluation of Workers task is included in process flow; Share Performance Document and First Approval tasks aren't included	Employees can view performance ratings and comments when the Manager Evaluation of Workers task is completed.

Configure Sections in the Performance Template

Add and configure the Overall Summary, Profile Content, Performance Goals, and Development Goals sections in the performance template. This lets managers share the ratings and comments and allows employees to access the sections. Note these points when you configure the sections:

- You can add any, or all of the sections when the **Manager Evaluation of Workers** task is included in the process flow.
- You configure the sections on the Structure step of the performance template.
- You create and edit performance templates using the **Performance Templates** task in Setup and Maintenance.

In the Structure step, for the section you're configuring, do these actions:

1. In the **Processing by Role** section, add a row and select **Manager**.
 2. In the **Manager** row, select **Yes** in these columns:
 - **Share Ratings**: To share ratings with the employee
 - **Share Comments**: To share comments with the employee
- Note:** The default setting for both columns is **No**.
3. To make the section visible to the employee, add another row and select **Worker**. The **Share Ratings** and **Share Comments** settings for the **Worker** row are set to **Yes** and you can't change their value because managers can always view the employee ratings and comments.

How Performance Document Completion Status Is Determined

You define the tasks and subtasks that are included in a performance document in the process flow.

Settings That Affect Performance Document Completion Status

Each task and subtask has a status. When a task has subtasks, its status derives from the status of its subtasks. The status of a performance document derives from the status of all tasks in the document's process flow.

The following table shows the task statuses.

Task	Roles	Valid Statuses	Has Subtasks?
Set Goals	Worker	Not started	No
	Manager	In progress	
		Completed	
Worker Self-Evaluation	Worker	Not started	No
		In progress	

Task	Roles	Valid Statuses	Has Subtasks?
		Completed	
Manager Evaluation of Worker	Manager	Not started In progress Completed	No
Manage Participant Feedback	Worker Manager	Not started In progress Completed	Yes
First Approval	Manager as Requester	Not started Approved	No
Second Approval	Manager as Requester	Not started Approved	No
Share Performance Document	Worker Manager	Not started In progress Completed	Yes
Conduct Meeting	Worker Manager	Not started In progress (visible only to the manager after sharing the document with the worker, before the worker acknowledges the meeting) Completed	Yes
Final Feedback	Worker Manager	Not started In progress Completed	Yes
Set Next Period Goals	Worker Manager	Not started In progress Completed	No

Note: The Manage Participant Feedback Task can be performed concurrently with the Worker Self-Evaluation and Manager Evaluation of Worker tasks. It's completed when the manager submits the performance document or locks the feedback to prevent any participants from providing additional feedback. The app permits the Manage Participation Feedback task to be completed whether or not any participants submitted feedback.

In addition, two statuses appear for tasks in the performance evaluation business process that don't factor in the completion status calculation:

- Ready indicates that the task is ready to be started and the status of the previous task in the process flow is Completed. Not Started, by contrast, indicates the task hasn't been started and isn't ready to be started as the status of the previous status isn't Completed.
- Missing indicates that a performance document hasn't been created. This status doesn't really exist in the same way as other performance document statuses; it appears in the analytic Task Completion Status.

For subtasks, the status changes from Not started to In progress when the person performing the subtask saves a performance document. When that person submits the performance document, or uses an equivalent action, such as sharing or acknowledging the performance document, the subtask status changes to Completed. The following table shows a summary of the possible subtask statuses.

Task	Subtask	Roles	Valid Statuses
Share Performance Document	Share Performance Document	Manager	Not started In progress Completed
Share Performance Document	Share Performance Document	Worker	Not started Completed
Conduct Meeting	Confirm Review Meeting Held	Manager	Not started Completed
Conduct Meeting	Confirm Review Meeting Held	Worker	Not started Completed
Final Feedback	Provide Final Feedback	Worker	Not started In progress Completed
Final Feedback	Provide Final Feedback	Manager	Not started In progress Completed

How Completion Status is Calculated

The performance document status is derived from the task status, which is derived from the status of any subtasks within the task. For tasks that have subtasks, the status is Completed when all the subtasks within the task are completed.

The performance document statuses and the condition leading to each status for all available tasks are shown in the following table.

Document Status	What the Status Means
Not started	No tasks are started
In progress	At least one of the following tasks are in progress or completed: Worker Self-Evaluation, Manager Evaluation of Worker, Manage Participant Feedback
Submitted	Manager submitted the performance document for approval
Approved	Approver approved the performance document
Document shared with worker	Manager completed the Share Performance Document subtask
Document acknowledged	Worker completed the Share Performance Document subtask
Review meeting held	Manager completed the Confirm Review Meeting Held subtask
Review meeting acknowledged	Worker completed the Confirm Review Meeting Held subtask
Worker final feedback provided	Worker submitted final feedback
Manager final feedback provided	Manager submitted final feedback
Completed	All tasks and subtasks are completed
Canceled	Human Resource (HR) specialist or the manager canceled the performance document

Relationship of Subtask Status to Task Status for One Subtask

If the process flow includes a task that has subtasks but only one subtask is configured, then the task status is the same as the subtask status.

Relationship of Subtask Status to Task Status for Two Subtasks

The process flow definition includes the Final Feedback task. Both subtasks are configured: Worker Final Feedback and Manager Final Feedback. The Manager Final Feedback subtask can't begin until the Worker Final Feedback task is completed.

Subtask Status: Worker Final Feedback	Subtask Status: Manager Final Feedback	Task Status: Final Feedback
Not started	Not started	Not started
In progress	Not started	In progress
Completed	Not started	In progress
Completed	In progress	In progress
Completed	Completed	Completed

Performance Document Approvals

Configure Performance Approvals

You can set up approvals for performance documents to include multiple approval tasks, and a hierarchy of approvers.

When the manager or worker submits the document for approval, approvers receive notification that the document is ready for approval, and they can approve or reject the document in multiple locations.

Configuring Approval Tasks in the Process Flow

To use approvals, you must configure the process flow to include an approval task. You set up process flows using the Performance Process Flows task in the Setup Maintenance work area. You can set up process flows to require one, two, or no approval tasks. If you include approval tasks, you can place them in whatever order your business process requires. For example, you might want to create a process flow with the First Approval task after the Manager Performs Worker Evaluation task, and the Second Approval after the Final Feedback task.

When each approval task is reached, the manager must submit the performance document for approval, even if the worker performs the task before the approval task. The document goes through the entire approval process so all required approvers must approve the document before the evaluation continues.

You can configure performance process flows to skip the action of submitting performance documents for approval. By enabling auto-submit for approval tasks, when the preceding task is completed, the approval task submits automatically. You can select auto-submit on the **Performance Process Flows** page, in the Approval, Review and Meetings section. This setting applies to both the First Approval and the Second Approval task.

Configuring Approval Hierarchy and Notifications

The predefined approval chain includes the manager of the manager of the worker being evaluated. However, you can add additional levels of approvers and other roles, such as HR specialist. Other roles must have the correct privilege for approvals and a data security profile that lets that includes access to the worker whose performance document they're asked to approve. You set up approvals and the associated notifications using the Define Approval Management for Human Capital Management task. To add the HR specialist as an approver, you must also add an area of responsibility for the HR specialist using the Areas of Responsibility task in My Client Groups > Quick Actions > Show More > Areas of Responsibility.

Configuring Approval Rules

HR specialists can configure an approval rule for performance documents to use the current assignment hierarchy instead of the primary assignment in a hierarchy. So if they submit a performance document on an employee's nonprimary assignment for approval, it's routed using the nonprimary assignment hierarchy.

You can set up multiple level approvals for performance documents using the manager's current or primary assignments. If a performance document has multiple levels of approvals and the approvers have multiple assignments, then you can route approvals using the assignment hierarchy of the employee, or route them using the manager's primary assignments.

If multiple approval rules exist, HR specialists can use parallel approvals in an approval rule to send approval requests to multiple participants at the same time. Only the first person to respond needs to process the approval.

Notifications

When you activate notifications, each approver receives worklist and email notification that a document was submitted for approval. The notification contains a link to the performance document so the approver can view it. When all approvers have approved or rejected the document, the worker's manager receives notification whether the document was approved or rejected. The approval process is repeated if a manager resubmits a document after rejection, or a second approval task is configured in the process flow. If the performance document is approved, the next task in the process flow becomes available or if the approval is the last task, the performance document is completed. If the approval is rejected, then the previous task in the process flow becomes the current task so any requested changes can be made before the approval task is resubmitted.

Actions for Performance Document Approvals

When a manager submits a performance document for approval, this action starts the transactional approval task.

Let's discuss what happens after this event and the impact of other approval actions on the status of the performance tasks. Approvers receive notification that the document is ready for approval. They can approve or reject the document in multiple locations. They can also perform other actions, such as requesting more information, or reassigning or delegating the approval to someone else.

If a second approval task is required for a document, the normal process applies. For example, you can have two approval tasks connected by the same performance document with separate approval transactions. In this case, the approval tasks could be an approval to review what to evaluate, and another approval to review the evaluation and discuss ratings.

Approval Actions

As part of the approval process, approvers can take a number of actions on a performance document. These actions include:

- Approve
- Reject
- Request Information
- Reassign
- Delegate
- Suspend
- Resume

The locations where approvers can perform approval process actions are shown in the table.

Location	Details
Worklist, email notifications, and performance document	Use the Actions menu to approve or reject the document, or perform other approval process actions. Not all actions are supported in the email notifications. You approve or reject the approval once only. Use the worklist, email, or a link in the performance document. Select the Approve or Reject buttons on the performance document. No other approval process actions are available on the performance document.
Transaction Console	HR specialists use the Transaction Console to perform approval process actions, such as: reject, terminate, and so on.

Task Status After Rejection

If a performance document is rejected, the Manager Evaluation of Workers task is set to **In progress** so the manager can update the document. If you need to change the status of other tasks before resubmitting the manager evaluation, the HR specialist can use the Performance Documents task.

Reassign and Delegate

Approvers can either reassign or delegate approval to another manager. Reassignment and delegation are valid only for one approval task.

Bypass

Bypass the Performance Approval task to separate it from the transactional approval task. Continue the evaluation process when approvers are unable to approve the performance document. For example, if they're on leave. Bypassing the performance approval task automatically aborts the transactional approval task. The HR specialist can advance the performance document to the next task using the Performance Documents task.

Terminate

If the transactional approval task is terminated, then HR specialists can bypass the performance approval task to move it to the next task.

Related Topics

- [Options for Performance Process Flow Setup](#)
- [How You Define Approvals for Human Capital Management](#)
- [Approval Management Configuration Options for Oracle Fusion Human Capital Management](#)
- [Manage Workflow Transactions](#)
- [How You Manage HCM Approval Transactions](#)

Performance Payload Attributes

You can use the performance payload attributes listed in the following table when defining approval conditions in the Transaction Console.

Condition	Attribute Value to Enable Manual Approval	Description
attribute1	User defined value.	Performance document name.
attribute2	User defined value.	Primary line manager sign in or username.
attribute3	User defined value.	Workers display name.
attribute4	System generated value, sequence.	Evaluation ID.
attribute5	System generated value, sequence.	Worker ID.
attribute6	System generated value, sequence.	Manager ID.
attribute7	User defined value.	Primary approval manager sign in or username.
attribute8	System generated value, sequence.	Worker assignment ID.
attribute10	User defined value.	Performance template name.
attribute11	User defined value.	Performance process flow name.
attribute12	User defined value.	Performance document type name.
AttributeNumber1	User entered value.	Manager overall summary numeric rating.
AttributeNumber2	Dynamic value.	Manager overall summary calculated score.

12 Performance Template Sections

Considerations for Creating Performance Template Sections

You must create a section for each task that requires a section used in the process flow. You create sections using the Performance Template Sections task in the Setup and Maintenance work area.

When you create a section, remember to specify the type. Depending on the type, you can also set these items:

- Whether the section is rated or weighted
- Which calculation method to use to determine worker ratings, if using calculated ratings
- Which rating model to use to rate workers
- Content item processing options
- Content items to include

After you create the sections, they're available for you to use in the performance template. In the performance template, you can create sections or select and edit previously-created sections.

Section Types

The section types are:

- Profile Content, to rate worker competencies
- Performance Goals, to rate worker performance goals
- Development Goals, to rate worker development goals
- Questionnaire, to allow managers, workers, and participants to provide feedback about the worker
- Overall Summary, to provide the overall rating of the worker
- Worker Final Feedback
- Manager Final Feedback

Note: Note that competency sections with a text field type aren't supported in performance documents.

You must define a section for the tasks that appear in the process flow that require a section. Each section corresponds to an evaluation topic or section in the performance document.

Did you know that you can include multiple competency type sections? Use them to evaluate different groups of competencies separately. For example, configure a competency section to populate with competencies for an employee's job profile. Configure another to populate with the organization's competencies.

Note: To add multiple competency type sections, you must first enable Enhanced Talent Profile Management. For information about how to upgrade to the Enhanced Talent Profile Management, see [Upgrading Oracle Cloud HCM Profile Management on My Oracle Support \(Doc ID 2421964.1\)](#). Then you can define competency sections using the Competencies Template in Enhanced Talent Profile Management.

The tasks that require a section, and the sections that you need to include are in the table.

Task	Required Section
Set Goals	At least one of: • Profile Content (for Competencies) • Performance Goals • Development Goals
Worker Self-Evaluation Manager Evaluations of Workers	At least one of: • Profile Content (for Competencies) • Performance Goals • Development Goals • Overall Summary
Manage Participant Feedback	At least one of: • Profile Content (for Competencies) • Performance Goals • Development Goals • Overall Summary • Questionnaire
Worker Provides Final Feedback	Worker Final Feedback
Manager Provides Final Feedback	Manager Final Feedback

Section Ratings and Weighting

For the Profile Content (for Competencies), Performance Goals, Development Goals, and Overall Summary sections, you can select whether to enable section ratings, comments, or both. When you enable section ratings and comments, managers, workers, and participants can select a rating for the section and provide comments. For the Profile Content (for Competencies), Performance Goals, and Development Goals sections, they can rate the section separately from the individual content items contained within the section. For the Profile Content section, the content items are competencies. The Performance Goals section contains performance goal items. The Development Goals section contains development goal items.

Managers, workers, participants, and matrix managers can use the calculated ratings as a guide to manually select their ratings. For the Profile Content, Performance Goals, and Developments Goals sections, the application calculates ratings based on ratings on individual items in the section. For the Overall Summary section, the application calculates ratings using the section ratings from the Profile Content, Performance Goals, and Development Goals sections

You can select to weight a section, or items, in a section to place more or less importance on the section or item. The application can use the weights to calculate section and overall ratings.

If you have multiple competency sections, you can configure them differently to determine who sees it and whether it's rated. If you have additional competency sections which are rated, then the application considers them in the overall rating if it's calculated, and their weights if configured.

Calculation Rules

You can have the application calculate the employee's performance rating in addition to having workers and managers manually enter ratings in these sections:

- Overall Summary
- Profile Content
- Performance Goals
- Development Goals

For the Overall Summary section, the application uses the calculation rule you select to determine overall ratings for performance based on the calculations for the Profile Content (for Competencies), Performance Goals, and Development Goals sections. Select one of these calculation methods for the sections:

- Average
- Sum
- Band
- Fast formula

For the calculation rules, you must also specify these items:

- Fast formula (if used)
- Decimal places
- Decimal rounding rule
- Mapping metric
- Mapping method

Rating Models

In the Overall Summary, Profile Content (for Competencies), Performance Goals, and Development Goals sections, you use rating models to rate the workers. You set up rating models in the profile management business process using the Profile Rating Models task in the Setup and Maintenance work area. If you use a particular rating model to rate the items in a section, you can do one of these actions:

- Use the same rating model to rate the section itself
- Select a different model to rate the section

Content Item Processing

For the Profile Content, Performance Goals, and Development Goals sections, you select the ratings and calculation rules to use to determine rating scores for the content items, goals, and competencies, if your organization uses calculated ratings. If you use performance rating types for the section, you can select different rating models to rate individual items in the section. The calculation rules are applied to each item, then combined using the calculation rule you selected for the section to determine the section rating. To use this feature for the Profile Content (Competency) sections, you can select **Proficiency**, **Performance**, or Proficiency and **Performance** as the rating type. For the

Performance Goals and Development Goals sections, the **Performance** rating type applies automatically. Only items added directly to the template are eligible for separate rating models. Items added to the performance document by managers or workers use the performance rating model specified for the section.

Section Content

In the Section Content section, you specify the source of content items. You can also designate additional items to appear in the section.

Information Sources for Profile Content Section

For the Profile Content section, you can select to populate competencies from the model profile related to the worker's job, job family, position or organization. You can also select a specific profile from which to populate competencies. Profiles are maintained in profile management business process. When you create the performance template you can also add competencies directly to it. Weights and minimum weights associated with competencies from a model profile are also populated in the performance document.

Workers and managers can use the update action in the performance document to include new competencies added to the profiles configured for the section. The document updates to include additional content added to the model profiles since the performance document was created or last updated. The weight and minimum weight are only populated in the performance document when the competency is added to the performance document. Subsequent changes to the competency weight and minimum weight in the model profile don't update the weights for competencies that already exist in the performance document.

Writing Assistant

In the Profile Content section, you can select **Enable the writing assistant for manager** to assist managers in writing useful comments about worker competencies in the performance document. The writing assistant feature provides suggestions for comments that are associated with competencies and their correlated proficiency levels.

Information Source for Performance Goals Section

For the Performance Goals section, select **Populate with Worker Goals** to add goals from goal plans in the goal management business process to the performance document. To update goals in performance documents with weights that are revised in the goal management business process, select **Allow update goals action to update goal weights from goal management business process**.

The Evaluation Type which is configured in the Performance Goal template section determines how a goal plan is evaluated in a performance document.

If employees have more than one goal plan that needs to be evaluated in a performance document, that can be configured differently in the performance template section. For example, a person goal plan could be configured to provide ratings and comments at the goal level and an organization goal plan configured to only provide a section rating and comment. The evaluation type determines which goal section the goal plan maps to and how it will be evaluated. When you create a performance document, goal plans that have the same evaluation type as performance goal sections defined in the performance template are automatically added as evaluation topics.

When managers or workers edit the worker's goals in the goal management business process that already exist in the performance document, the changes are updated in the document using two methods:

- When the manager or worker opens the performance document, all edits to performance goals, except weights, are reflected in the performance document.

- When the manager or worker uses the Update Goals action in the performance document, goal edits, including weights appear in the document.

To populate the performance document with new performance goals from the goal management business process they must use the Update Goals action.

Information Source for Development Goals Section

To add goals from the career development business process, select **Populate with workers development goals covering any part of evaluation period** in the Development Goals section for the relevant time period. You can select additional options to determine which development goals appear in the performance document:

- Include future development goals starting after evaluation period
- Exclude inactive development goals

When managers or workers edit the worker's existing goals in the career development business process, the changes are reflected in the performance document when it's opened. To populate the performance document with new development goals from the career development business process, they must use the **Update Goals** action in the performance document.

Content Items

You can add content items to the Profile Content, Performance Goals, and Development Goals section definitions. When you use those sections in the performance template select the **Load Items from Section** action on the Content tab to add the items to the template. The content items in the template appear in the performance documents created from the template.

Related Topics

- [Profile Types](#)

How can I create multiple competency type sections?

Create multiple competency type sections to evaluate different groups of competencies separately.

Here's a list of configuration options:

- Configure a competency section to populate with competencies for an employee's job profile.
- Configure a competency section to populate with the organization's competencies.
- For multiple competency sections, you can configure them differently to determine who sees it and whether it's rated.
- If you have additional competency sections which are rated, then the application considers them in the overall rating if it's calculated, including the section weights.

To add multiple competency type sections, you must first enable the Enhanced Talent Profile Management. For information about how to upgrade to the Enhanced Talent Profile Management, see Upgrading Oracle Cloud HCM Profile Management on My Oracle Support (Doc ID 2421964.1). Then you can define competency sections using the Competencies Template in Enhanced Talent Profile Management.

1. Go to **My Client Groups > Performance**. Select **Performance Template** in the **Setup Maintenance** region.

2. Select the **Structure** tab in the **Performance Template** page. In the **Section Processing** region, select the profile content as the Section Type.
3. Select the profile competency section name. This is based on the Competencies Template you defined in Enhanced Talent Profile Management.
4. Repeat steps 2 and 3 to add more competency sections to the performance template.

Employees and managers can select the multiple competency sections from Evaluation Topics on the Performance Document page.

After you enable Enhanced Talent Profile Management, the performance template doesn't support the configuration **Use specific profile**. Instead you can create an additional competency section in the performance template. For example, if you use the **Use specific profile** for organization competencies with Classic Profile Management enabled, then in Enhanced Talent Profile Management, you can define a new Profiles Competency Section to include the organization competencies as the specific profile.

Considerations for Adding or Removing Competencies in Talent Profile Competency Sections

Here are some things to consider when adding or removing competencies in talent profile competency sections.

- Competencies added by managers or employees to the performance document are added to the employee's talent profile with the evaluator type configured in the performance template.
- Talent profile approvals aren't triggered when adding or removing a competency directly in a performance document person profile competency section. If you use approvals in talent profiles and don't want these to be bypassed in the performance document, you can use personalization to hide the add and remove buttons in the performance document.
- Any changes made to competencies in a person profile competency section in a performance document will update any other in-progress performance documents with person profile competency sections where the set goals or evaluation tasks aren't complete. For example, if a new competency is added in a midyear performance document, that competency is displayed in the employee's talent profile and added to the end of year performance document, if created.
- You can exclude competencies that don't need evaluating by marking them as not ready to evaluate, rather than removing them from the performance document.
- Only competencies added directly in performance documents can be deleted. Competencies in an employee's talent profile that have come from another source, can't be removed in performance documents, and must be removed from the original source.
- Competencies deleted by employees won't be removed from other in-progress performance documents if they've already been evaluated by the manager. If a competency is removed from an employee's Talent person profile but has been evaluated in a performance document and has ratings or comments from a contributor (worker, manager, or participant) then it won't be removed from the performance document. If the ratings or comments are removed and the performance document is updated, then the competency is removed from the performance document.

Update Performance Document Model Profile Competency Sections

You can use the Update Performance Document Model Profile Competency Sections process to update competency sections in performance documents populated using a model profile.

You can run the process to add any new competencies or remove unevaluated competencies (no rating or comments added) that were added to job, position, or organization profiles to performance documents that use those profiles. This process is available at **My Client Groups > Performance > Process Mass Actions for Performance Documents**. When you submit it, it only updates in-progress performance documents. In-progress performance documents are documents where the evaluation tasks, worker self-evaluation, manager evaluation, and manager participant feedback are incomplete.

If performance documents include competencies that are no longer relevant, then you need to manually remove them. Competencies that are end dated in Profile Management aren't automatically removed from performance documents.

Populate Performance Documents With Person Profile Competencies

You can configure a competencies performance template section so that it populates the competencies from the employee's Talent person profiles in their performance documents.

This gives employees the opportunity to be evaluated on other individual competencies that aren't populated based on their job, position, or organization. Note that **Use specific content items** isn't supported for person profile competency sections. If competencies need to be evaluated in the performance document they should be added to the employee's person Talent profile first.

1. Ensure that you've set the `ORA_HRA_PERSON_PROFILE_COMP_SECTION_ENABLED` profile option to Yes.
2. Go to **My Client Groups > Performance > Performance Template Sections**.
3. Select the competencies section type from the **Section Name** drop-down list. This lists the competency sections defined in Profile Management.
 - a. The competency section defined in Profile Management must be associated with an Item Value Set and have at least one Evaluator Type configured that's visible to both employees and managers.
4. In Section Content, select **Populate with competencies using profile** and then select **Person** as the Profile Type. This validates if the Competencies Section Name defined in Profile Management has at least one Evaluator Type configured that's visible to both employees and managers.
5. Complete details in the Processing By Role section.
6. Submit the details.

Calculated Ratings

You can set up calculated ratings to automatically calculate ratings in performance documents.

The calculated rating is derived from a score calculated from ratings provided by workers, managers, and participants using the calculation rules defined in the sections. The calculated score is mapped to the actual calculated rating based on the rating model used for the section.

In the performance template and performance template section, you can set up performance documents to:

- Calculate and display the ratings provided by workers, managers, matrix managers, and other participants.
- Display calculated ratings along with, or instead of, manual ratings.
- Use the provided calculation rules or company-defined fast formulas to calculate ratings.

Where Calculated Ratings Appear

Calculated ratings appear at the top of the section for which they apply. To view calculated ratings, all roles must use the calculator link that appears at the top of the section. Everybody who rates the worker can see their own calculated ratings, if configured to do so. Managers and matrix managers can view calculated ratings provided by the worker and participants.

The calculated rating appears as stars when star ratings are configured. The rating level description for the calculated rating appears when star ratings aren't configured. In both cases, the calculated score appears in parentheses after the ratings. The calculated rating is rounded to the closest rating level value as determined by the rounding and mapping settings.

Calculated Ratings and Compensation Management

Calculated overall ratings, along with overall ratings provided by managers, can be used by Oracle Fusion Compensation Management. The settings to determine whether they appear there are available in the Compensation Management. The calculated ratings that appear in Compensation Management are the calculated scores.

Calculated Ratings Roll Up

You can set up the template so that any or all of the sections use calculated ratings. When you enable calculated ratings in the Profile Content, Performance Goals, or Development Goals sections, here's how it's used:

- The ratings provided by managers, workers, matrix managers, and other participants on individual items in the section are used for rollup calculations.
- This determines the rating for the respective section.
- This rating is then used to determine the overall calculated rating in the Overall Summary section.

How You Use Fast Formulas in Performance Documents

You can configure fast formulas to calculate section ratings for workers in a performance document.

Fast Formulas and Database Items

Fast formulas contain the items and rules used to calculate the section rating, and can be based on ratings provided on the items by workers, managers, and participants. You create the fast formulas using the Performance Rating Calculation type. To the fast formula you add Database Items (DBI). These items can calculate ratings on attributes besides the overall item rating. For example, you can use DBIs to rate other attributes on a goal, such as the measurement attributes, rather than the overall goal. You create fast formulas using the Manage Fast Formulas task in the Setup and Maintenance work area.

For more information, see the Complete List of HRA Database Items for Calculated Ratings (Doc ID 2444793.1) on My Oracle Support at <http://support.oracle.com>.

Calculated Rating Setup in the Performance Template Section and Performance Template

You configure the sections of the performance document to use fast formulas. Fast formulas can calculate ratings for the Overall Summary, Profile Content (Competencies), Performance Goals, and Development Goals sections. You can set up any, or all, these sections in a performance document to calculate ratings.

In the section, you must select the fast formula calculation rule. In addition, you select the fast formula rule. To use calculated ratings, you must also select the option to use calculated ratings on the Process tab of the performance template. You also must select which roles can see calculated ratings.

Guidelines for Setting Up Calculated Ratings in Performance Templates and Sections

You can use calculated ratings to automatically calculate a worker's overall performance rating in the Overall Summary section, and section ratings in the Profile Content, Performance Goals, and Development Goals sections.

To configure calculated ratings, you select from the following options:

- Calculated ratings activation and display options
- Section rating model and calculation rules
- Decimal places
- Decimal rounding rule
- Mapping metric
- Mapping method

You configure calculated ratings for the template on the Process and Structure tabs of the performance template. You can also configure sections using the Performance Template Sections task.

Calculated Ratings Activation and Display Options

On the Process step of the performance template, select **Calculate ratings** to enable the application to calculate section ratings. When you select this option, all sections for which ratings are enabled, use calculated ratings. The overall summary rating is always calculated using the calculated section ratings, not the manually entered section ratings.

You select from the following options to display the ratings, which apply to all sections:

- **Display calculated ratings to worker**
- **Display calculated ratings to manager**
- **Display calculated ratings to participants**
- **Display calculated ratings to matrix managers**

Calculated ratings of matrix managers and other participants display to both managers and workers if they're allowed to see manually entered ratings.

If you select **Use calculated ratings only**, the following applies:

- Only calculated ratings appear and managers, workers and participants can't enter ratings manually.
- Calculated ratings become the official section ratings.
- Although only the calculated section ratings display in the performance document, both calculated and manual section ratings are populated in the database. When the performance document is complete, the ratings are passed to Profiles.

Section Rating Model and Calculation Rules

To enable calculated ratings in a section, you must select a rating model for the section, for example Performance Rating Model, Language Rating Model, or Proficiency Rating Model.

In addition, you must select the type of calculation rules to use for rating the section. The options are:

- Fast formula
- Average
- Sum
- Band

You can specify the calculation rules either using the Performance Template Sections task, or on the Structure tab of the performance template.

You can select different calculation rules for each section within a performance template. The calculation rules for the Overall Summary section is used to determine the calculated overall rating.

For the Average, Sum, and Band methods you can weight sections and items within the sections. Weights let you place more or less importance on particular sections and items.

Decimal Places

You can select the number of decimal places, up to a maximum of two, that appear in the performance document or Compensation Management pages for the calculated numeric score used to determine the calculated rating. The default value is 2.

Decimal Rounding Rule

In the performance section, you select the rounding rules to determine how the calculated numeric score is rounded to the final value. The rounding is applied to the rounding decimal, which is the last decimal set in the Decimal Places field. For example, if you set the Decimal Places value at **2**, the rounding is applied to the second decimal. The default value is **Standard**.

The table shows the available rounding rules, the effects of selecting each rule, and examples of how the rules are used to determine calculated ratings.

Rounding Rule	Effect	Example
Standard	Rounds up when the rounding decimal is 5 or greater, and down when the rounding decimal is 4 or less.	If the calculated rating is 3.4867, and the decimal place setting is 2, the final calculated rating is 3.49. If the calculated rating is 3.4849, and the decimal places setting is 2, the final calculated rating is 3.48.
Up	The value always rounds up.	If the calculated rating is 3.4940 or 3.4960 and the decimal place setting is 2, the final calculated rating is 3.50. If the calculated rating is 3.49 and the decimal place setting is 2, the final calculated rating is 3.50.
Down	The value always rounds down.	If the calculated rating is 3.4940 or 3.4960 and the decimal place setting is 2, the final calculated rating is 3.49.

Mapping Metric

The mapping metric determines how to map the calculated numeric score to a rating level in the rating model. You can select either of these attributes of the rating model to map the calculated score of the section to the rating level:

- **Numeric rating:** Maps the calculated numeric score to the single-value numeric rating, and the corresponding rating level. Numeric rating is the default for the Average and Fast formula calculation rules for the section.
- **Points range:** Maps the calculated numeric score to the points range and the corresponding rating level. Points range is the default for the Band calculation rule for the section.

Mapping Method

The mapping method determines the rating when no exact match exists between the calculated rating and a rating level from the rating model used in the section. When rounding rules are used, the calculated rating value is mapped after the rounding rule is applied.

The table shows the available mapping methods and the effects of selecting each one.

Mapping Method	Effect for Numeric Rating Mapping Metric	Effect for Points Range Mapping Metric
Highest	Uses the next numeric rating greater than the calculated average.	Uses the next review point greater than the calculated average.
Lowest	Uses the next numeric rating less than the calculated average.	Uses the next review point less than the calculated average.
Nearest	Uses the numeric rating closest to the calculated average.	Uses the review point closest to the calculated average.

Using the numeric rating for metric mapping, for example, assume the rating model has the following entries for numeric rating and short description:

- 1-Weak
- 2-Poor
- 3-Average
- 4-Good
- 5-Excellent

If the application calculates a rating of 3.2 (between Good and Average, but closer to Average), the mapping method determines which entry the application uses:

- Highest yields the next numerically highest rating--in this case 4, or Good.
- Lowest yields the next numerically lowest rating--in this case 3, or Average.
- Nearest yields the numerically closest rating--in this case 3, or Average.

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

Related Topics

- [Overview of Using Fast Formulas](#)

Considerations for Using Performance Template Section Calculation Rules

To use calculated ratings, you must select the type of calculation rules to use for rating Profile Content, Performance Goals, Development Goals, and Overall Summary performance template sections.

You can change the calculation rule for the section selected in the performance template where the section is used. The options are:

- Average
- Sum
- Band
- Fast Formula

Each of these settings has a default mapping metric to help determine the final numeric level to assign to the rating. However, you can change the mapping metric from the default to another. The mapping metric options are:

- Numeric rating
- Points range

To use numeric ratings, the rating model configured to rate the section and items in the section must have the numeric rating attributes defined for the rating levels. To use the points range, the rating model must have defined review points as well as point ranges (from points and to points).

Average Method

To use this method, the rating models associated with the section and its content items must define numeric ratings that correspond to the rating descriptions. The application first calculates the average of the item ratings to determine the section rating. Then the application calculates the average of the section ratings to determine the overall rating. The application uses the numeric ratings to calculate a weighted average if weights are configured to be used; otherwise, it calculates a straight average. It then converts this average back to a performance document rating, using the rating model.

This is how the average is calculated:

- The average of the item ratings is calculated to identify the section rating.
- The average of the section ratings is calculated to identify the overall rating.
- The numeric ratings are used to calculate a weighted average if weights are configured to be used. Otherwise, the numeric ratings are used to calculate a straight average.
- The weighted or straight average is converted back to a performance document rating using the rating model.

This is how the points range mapping metric works:

- It calculates the total numeric score using the numeric ratings defined in the rating model
- It converts this total into the corresponding review rating for the section by mapping the total numeric score to the points range

Sum Method

To use this method, the rating models associated with the section and the items in the section must also use numeric ratings. Here's how this method works:

- It uses the numeric ratings as defined in the rating model
- It calculates the total numeric score
- It converts this total into the corresponding review rating for the section by mapping the total numeric score to a rating level
- It ignores items without ratings

When using the sum method for the overall rating, section rating calculation rules can be sum or average only.

This is how the points range mapping metric works:

- It uses the numeric ratings as defined in the rating model
- It calculates the total numeric score
- It converts this total into the corresponding review rating for the section by mapping the total numeric score to the points range
- It ignores items without ratings

Band Method

This method is similar to the sum method, but is available only for the Overall Summary section of a performance document. The Profile Content, Performance Goals, and Development Goals sections, however, use the average or sum

method. To use the band method, the rating model that's associated with the Overall Summary section must define review points as well as point ranges (from points and to points).

In this method, during the calculation process, the total numeric score across all sections is calculated and then the total is mapped into the equivalent rating level using the points range.

For numeric rating metric mapping, the total numeric score across all sections is calculated and then the total is converted into the corresponding review rating for the section by mapping the total numeric score to a rating level.

Fast Formula Method

Fast formulas are formulas you create from Performance database items. By default, these use numeric ratings metric mapping. For numeric ratings, the total numeric score based on the fast formula is calculated. This is then mapped to the rating level.

For the points range mapping metric, the total numeric score based on the fast formula is calculated. This total is then mapped to the equivalent rating level using the points range.

You can't configure weights to be applied to the results of a fast formula. However, you can build weights into the fast formula.

Related Topics

- [Overview of Using Fast Formulas](#)

Options for Item Processing in a Performance Template Section

When you enable content items for a section, you specify the rating type, item calculation, and properties.

You configure item processing on a section using the Performance Template Sections task in the Setup and Maintenance work area.

Rating Type

Rating types determine the rating models that are available for workers and managers to use to select the content item ratings in the performance document and to calculate the item ratings.

Let's look at the available rating types for Profile Content sections:

- **Proficiency:** Workers and managers can select the proficiency level for items on the performance document.
- **Performance:** Workers and managers can select the performance rating on the performance document.
- **Proficiency and performance:** Workers and managers can select both a proficiency level and a performance rating on the performance document.

For the Performance Goals and Development Goals sections, only the Performance rating type is available.

When you select either Performance or Proficiency and performance rating types, you can use the same rating model for content items that the section uses, or select another. You can also select different performance rating models

for individual content items. This enables your organization to rate some performance goals that may be specific to a department using a different rating model than that used for organization-wide goals, for example.

Check out the proficiency levels in the Oracle Fusion Profile Management when the performance document is completed. Performance ratings for competencies and goals aren't published to Profile Management.

Item Calculation

The item calculation method determines how the item is rated.

When the rating type is Proficiency and performance, you can select:

- **Proficiency:** Proficiency ratings calculate the score for a specific item.
- **Performance:** Performance ratings calculate the score for a specific item.
- **Proficiency multiplied by performance:** The application multiplies the proficiency point value by the performance point value to calculate the score for a specific item.

You can't change the default values for the item calculation method if the rating type is either Proficiency or Performance.

Properties

Select the attributes you want to make available for items.

The effects of selecting the properties are shown in the table.

Property	Effect
Target Proficiency Level	Target proficiency levels appear for the items in the performance document. The target proficiency level that appears is the minimum proficiency level for the competency set in the profile type used to populate the performance document. For example, you select job profile as the profile type used by the section. The target proficiency levels in the performance document is the minimum proficiency level for the competencies belonging to the worker's job profile.
Target Performance Rating	You can select target performance ratings for the items you add to the section or the performance template. In the performance document, workers can select target performance ratings for items they add to the document. Managers can select target performance ratings for items that they, or the workers, add.
Weight	You can enter weights for items in the section and the performance template to determine the relative importance of the items within the section. In the performance document, managers and workers can change weights for: • Items they add to the document • Performance goals added from the goal management business process • Development goals added from the career development business process When using calculated ratings, the weights are used only when you select the Average calculation rule for the section. Even if calculated ratings aren't enabled, weights can still be viewed and edited.
Minimum Weight	You can enter minimum weights for items in the performance template. You can't enter minimum weights into the performance document. The minimum weights you enter for competencies and performance or the development goals you add in performance template display

Property	Effect
	in the performance document. The minimum weights you enter for competencies in model profiles which are used to populate the performance document also display.
Required	In the performance template section or the performance template, select the Required check box to prevent workers and managers from editing or deleting the item in the performance template from the performance document.

How Performance Ratings Using the Average Method Are Calculated

You can use the average calculation rule to calculate ratings for each section and the overall rating. You can also calculate ratings using various rating models and apply weighting, when weighting is selected.

You select calculation rules for sections using the Performance Template Sections task in the Setup and Maintenance area or Performance pages.

Settings That Affect Average Rating Calculations

The factors that determine average rating calculations are the:

- Rating models that are selected for each section and content item
- Weighting, which is optional, and can vary between sections and content items

How Performance Ratings Are Calculated

In the average method, the average of the content item ratings is calculated first to work out the section rating. Then the average of the section ratings is calculated to determine the overall rating. The ratings are calculated using precise values throughout the calculation process, and rounding is applied at the end. Rounded values can appear in the performance document for the sections and overall ratings. The number of decimals displayed is determined in the performance template section.

Example: Average Method Without Weighting

ABC Company uses the same rating model for the Competencies, Performance Goals, and Overall Summary sections, with no weighting. The performance document contains no Development Goals section. The rating model has five levels in the scale, and the numeric values are 1, 2, 3, 4 and 5. Assume that all content items use the same rating model. The performance template is set up to use the standard rounding rule, and the overall rating is set to display to two decimal places. The mapping method is Nearest.

Assume the following performance template section configurations:

- Decimal rounding rule is Standard
- Decimal display is 2
- Mapping metric is Numeric Rating

- Mapping method is Nearest

The following table shows the ratings for the Competencies section.

Competency	Item Numeric Rating	Maximum Numeric Rating from Rating Model	Decimal Score (Item Rating / Maximum Rating)
Teamwork	4	5	0.8
Leadership	3	5	0.6
Communication	2	5	0.4
Analytical Skills	4	5	0.8
Ethics	5	5	1.0
Conceptual Thinking	4	5	0.8

The sum of the decimal scores is 4.4, from a possible maximum of 6.0. The 4.4 must be converted to a value on the rating model for the section. The section maximum numeric rating is 5, so the formula to calculate the section rating is:

(Total Decimal Score) / (Total Maximum Decimal Score) x (Maximum Numeric Rating from Section Rating Model), or in this example: $(4.4 / 6) \times 5 = 3.67$.

In this example the calculated section rating for competencies is 3.67 out of 5, which maps to a numeric rating of 4.

The following table shows the ratings for the Performance Goals section.

Goal	Item Numeric Rating	Maximum Numeric Rating from Rating Model	Decimal Score (Item Rating / Maximum Rating)
Increase sales revenue	5	5	1.0
Cut expenses	3	5	0.6
Grow business in Asia	5	5	1.0
Participate in mentoring	5	5	1.0

The sum of the decimal scores is 3.6, from a possible maximum of 4.0. The 3.6 must be converted to a value on the rating model for the section, just as for the Competencies section. The section maximum numeric rating is 5, so using the same formula to calculate the section rating as for competencies, the section rating is: $(3.6 / 4) \times 5 = 4.5$.

In this example the calculated section rating for goals is 4.5 out of 5, which maps to a numeric rating of 5.

To determine the overall rating, the average numeric rating for the two sections is calculated. The overall rating calculation is: $(4.0 + 5.0) / 2 = 4.5$. The calculated overall rating maps to a numeric rating of 5.

Example: Average Method with Weighting

The following year, ABC Company uses the same rating model for the Competencies, Performance Goals, and Overall Summary sections as in the previous example. But, the company applies weights to the sections and individual content items. The weights determine the relative value of one section compared to another section, or content items to one another. Any content items that don't have weights are ignored in the calculations. Here's what the validation process takes into account:

- Sum of the weights for content items within a section is 100.
- Sum of the sections that contain content items (the Competencies and Performance Goals sections) within a performance document is also 100.

The following table shows the ratings for the Competencies section.

Competency	Item Numeric Rating	Maximum Numeric Rating from Rating Model	Decimal Score (Item Rating / Maximum Rating)	Weight	Weighted Score (Decimal Score x Weight)
Teamwork	4	5	0.8	35	28.0
Leadership	3	5	0.6	5	3.0
Communication	2	5	0.4	10	4.0
Analytical Skills	4	5	0.8	20	16.0
Ethics	5	5	1.0	10	10.0
Conceptual Thinking	4	5	0.8	20	16.0

The sum of the weighted scores is 77.0, from a possible maximum of 100.0. The 77.0 must be converted to a value on the rating model for the section. The section maximum numeric rating is 5, so the formula to calculate the section rating is:

$(\text{Weighted Score}) / (\text{Total Maximum Weighted Score}) \times (\text{Maximum Numeric Rating from Section Rating Model})$, or in this example: $(77.0 / 100.0) \times 5 = 3.85$.

In this example the calculated section rating for competencies is 3.85 out of 5, which maps to a numeric rating of 4.

The following table shows the ratings for the Performance Goals section.

Goal	Item Numeric Rating	Maximum Numeric Rating from Rating Model	Decimal Score (Item Rating / Maximum Rating)	Weight	Weighted Score (Decimal Score x Weight)
Increase sales revenue	5	5	1.0	30	30.0

Goal	Item Numeric Rating	Maximum Numeric Rating from Rating Model	Decimal Score (Item Rating / Maximum Rating)	Weight	Weighted Score (Decimal Score x Weight)
Cut expenses	3	5	0.6	30	18.0
Grow business in Asia	5	5	1.0	25	25.0
Participate in mentoring	5	5	1.0	15	15.0

The sum of the weighted scores is 88.0, from a possible maximum of 100.0. The 88.0 must be converted to a value on the rating model for the section, just as for the Competencies section. The section maximum numeric rating is 5, so using the same formula to calculate the section rating as for competencies, the section rating is: $(88.0 / 100.0) \times 5 = 4.40$.

In this example the calculated section rating for performance goals is 4.40 out of 5, which maps to a numeric rating of 4.

To determine the overall rating, the sum of the numeric ratings for the two weighted sections is calculated, then that score is converted to the rating model scale. ABC sets the Competencies section weight to 40, and the Performance Goals section weight to 60. First, the decimal scores of the weighted sections are calculated:

- Competencies: $4 / 5 = 0.8$
- Performance Goals: $4 / 5 = 0.8$

Then the weighted scores for each section are calculated and added together. The total weighted scores are out of a possible 100.0 points:

- Competencies: $0.8 \times 40 = 32.0$
- Performance Goals: $0.8 \times 60 = 48.0$
- Total Competencies and Performance Goals: $32.0 + 48.0 = 80.0$

The scores are then converted to the rating model scale to determine the overall rating: $(80.0 / 100.0) \times 5 = 4.0$, which maps to a numeric rating of 4.

Example: Average Method with Weighting and Rating Model Variations

For a performance evaluation for a specific project, ABC Company uses various rating models for the Competencies, Performance Goals, and Overall Summary sections. The performance document contains no Development Goals section. The maximum numeric rating from each rating model is applied to calculate the scores. Different weights are also applied to the content items. Section weights are also applied. The performance template is set up to use the standard rounding rule, and the overall rating is set to display to two decimal places. The mapping method is Nearest.

Assume the following performance template section configurations:

- Section weights are applied
- Different weights are applied to the content items
- Decimal rounding rule is Standard
- Decimal display is 2

- Mapping metric is Numeric Rating
- Mapping method is Nearest

The following table shows the ratings for the Competencies section, which uses different rating models with different maximum ratings for the individual competencies. The section rating model differs from those used for the individual competencies, and the rating model maximum numeric rating is 7.

Competency	Item Numeric Rating	Maximum Numeric Rating from Rating Model	Decimal Score (Item Rating / Maximum Rating)	Weight	Weighted Score (Decimal Score x Weight)
Teamwork	4	5	0.8	35	28.0
Leadership	3	3	1.0	5	5.0
Communication	2	4	0.5	10	5.0
Analytical Skills	4	5	0.8	20	16.0
Ethics	5	5	1.0	10	10.0
Conceptual Thinking	4	4	1.0	20	16.0

The sum of the weighted scores is 84.0, from a possible maximum of 100.0. The 84.0 must be converted to a value on the rating model for the section. The section maximum numeric rating is 7, so the formula to calculate the section rating is:

(Weighted Score) / (Total Maximum Weighted Score) x (Maximum Numeric Rating from Section Rating Model), or in this example: $(84.0 / 100.0) \times 7 = 5.88$.

In this example the calculated section rating for competencies is 5.88 out of 7, which maps to the numeric rating 6.

The following table shows the ratings for the Performance Goals section. The Performance Goals section itself uses a rating model with a maximum rating of 6.

Goal	Item Numeric Rating	Maximum Numeric Rating from Rating Model	Decimal Score (Item Rating / Maximum Rating)	Weight	Weighted Score (Decimal Score x Weight)
Increase sales revenue	5	5	1.00	30	30.0
Cut expenses	3	5	0.60	30	18.0
Grow business in Asia	4	5	0.80	25	20.0
Participate in mentoring	4	5	0.80	15	10.0

The sum of the weighted scores is 78.0, from a possible maximum of 100.0. Because the maximum for the section rating model is 6, the section rating is: $(78.0 / 100.0) \times 6 = 4.68$, which maps to the numeric rating of 5.

To determine the overall rating, the sum of the numeric ratings is calculated for the two weighted sections, then it converts the score to the rating model scale. ABC sets the Competencies section weight to 40, and the Performance Goals section weight to 60. The overall summary section uses a rating model with a maximum score of 9.

First, the decimal scores is calculated for the weighted sections:

- Competencies: $6 / 7 = 0.85$
- Performance Goals: $5 / 6 = 0.83$

The weighted scores are then calculated for each section, and added together. The section weight for the Competencies section is 40, and for the Performance Goals section it's 60. The total weighted scores are out of a possible 100.0 points:

- Competencies: $0.85 \times 40 = 34.0$
- Performance Goals: $0.83 \times 60 = 49.8$
- Total Competencies and Performance Goals: $34.0 + 49.8 = 83.8$

The scores are then converted to the rating model scale to determine the overall rating: $(83.8 / 100.0) \times 9 = 7.542$. When the rounding rules and decimal places are applied, overall rating is 7.54, which maps to the section numeric rating 8.

How Performance Ratings Using the Sum and Band Methods Are Calculated

You can set up calculated ratings for each section and the overall rating using the sum method. You can use the sum method to calculate ratings using any rating model.

You can also use it to calculate the overall rating when at least one of the Profile Content, Performance Goals, or Development Goals sections uses the average method, and the others use the sum method.

Settings That Affect Sum and Band Rating Calculations

The factors that determine sum and band rating calculations are the:

- Rating models that are selected for each section and content item
- Numeric ratings and points ranges assigned to each rating level

Items without ratings aren't counted when calculating the ratings. For the band method, the numeric ratings must be associated with a points range. The rounding rules, mapping metric, and mapping methods must also be set in the performance template sections.

How Performance Ratings Are Calculated

In the sum method, the section rating is the sum of the numeric rating from the rating level for each content item. The overall rating is the sum of the numeric ratings for the section ratings.

For the band method, as in the sum method, the sum of the section rating is calculated. For the overall rating, the numeric rating total from the sections is converted to the points range associated with a rating level.

Example 1: Sum Method with Sum Sections

ABC Company uses the same rating model for the Competencies, and Performance Goals content items. The performance document contains no Development Goals section. The following table shows the rating levels and the numeric ratings assigned to each level.

Rating Level	Numeric Rating
1-Weak	1
2-Poor	2
3-Average	3
4-Good	4
5-Excellent	5

The following table shows the rating model used for the Competencies and Performance Goals sections, and the rating levels and numeric ratings assigned to each level.

Rating Level	Numeric Rating
1-Weak	5
2-Poor	10
3-Average	15
4-Good	20
5-Excellent	25

The following table shows the rating model for the Overall Summary section and the rating levels and numeric ratings assigned to each level.

Rating Level	Numeric Rating
1-Weak	10
2-Poor	20
3-Average	30

Rating Level	Numeric Rating
4-Good	40
5-Excellent	50

The following table shows the ratings for the Competencies section.

Competency	Item Numeric Rating
Teamwork	4
Leadership	3
Communication	2
Analytical Skills	4
Ethics	5
Conceptual Thinking	4

The score for the Competencies section is: $4 + 3 + 2 + 4 + 5 + 4 = 22$, which maps to the section numeric rating 4-Good.

The following table shows the ratings for the Performance Goals section.

Goal	Item Numeric Rating
Increase sales revenue	5
Cut expenses	3
Grow business in Asia	4
Participate in mentoring	4

The score for the Performance Goals section is: $5 + 3 + 4 + 4 = 16$, which maps to the section numeric rating 3-Average.

To determine the overall rating, the application adds the Competencies and Performance Goals sections: $22 + 16 = 38$, which maps to the section numeric rating 4-Good.

Example 2: Sum Method with Average and Sum Sections

For a performance evaluation for a specific project, ABC Company sets up a performance template that uses the sum method for the Overall Summary and Competencies sections, but the Performance Goals section uses the average method. In the Competencies section, the content items use a rating model different than that of the section itself. The section uses the same rating as the Overall Summary section. The Performance Goals section uses the same rating model for content items as the Performance Goals section itself.

The following table shows the rating levels and the numeric ratings assigned to each level for the individual content items in the Competencies section.

Rating Level	Numeric Rating
1-Weak	1
2-Poor	2
3-Average	3
4-Good	4
5-Excellent	5

The following table shows the rating levels and the numeric rating assigned to each level for the Competencies section itself.

Rating Level	Numeric Rating
1-Weak	10
2-Poor	20
3-Average	30
4-Good	40
5-Excellent	50

The following table shows the worker ratings for the Competencies section.

Competency	Item Numeric Rating
Teamwork	4

Competency	Item Numeric Rating
Leadership	3
Communication	2
Analytical Skills	4
Ethics	5
Conceptual Thinking	4

The sum of the item rating scores: $4 + 3 + 2 + 4 + 5 + 4 = 22$ is calculated. To determine the section rating, mapping rules for the rating model assigned in the performance template are used. In this example, the mapping rule is Nearest, which assigns the section a rating level of 2.

The following table shows the ratings for the Performance Goals section, which uses the average method.

Goal	Item Numeric Rating	Maximum Rating from Rating Model	Decimal Score (Item Rating / Maximum Rating)
Increase sales revenue	5	5	1.0
Cut expenses	3	5	0.6
Grow business in Asia	2	5	0.4
Participate in mentoring	4	5	0.8

The sum of the decimal scores is 2.8, from a possible maximum of 4.0. The 2.8 must be converted to a value on the rating model for the section. The section maximum numeric rating is 5, so the Performance Goals section calculated rating is: $(2.8 / 4) \times 5 = 3.5$.

To determine the Performance Goals final section rating, the mapping rules for the rating model assigned in the performance template are used. In this example, the mapping rule is Nearest and the calculated section rating for goals is 3.5 out of 5, which maps to a numeric rating of 4.

To determine the overall rating, the sum of the numeric ratings for the Competencies and Performance Goals sections is used: $20 + 4 = 24$, which maps to the section numeric rating 20.

Example 3: Band Method

ABC Company sets up a performance template in which the section ratings are calculated using exactly the same parameters as in the previous example, but the band method is used for the Overall Summary section to calculate the overall rating.

The following table shows the review point ranges set up for the Overall Section rating model to assign the rating level for the overall rating.

Rating Level	From Points	To Points
1-Weak	0	5
2-Poor	6	10
3-Average	11	25
4-Good	26	40
5-Excellent	41	50

To determine the overall rating, add the section numeric ratings from the previous example. The Competencies numeric rating is 20; the Performance Goals section numeric rating is 4. The total is: $20 + 4 = 24$. Using the total numeric rating and applying the point ranges shown in the table, the total score of 24 for the sections lies in the range of 11 to 25. The worker's overall rating is 3-Average.

How Managers Can Justify Difference in Manual and Calculated Ratings

If there's a difference in the calculated and manual section or overall ratings for an employee, managers can justify the difference by providing their comments.

They can provide the justification in the Manager Justification for Difference in Manual and Calculated Ratings field. This displays only if the configuration setting is enabled in Section Processing on the Structure tab of a performance template. If the manual rating changes or if calculated ratings are regenerated, the difference in ratings are processed again.

The manager entered justification is visible to these people:

- To the manager hierarchy and HR specialists with access to the performance document.
- To a matrix manager participant (if the participant role is configured with Allow role to view worker, manager and participant ratings, comments and questionnaires selected).

The justification isn't visible to the employee. And it's available to managers in the printable performance document.

The justification is enforced if you use the evaluate as manager task. It isn't enforced when updating performance documents using HCM Data Loader (HDL).

How You Set the Minimum and Maximum Character Limits for Evaluation Comments

You can specify the maximum and minimum number of characters that users should enter when they provide comments to support their evaluation.

You can use the setting in the Process tab of a performance template to set this limit. 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.

Note: The character limit isn't enforced when updating a performance document using HDL.

Writing Assistant

Writing Assistant is a tool that provides suggestions for a manager when writing comments or feedback for a worker's competency or rating level during performance evaluation.

Writing Assistant suggests statements associated with competencies and proficiency levels within those competencies, to help describe a worker's observed and wanted actions. The Writing Assistant data is displayed in the form of feedback suggestions and development tips. Use **Actions > Open Writing Assistant Excel Template** on the **Item Catalogs** page in the Profiles work area to generate the spreadsheet for uploading writing assistant data.

Requirements for Using Writing Assistant Data

Here's how you use the Writing Assistant tool:

- HR specialists upload data associated with a competency using an application-generated spreadsheet
- Managers select a proficiency level for a competency
- Managers view suggested comments for the selected proficiency level or for the competency as a whole
- Managers can copy and edit the suggested comments

Did you know that the application enables suggestions only for competencies that have a rating?

Related Topics

- [How You Upload Writing Assistant Data Using Spreadsheets](#)
- [Guidelines for Setting Up Performance Templates](#)
- [How Writing Assistant Works with Performance Documents](#)

How You Upload Writing Assistant Data Using Spreadsheets

Human resource (HR) specialists can upload and associate new Writing Assistant data for competencies using an application-generated spreadsheet.

Use the Export option on the Manage Content Items page in the Profiles work area to generate the spreadsheet for uploading writing assistant data. The uploaded data is associated with each separate competency.

The application-generated spreadsheet for uploading Writing Assistant data contains the following two worksheets:

- Feedback Suggestions - Upload feedback suggestions for each proficiency level for each competency.
- Development Tips - Upload development tips associated for each competency.

Generate the Spreadsheet

Here's how you generate the spreadsheet to upload and associate data for Writing Assistant with competencies:

1. Navigate to the Profiles work area.
2. Search for and select the **Items Catalog** task.
3. In the **Search Results** region, click **Actions > Open Writing Assistant Excel Template**. A **File Download** dialog box appears.
4. Click **Save**. Select a destination on your local hard disk to save the CompetencyFeedbackSuggestion.xlsx spreadsheet.

Upload and Update Feedback Suggestions

To upload feedback suggestions, specify all the required columns in the Feedback Suggestions worksheet and click **Upload**. After you click **Upload**, click **Save** to commit the feedback suggestions for proficiency levels for associated competencies into the application database.

To update an existing feedback suggestion, click **Download** to download all feedback suggestions for competencies into the spreadsheet. You can then update the suggested text and click **Upload**. After you click **Upload**, click **Save** to commit the feedback suggestions for proficiency levels for associated competencies into the application database.

Note: You can enter the same suggestion text for multiple competencies and for multiple proficiency levels.

Upload and Update Development Tips

To upload development tips, specify all the required columns in the Development Tips worksheet and click **Upload**. After you click **Upload**, click **Save** to commit the development tips for associated competencies into the application database.

To update an existing development tip, click **Download** to download all development tips for competencies into the spreadsheet. You can then update the suggested text and click **Upload**. After you click **Upload**, click **Save** to commit the updated development tips for associated competencies into the application database.

Note: You can enter the same suggestion text for multiple competencies.

Related Topics

- [Writing Assistant](#)
- [How You Set up Writing Assistant for Performance Documents](#)
- [How Writing Assistant Works with Performance Documents](#)
- [Guidelines for Using Desktop Integrated Excel Workbooks](#)

How You Set up Writing Assistant for Performance Documents

Set up the Writing Assistant feature to assist managers in writing useful comments in the performance documents of workers during a performance evaluation.

The Writing Assistant provides suggestions that are associated with competencies and their correlated proficiency levels to managers. The suggestions help managers describe observed worker actions, and those workers aspire to perform.

To set up the Writing Assistant, you must:

- Create the Profile Content section
- Upload development tips and feedback

Writing Assistant is available only for the Profile Content section type you configure for competencies.

Create the Profile Content Section

To set up the Writing Assistant, you must create and configure a Profile Content section for competencies. You create the Profile Content section using the Performance Template Section or the Performance Template tasks in the Setup and Maintenance work areas.

Select the **Enable writing assistant for manager** option in the **Section Content** section of the Create Performance Template Section page to make it available in the performance document.

The Writing Assistant provides suggestions only for competencies and their respective proficiency levels. If you set up the competencies section to use both proficiency levels and performance ratings, the Writing Assistant provides suggestions only for the selected proficiency levels. If you set up the section to use only performance ratings, Writing Assistant displays only development tips associated with the selected competency.

Upload Development Tips and Feedback

To use the Writing Assistant, you must also upload development tips and feedback suggestions for competencies using a spreadsheet loader. You upload development tips and feedback suggestions on the Item Catalogs page for competencies in the Oracle Fusion Profile Management business process.

Related Topics

- [How Writing Assistant Works with Performance Documents](#)

Create a Performance Template Section for Profile Content

This example demonstrates how to create a Profile Content section to rate competencies in the performance document and use calculated ratings to determine the overall rating.

To create a performance template section for Profile Content, follow these steps:

1. Go to **My Client Groups > Performance > Performance Template Sections**.
2. Click **Add** in the Performance Template Sections page.
3. Complete each section as described below.

Section Details

1. In the **Section Details** section, complete the fields as shown in this table.

Field	Value
Name	Competencies
Description	This section is used to rate competencies and calculate section ratings as part of the overall ratings. The section weight section is 40 to complement the Performance Goals section.
From Date	01/01/2025
To Date	12/31/2025
Status	Active

2. Click **Save**.

Section Processing

1. In the **Section Processing** section, complete the fields, as shown in this table.

Field	Value
Section Type	Profile Content
Section Rating Model	Any

Field	Value
Rate Section	Select
Calculation Rule for Section	Average
Decimal Places	2
Decimal Rounding Rule	Standard
Mapping Metric	Numeric Rating
Mapping Method	Nearest
Enable section comments	Select
Weight section	Select
Item Weight	40

2. Click **Save**.

Item Processing

1. In the **Item Processing** section, complete the fields, as shown in this table. Use the default values except where indicated.

Field	Value
Enable items	Select
Rate items	Select
Rating Type	Proficiency
Use section rating model for performance rating	Select
Performance Rating Model	Any

Field	Value
Item Calculation	Proficiency
Enable item comments	Select
Target Proficiency Level	Select
Target Performance Rating	Select
Minimum Weight	Select
Weight	Select
Required	Select

2. Click **Save**.

Section Content

1. In the **Section Content** section, complete the fields, as shown in this table. Use the default values except where indicated.

Field	Value
Use profile related to worker's job data	Select
Profile Type	Job profile type
Use specific content items	Select
Enable writing assistant for manager	Select

2. In the **Content Items** section, click **Add**.

3. In the **Content Items** section, complete the fields, as shown in this table. Use the default values except where indicated.

Field	Value
Item Name	Any
Target Proficiency Level	Any
Weight	Any
Required	Select

4. Click **Save**.

Create a Performance Template Section for Performance Goals

This example demonstrates how to create a Performance Goals section to rate performance goals in the performance document and use calculated ratings to determine the overall rating.

To create a performance template section for Performance Goals, follow these steps:

1. Go to **My Client Groups > Performance > Performance Template Sections**.
2. Click **Add** in the Performance Template Sections page.
3. Complete each section as described below.

Section Details

1. In the **Section Details** section, complete the fields as shown in this table.

Field	Value
Name	Performance Goals
Description	This section is used to rate performance goals and calculate section ratings as part of the overall ratings. The section weight section is 60 to complement the Competencies section.
From Date	01/01/2025
To Date	12/31/2025

Field	Value
Status	Active

- Click **Save**.

Section Processing

- In the **Section Processing** section, complete the fields as shown in this table.

Field	Value
Section Type	Performance Goals
Section Rating Model	Any
Rate Section	Select
Calculation Rule for Section	Average
Decimal Places	2
Decimal Rounding Rule	Standard
Mapping Metric	Numeric Rating
Mapping Method	Nearest
Enable section comments	Select
Weight section	Select
Section Weight	60

- Click **Save**.

Item Processing

1. In the **Item Processing** section, complete the fields as shown in this table. Use the default values except where indicated.

Field	Value
Enable items	Select
Rate items	Select
Rating Type	Performance
Use section rating model for performance rating	Select
Performance Rating Model	Any
Item Calculation	Performance
Enable item comments	Select
Target Performance Rating	Select
Minimum Weight	Select
Weight	Select
Required	Select

2. Click **Save**.

Section Content

1. In the **Section Content** section, complete the fields as shown in this table. Use the default values except where indicated.

Field	Value
Populate with Worker Performance Goals	Select

Field	Value
Allow update goals action to update goal weights from goal management business process	Select
Use specific content items	Select

2. In the **Content Items** section, click **Add**.
3. In the **Content Items** section, complete the fields, as shown in this table. Use the default values except where indicated.

Field	Value
Item Name	Any
Performance Rating Model	Any
Target Performance Rating	Any
Weight	Any
Minimum Weight	Any
Required	Select

4. Click **Save**.

13 Review Periods

Review Periods in Talent Management

Review periods are business periods that you use to measure performance and achieve results. Review periods enable you to organize your processes into time bound business cycles. For example, you can create a review period for the Financial Year 2020 as FY2020.

You can link Talent Management business objects that have the same review period time line. Review period is a common component that ties to goal plans and performance document periods. For example, you can connect an employee's performance to business objectives and results by associating goal plans in the Goals work area and performance documents in the Performance Management work area with business periods using review periods.

Manage Review Periods

As an HR specialist or administrator, you manage review periods on the Review Periods page.

- HR specialists can go to **My Client Groups > Goals**, and then select the **Review Periods** link.
- HR specialists can go to **My Client Groups > Performance**, and then select the **Review Periods** link.
- Administrators can search for and use the **Review Periods** task in the Setup and Maintenance area.

These considerations apply for review periods:

- You can create review periods whenever you want to, and later associate them with goal plans, goal plan sets (if enabled), and performance documents.
- Each review period must have a unique name.
- If a review period is in use, then you can't modify its start and end dates.
- You can set the status of a review period to active or inactive any time. The business objects already associated with a review period that you make inactive continue to use the review period. But HR specialists can't see an inactive review period when creating a business object, such as a goal plan, goal plan set, or performance document.
- You can hide inactive review periods in all employees and managers responsive pages. You need to set the **Display Inactive Review Periods** (ORA_HRT_DISPLAY_INACTIVE_REVIEW_PERIODS) profile option to **No**. But remember that HR specialists will continue to see inactive review periods regardless of the profile option value.
- You can also delete review periods that aren't in use.

Review Periods You See

You can now only see relevant review periods on the Goal Management and Performance Management responsive pages.

- On the employee **Goals** spotlight page, you can see only those review periods for which the employee has an assigned goal plan. But if primary goal plan is enabled, you can see all review periods.

- On the employee **Performance** Spotlight page, you can see only these review periods:
 - Review periods where the employee has a performance document created for them or an Anytime document can be created
 - Review periods where the employee has a check-in document created for them or a check-in document can be created
- On the **Performance** spotlight page, an employee can also see review periods where the employee has a received a request to provide participant feedback for another employee.
- On the Evaluate Performance page, managers can see review periods for which there are created employee performance documents (regular or Anytime) where the manager is the performance document manager.
- On the Goals and Performance Overview page, managers can see only these review periods:
 - Review periods where the employee has an assigned goal plan. But if primary goal plan is enabled, all review periods are shown.
 - Review periods where the employee has a performance document created for them or an Anytime Document can be created
 - Review periods where the employee has a check-in document created for them or a check-in document can be created

Link Goal Plans and Goal Plan Sets to Performance Documents

When you create performance templates, you select a review period for each document period.

When you create a goal plan, you select a review period and then associate performance document types with the goal plan. If goal plan set is enabled, when you create a goal plan set, you select a review period. All goal plans in the goal plan set have the same review period. The goal plan's review period and the associated performance document types determine the goals that appear in the goal plan when a performance document is created.

Associate Check-In Templates with Review Periods

You can associate a check-in template with specific performance review periods or all review periods. By default, check-in templates are associated with all review periods. When you create a check-in document based on the template, these goals for the review period are included in the check-in document:

- Performance goals that aren't pending approval, not private, and not canceled
- Active and not private development goals

You can add a discussion topic for a performance goal if you're assigned any goals for the review period.

Note: When you change the review periods associated with a check-in template, the already created check-in documents aren't affected.

Did you know that you can also specify review periods or change review periods for inactive check-in templates? The review periods can control the goals included in the check-in documents, when you later activate the template.

Related Topics

- [How Performance Documents Work with Performance Goals](#)
- [Guidelines for Setting Up Performance Document Periods](#)
- [Create a Check-In Template](#)
- [Goal Plans](#)
- [Goal Plan Sets](#)

14 Performance Document Types

Overview of Performance Document Types

You must create performance document types to associate with performance templates to create performance documents. You can use the document types to differentiate performance templates used to evaluate workers.

You can also use performance document types to determine:

- Which performance documents provide interim ratings in later performance documents
- Which goal plans the performance goals in a performance template belong to. Additionally, the Evaluation Type determines which section of the performance template the goal plan is mapped to.

Use the Performance Document Types task in the Setup and Maintenance work area.

Attributes

Along with the name and optional description, you configure the following attributes:

- **From Date** and **To Date**: For the document type to be valid in the template, the following must be true:
 - The from date must be the same as or before the performance template from date
 - The to date must be the same as or later than the performance template to date
- **Status**: Set the status to **Active** to make it available for performance templates and performance goals plans. Once it's used by a template or goal plan, you can't set it to **Inactive**.

About Performance Templates

You must select a performance document type to include in every performance template. You select the document type on the General tab of the performance template.

In addition, if you configure the performance template to use interim evaluations, you must select at least one document type to associate with the document period. The document types and review periods you select on the Document Periods tab determine which interim ratings and comments appear in the later performance document. The ratings, comments, or both (depending on configuration) from performance documents associated with those document types appear in the document.

You can use the same document types, or create unique ones for the interim and final performance documents.

About Goal Plans

To make a goal plan available to use in performance documents, when creating the goal plan you must select the document types to associate with the goal plan. The document type, in conjunction with the selected review period determines which goal plans are added to the performance document.

When a worker or manager adds a performance goal to Performance Document D, the goals are automatically added to Goal Plan A.

Related Topics

- [Interim Evaluations in Performance Documents](#)
- [Goal Plans](#)

15 Performance Templates

Guidelines for Setting Up Performance Templates

Define performance templates to create the performance documents that managers, workers, and participants use to evaluate workers' performance for a given time period or project. The performance template combines the process flow definition, the section definitions, and the document type.

The performance template can also contain content, such as competencies and goals. When creating a performance template, you can select either of the these types:

- Standard, for typical performance documents, such as annual or project or company-wide evaluations.
- Anytime, for performance documents that managers and workers can create any time to evaluate the worker.

When creating the performance template, the HR specialist must determine:

- Document types and eligibility profiles
- Participation roles
- Process flow
- Calculation rules, processing options, and participant options
- Structure
- Content
- Document periods

To create performance templates, use the **Performance Templates** task. Go to **My Client Groups > Performance > Performance Templates**. You can create a new template by clicking **Add** or you can search for an existing template.

Document Types and Eligibility Profiles

Select or create a document type to identify the type of evaluation that the performance template supports, such as annual evaluation, which would use the Standard template or Anytime for an anytime performance document. The document type included in the performance template is also used to identify which employee's goal plans should populate the goal sections in the performance document.

Associate eligibility profiles to the overall template, or to the document periods, to restrict the performance documents made from the template to those who meet the criteria. You can limit access to the document by requiring a certain eligibility profile; you can also include non-required profiles. Workers must meet the criteria for all required conditions. They must also meet the conditions for at least one of the non-required criteria.

Participation Roles

Specify the roles that are eligible to access the performance document. You can select **Manager**, **Worker**, or any participant roles created in the **Performance Roles** task. On the **Structure** tab, you select which roles can access the individual section in the performance document to provide ratings and comments, questionnaire feedback, and perform other actions. For example, if you set up the performance template so that only managers rate workers, but workers can see the results, then you must select both roles as participants. If, however, the manager rates workers without the workers participating in the performance evaluation process or viewing results, then you can select only the manager role.

In the **Participation** section, you also set the minimum number of participants required for participant feedback, and the minimum for each role. These settings aren't enforced but serve as a guideline for managers and workers when they request participant feedback.

Process Flow

The process flow determines which tasks are included in the performance template. You can select a previously-defined process flow or create one as you create the template.

The process flow also determines which sections you can add to the performance template. If the performance template is used to rate workers, set goals, and let workers and managers provide final feedback, the process flow you select must include all those tasks. You can only add sections to the performance template that are required by the process flow. For example, if the process flow doesn't include the **Worker Final Feedback** task, you can't add that section to the performance template.

You can enter the number of days before the tasks are due that an email alert is sent for both standard and critical alerts. You enter the task due dates on the **Document Periods** tab. Alerts aren't available for Anytime performance templates.

Calculation Rules, Processing Options, and Participant Options

In the **Process** tab, you can select whether to calculate ratings and display the calculated ratings for performance template sections. The sections included in the performance template must be set up to use calculated ratings to use this feature.

Use **Processing Options** to select these features:

- Designate whether managers, workers, and participants can select star ratings to rate items and sections. For star ratings, the number of stars correspond to the rating descriptions set for each star. For example, one star may represent the Foundation rating description, two stars may represent the Intermediate rating description, and so on. Star ratings can be used only for rating models that use 10 or fewer rating levels. If you specify not to use star ratings, managers, workers, and participants select the rating descriptions from a choice list. The rating description displays no numeric rating, but the description corresponds to a rating number set up for the rating model. The number that corresponds to the rating description selected by the worker or manager is used to calculate ratings.
- Include digital signature to require workers to verify that they're the people submitting the performance document as part of the **Worker Final Feedback** task.
- Display feedback notes on the performance document to use them as a guide to rate workers while the evaluation is in progress. Feedback can only be viewed by those roles configured to view it. The feedback notes aren't included in the printed performance document.

Participant options let you determine whether participant feedback is required for the performance document, which isn't enforced but serves as a guideline for managers and workers. You also specify these options:

- Whether to let workers view participants selected by the manager to provide feedback. When you choose this option, it overrides other role options that you have set to allow workers to see participant feedback names or roles, for example, in the **Processing by Role** section of the **Structure** tab.
- Whether to auto-populate matrix managers of a worker as participants to avoid manually adding them as participants.
- The default participant role assigned to matrix managers.
- Whether matrix managers can access worker documents automatically after they're created.

Structure

Add previously-defined sections or create ones that are required for the process flow selected for the template. You must select or create one of each type of the sections that are required for this particular template. You can edit previously-defined sections to suit the template requirements, including processing options, properties and content.

For each section, you must select which roles have access to the section in the performance document to view and if applicable, provide ratings, comments, and questionnaire feedback.

You can choose which roles can provide item ratings and item comments for these sections in performance documents:

- Performance Goals
- Development Goals
- Profile Content

You can choose which roles can provide section ratings and section comments for these sections in performance documents:

- Performance Goals
- Development Goals
- Profile Content
- Overall Summary
- Worker Final Feedback (section comments only)
- Manager Final Feedback (section comments only)

Note: If the performance template is in use, then it's possible to exclude a role from providing ratings or comments. If a role previously provided item ratings or comments, and you then excluded the role from providing them, the application retains the previous ratings and comments but doesn't display them in the performance document.

Content

For each section that contains content that can be rated, you can add content items directly to the performance template so they appear on the performance document. For both **Goals** and **Profile Content** sections you can load content that was included in the previously-defined section. For a Profile Content section, such as competencies, you can also copy content from whatever profile the section uses as a source for content items. You must set up profiles to be used as a source in this case.

This lets you target this performance template as broadly or narrowly as you need. You can decide to load content items from the section, for example, that apply to everyone who's rated using the performance document created from this template. But you may decide not to copy content directly from a profile in the template because the population being evaluated has varied profiles. The workers and managers can then copy profile content on the performance document itself (if the process flow is set up to let them).

Document Periods

You can create a single, or multiple document periods, within a performance template. Adding multiple periods enables you to create performance documents from the same template for different periods. The performance documents are treated as distinct documents, but contain the same process flows, sections, and processing rules. For example, you can create a template for an annual evaluation to use every year. If you create multiple periods (each period is used to create a performance document), then the content of those performance documents may change as the content is coming

from other sources: competencies from profiles in profile management, the employee's goals in goal management, or development goals in career development.

The person who creates the performance document can change the performance document's start and end dates, if desired. However, the performance document start and end dates must be between the document period's start and end dates.

Configure these options for the selected period:

- **Name:** The name of the document period is the name of the performance document created for the period.
- **Review Period:** Select the review period for the document.
- **Performance Document Start and End Dates:** These must be the same as, or within, the review period start and end dates.
- **Short Name:** Used for reporting.
- **Available to Use:** Select for anytime documents so they're available to managers and employees to create them.
- **Lock Manager Share Task:** Select this to prevent managers from sharing the ratings with employees during the calibration period. This option is available only if the **Allow document sharing task to be locked for calibration** option is enabled in the Process Flow page.

On the document periods you add, you can also set up these items:

- **Eligibility profiles:** Add additional eligibility profiles or remove the ones inherited from the **General** tab, and select whether they're required.
- **Document types for interim and anytime evaluations:** Add document types used in other performance templates that you want to appear in the performance document for the selected period.
- **Due Dates:** Within each period, you can set the due date for each task that's included in the process flow used by the performance template. Due dates aren't available for Anytime performance templates.
- **Questionnaires:** Add roles and associate them with questionnaires to give the role access to the appropriate questions on which to provide feedback in the performance document.

Related Topics

- [Considerations for Using Performance Template Section Calculation Rules](#)
- [Create a Performance Template Section for Profile Content](#)

Guidelines for Defining Processing Roles for Performance Template Sections

Add roles to performance template sections and define processing settings for each role so managers, workers, and participants can access the sections to rate workers and provide feedback.

You must decide:

- Which roles to add to each section
- Whether ratings and comments for items and sections are required
- Whether to share ratings and comments with workers

- Whether to update worker profiles with ratings and content items
- Which roles can access questionnaires and feedback

You add roles to sections on the Content tab of the Create and Edit Performance Template pages. You can find those pages using the Performance Templates task in the Setup and Maintenance work area.

Adding Roles to Sections

You must add all the roles that require access to the section, whether to provide ratings or feedback, or view the section. For example, if your organization requires only managers to rate goals, but workers can only view the goals and ratings, you must add both the manager and worker roles to that section.

If the section type is used by a specific role to provide ratings or feedback, you must still add that role. For example, workers provide feedback on the Worker Final Feedback section type. However, you must add the worker role to the Worker Final Feedback section so the worker can access it. For the manager to be able to view worker comments on the Worker Final Feedback section, you must also add the manager role.

The roles that are available to add to the section are those you added in the **Participation** section of the **General** tab of the performance template.

Requiring Ratings and Comments

You can configure the section so ratings and comments are either required, or optional, for both items and the section. The available options are:

- **Optional with warning message:** Warning message when no ratings or comments are provided. This is the default value for all ratings and comments.
- **Optional with no warning message:** No message because ratings and comments are optional.
- **Required:** Error message when roles that are required to provide ratings or comments don't provide them.
- **Not Allowed:** The role can't provide ratings and comments.

You can set up the section so one role is required to provide ratings and comments, but for other roles, they're optional.

To enable item ratings and comments, select the following check boxes in the Item Processing section:

- **Enable ratings for items**
- **Enable item comments**

To allow roles to provide section ratings and comments to be used, select the following check boxes in the Section Processing section:

- **Enable manual section rating**
- **Enable section comments**

Sharing Ratings and Comments with Workers

After adding the role, specify whether to share with workers the ratings or comments that managers or participants provided in the Profile Content, Goals, or Overall Summary sections. You can configure different settings for each participant role, so workers can see participant ratings and comments for one role, but not another. In the Manager Final Feedback and Worker Final Feedback sections, specify whether workers can view the manager comments. Ratings and comments provided by workers and participants are always visible to all managers who have access to the performance documents. Participants can't view manager or worker ratings and comments.

Updating Worker Profiles with Ratings and Content Items

For the Profile Content section type, specify whether to update the worker profile with the ratings provided by the manager and any content items that were added to the performance document that aren't in the worker profile.

For the Overall Summary section, specify whether to update and display the overall performance rating provided by the manager. When you select the option, the rating appears in the employee's Talent Profile.

If you elect to update profiles for competency sections, you can also specify the instance qualifier to identify that the source of the proficiency level provided by the manager for competencies is the performance document. Instance qualifiers must be set up and maintained in Oracle Fusion Profile Management to use this feature.

Accessing Questionnaires and Feedback

When the Participant Feedback task is included in the process flow used by the template, you specify which roles can see the participant questionnaires. You specify whether:

- Line managers and matrix managers can see questionnaires and feedback provided by workers and participants, including the participant names.
- Workers can see questionnaires and feedback provided by the manager and participants, including the participant names.
- Line managers, matrix managers, and workers can see the participant names and their roles.

When you use questionnaires for participant feedback and configure the template so that workers can't view participant feedback, you can set the **Participant Role Can Enter Comments Visible to Worker** setting to **Yes** for a participant role. Participants with that role can then add overall comments to the questionnaire that are visible to both the manager and worker. The worker can't view the name of the participants. This option is only available if participants aren't given access to the Overall Summary section where they can provide overall comments.

Related Topics

- [Options for Configuring Performance Documents to Display Performance Ratings to Employees](#)
- [Instance Qualifier Sets](#)

Performance Document Task Alert Notifications

You can set up performance documents to alert workers and managers before a task is due. In the performance template, you can set up one-time, or repeat notifications, for standard and critical alerts.

Use the Manage Performance Templates task in the Setup and Maintenance work area. Go to **My Client Groups > Performance > Setup Maintenance > Performance Templates**.

If you set up the standard and critical alerts, notifications are sent for all performance documents created from the template. The notifications are sent when the task is available to begin. For example, the task must be the first in a created performance document, or the previous task must be completed.

Standard and Critical Alert Days

Enter the number of days before a performance document task is due to send standard or critical alerts to remind workers and managers of the deadline. The notification is sent once for each alert. You enter the number of days before

the due date on the Process tab of the performance template. Enter the due date for each task on the Document Periods tab of the performance template.

You can enter either, or both, standard and critical alert days. The number of standard alert days must be greater than the number of the critical alert days as standard alerts are sent before critical alerts.

If you edit the task due dates for performance documents for specific workers using the Change Due Dates administrative task, the settings in the template aren't affected. The notifications are sent the specified number of days before the task due date.

Repeat Standard and Critical Alerts

In the performance template, you can also select the options to send repeat standard and critical alerts until the task is completed. Select the **Repeat Standard Alert Until Task Completes** and **Repeat Critical Alert Until Task Completes** options that appear on the Process tab of the performance template.

To send notifications for a task deadline, you must run an Oracle Enterprise Scheduler Service process. To launch this process, use the **Navigator > Scheduled Processes > Schedule New Process** button in the search results table. Use the Send Performance Document Alert Notifications job to send the notifications, and set the schedule as appropriate for your business processes. It is recommended that you set the process to send notifications daily. If you select the options to send both standard and critical alerts, workers and managers receive notifications according to the following schedule:

- Standard notifications are sent according to the process job schedule, such as daily, or weekly, starting from the specified standard alert days before the task is due.
- Critical alerts are sent starting from the specified critical alert days, adhering to the process job schedule until the task is completed.

For example, assume that you set the standard alert to be sent 14 days before a task is due, and the critical alert to be sent 7 days before the task due date. In addition, you set the process schedule to send notifications daily. If you enable the repeat alerts for both the standard and critical alerts, the standard alert is sent every day between 14 and 7 days before the task due date. Then, the critical alert is sent daily for the 7 days before the task due date and continues until the task is completed. If you set only one or the other of the standard or critical alert days to repeat, the notifications are sent starting from the number of the days before the task is due until the task is completed, according to the process job schedule.

The notifications cease when the task is completed for the respective role or the performance document is completed. For example, when the worker submits a completed task, the worker no longer receives notifications. However, for tasks that aren't completed, you must turn off the notifications to prevent them from continuing even after the task is due. To turn off the notifications, you must either:

- Deselect the options in the performance template and save the template.
- Turn off the Enterprise Scheduler Service process.

Interim Evaluations in Performance Documents

You configure performance templates and document periods to display the ratings and comments from interim evaluations in subsequent performance documents. This topic explains what interim ratings are and use cases for them, how you configure them, and how to display them.

Use Cases for Interim Evaluations

You can use interim documents to view ratings and comments from previous performance documents in later, or final performance documents in an evaluation period. For example, you can configure interim and later performance documents to capture and display ratings and comments for:

- Midyear or quarterly evaluations
- Project evaluations
- Previous annual evaluations

You can configure interim documents to capture the same, more, or less information than, for example, an annual evaluation. For example, you can configure the interim evaluation to require comments, but not ratings, for content items and sections. Or, for simplicity, the interim evaluation may not contain tasks for participant feedback or approvals.

Available Ratings and Comments

The ratings and comments you configure to appear in each performance document are those that appear in the later documents. You can configure ratings, comments, or both to appear for the Overall Summary, Profile Content (competencies) and Goals sections, and ratings only for content items.

If you configure some ratings or comments to appear in the interim, but not the later performance document, the later document doesn't display the ratings or comments from the interim document. For example, if you include section ratings in the performance template for the interim evaluation, but not in the final evaluation template, the section ratings don't appear in the final performance document.

About Configuring Interim Evaluations

Interim evaluations appear in subsequent documents based on configuration of:

- Review periods
- Document types
- Document periods on the performance template

Review periods must be the same for both the interim and later documents that consume the interim documents.

To make interim evaluations appear in later, or final performance documents, you must select at least one document type to associate with the document period for the final document. The document types you select on the Document Periods tab determine which interim ratings and comments appear in the final performance document. The ratings, comments, or both (depending on configuration) from performance documents associated with those document types appear in the document.

Document types associated with the performance templates used for the performance documents can be the same, or different for the interim and later documents, depending on your needs. The document types must be the same for all interim evaluations that you want to appear cumulatively. For example, if your organization uses quarterly evaluations, to see the ratings for all previous quarters in subsequent quarters, each must use the same document type. If you want to isolate interim performance documents from each other, but have them appear in a final document, the interim performance documents must use different document types. You might use this approach, for example, if you have both midyear and project evaluations and need neither to be visible to the other, but both to appear in an annual evaluation.

In the document period of the performance templates you use to create the performance documents you select the review period. In the document period for each later document in which you want interim documents to appear, you also must select the document types for the interim evaluations you want to appear. If you have only one document

type, such as for cumulative quarterly evaluations, select the document type those documents use. If you have multiple evaluations to display, such as for the midyear and project evaluations mentioned previously, select all document types that apply.

Access to Interim Ratings

Interim ratings and comments appear in the final document in this way:

- Section and Overall Summary ratings appear on the dialog box that appears when you click the **Information** icon for the section.
- Content items appear on the dialog box that appears when you click the **Information** icon for the same content items, and using the **Interim** link on the content item detail dialog box.

For individual content items, you can view ratings and comments from interim evaluations only for each matching content item. For example, if you have a competency in Period 1, and the same competency in Period 2, you can select the Information icon in Period 2 performance document to see the Period 1 information. If that competency isn't part of the template or configured to appear as part of a profile in Period 2, it doesn't appear.

In the dialog box that appears, you can click the performance document name to open a PDF of the interim performance document to see the entire interim performance document.

Guidelines for Setting Up Performance Document Periods

You configure document periods on a performance template from which to create performance documents. Performance documents are created from the document period and the configured attributes, such as the review period, document types, and associated questionnaires.

You can also associate eligibility profiles to determine which workers can access the documents. This topic describes the configuration options for document periods. You configure performance templates using the Performance Templates task.

Document Periods

You can add a single, or multiple periods, within a performance template. Adding multiple periods enables you to create performance documents from the same template for different periods. This lets you create performance documents that are treated as distinct documents, but contain the same process flows, sections, and processing rules.

Name

The name of the document period is the name of the performance document created for the period.

Review Period

You must select a review period for the document period. The review period typically corresponds to the talent business period, such as a calendar or fiscal year, or semiannual period. You can select different review periods for different document periods. The review period also helps determine which goal plans any goals added to the performance

document are added to. The goals in the performance document are added to goal plans that are associated with both the:

- Review period selected for the document period
- Document type selected for the template

Goal plans are available only when Oracle Fusion Goal Management is enabled.

Performance Document Start and End Dates

The performance document start and end dates must be the same as, or within, the review period start and end dates. The dates for periods can overlap, but can't be identical for the same template.

Short Name

The short name appears in the rating history analytic for each of the three years that appear, rather than the complete performance document name.

Available to Use

Available to Use is the default setting, and enables managers and workers to create documents for the period.

When you deselect **Available to Use**:

- Managers and workers can't create the document.
- Human resource (HR) specialists can still search and select the document using the Create Performance Documents or Monitor Missing Performance Document tasks.

You can deselect the **Available to Use** option to prevent access, for example, if you have created future periods, but don't want to make them available yet. Documents that are already created aren't affected by the **Available to Use** selection.

Lock Manager Share Task

Select this option if you don't want managers to share their ratings and comments during the calibration period. The managers won't have the option to share the performance document when this option is enabled and they see a banner informing them that they can't share the performance document just yet because it's locked for calibration. This feature only applies to performance documents that use this document period.

Note: This option is visible only if the **Allow document sharing task to be locked for calibration** option is enabled in the Process Flow page in the Setup and Maintenance work area.

Eligibility Profiles

Add eligibility profiles to the period to associate the profiles with the performance documents to restrict access to the documents made from the templates. Only workers who meet the eligibility criteria can have the performance documents created for them or access them. Managers can still access the performance documents even if they're not eligible for them. You can add different eligibility profiles to each period. Eligibility profiles added to the General tab appear automatically on the Document Periods tab.

You can remove or select or deselect Required as needed for your business process. If you select eligibility profiles for a document period, the application assigns performance documents as follows:

- If all eligibility profiles are marked as required, then an individual must meet criteria of all the eligibility profiles.
- If no eligibility profile is marked as required, then an individual must meet criteria of at least one eligibility profile.
- If some eligibility profiles are marked as required and some aren't, then an individual must meet criteria of all the required profiles and at least one nonrequired profile.
- If only one eligibility profile is marked as required, then an individual must meet criteria of that eligibility profile.

Document Types for Interim and Anytime Evaluations

If you use interim evaluations, such as quarterly or anytime evaluations, as part of your review process, you must configure the document period that consumes these evaluations. The ratings and comments in the interim documents appear in the later performance document. Using the combination of the document type and review period used in the interim and final performance documents, the application determines which interim documents are included in the final document.

Interim evaluation ratings and comments appear in the final performance document when:

- You add the document type for the interim evaluations to the document period of the later, or final, evaluation. You can add document types for each interim evaluation you want to appear in the final evaluation.
- The review periods of the interim evaluations and the final evaluation are the same.
- The performance documents from the interim evaluations are completed.

Due Dates

Within each period, you can set the due date for each task that's included in the process flow used by the performance template. The due date for each task must be the same or later than the task before, with the exception of the Participant Feedback task. The due date for the Participant Feedback task must be the same or earlier than the Manager Evaluation of Workers task due date.

The due dates are guidelines and don't prevent performance documents from being created or tasks from being completed.

Questionnaires

When using participant feedback, you specify for a period which questionnaire to associate with each participant role, including the manager and worker roles. The role then has access to the appropriate questions on which to provide feedback in the performance document.

Related Topics

- [How Performance Documents Work with Questionnaires](#)

Guidelines for Associating Eligibility Profiles with Performance Templates

Add eligibility profiles to a performance template to associate the profiles with the performance documents created from the template. This lets you restrict access to the performance documents.

When associating eligibility profiles to performance templates, you need to make these decisions:

- Do I need to use eligibility profiles?
- Should I add eligibility profiles at the template-level or period-level?
- Should I mark eligibility profiles as required?
- Can I add or remove eligibility profiles when the template is in use?

To manage performance templates, use the **Performance Templates** task. Search for and select this task in the Setup and Maintenance work area or go to **My Client Groups > Performance**.

Use Eligibility Profiles

Add eligibility profiles to performance templates to target performance documents to a specific population of employees. This enables you to create multiple performance documents that are appropriate for specific review purposes. For example, you can add an eligibility profile to performance documents that are appropriate for the Sales team, and another for the Information Technology department.

Add Eligibility Profiles to the Template General Tab and the Document Periods

You can add existing eligibility profiles to either, or both, the performance template on the General tab and the document periods on the Document Periods tab. You can add as many profiles as required to either the General tab or document periods.

Eligibility profiles you add to the General tab are inherited by the document periods when periods are added to the template. You can add, remove, or change the eligibility profiles for the document periods, and change the required status as well. The eligibility profiles associated with a document period are used to determine eligibility for documents created for that period.

Mark Eligibility Profiles as Required

You can specify whether or not an eligibility profile is required.

If eligibility profiles are required for the document period, employees must satisfy all required profiles and at least one that isn't required, if any are added, to be eligible for the performance document.

When you add only eligibility profiles that aren't required to the document period, employees must satisfy the criteria for at least one of them to be eligible for the performance document.

Add or Remove Eligibility Profiles when the Template is in Use

You can add or remove eligibility profiles from a template or document period even if the template or period is in use. But remember that when you add an eligibility profile to a template, any previously-existing periods don't inherit the new eligibility profile.

Related Topics

- [How You Use Eligibility Profiles with Performance Documents](#)

How You Specify the Number of Participants for a Performance Document

You can specify the total minimum and maximum number of participants that employees and line managers can select to provide feedback for a performance document in the Participation section when configuring a performance template.

You can also specify the minimum and maximum number of participants with other roles such as peer or colleague.

You can enforce these numbers, if you want to. This means employees and managers can't complete their evaluations until the minimum number of participants provide feedback and can't exceed the maximum number they request provide feedback from.

If you set the total minimum or maximum number of participants, you also need to select a participant role. When you specify the total maximum number of participants, ensure that you follow these guidelines:

- The maximum number of participants allowed per role isn't more than the number in **How many participants allowed in total**.
- The minimum number of participants isn't less than the number in **How many participants required in total**.

Create a Performance Template

This example demonstrates how to create a performance template that's used to create performance documents containing most tasks in a process flow, and rate workers. You manage performance templates using the Performance Templates task in the Setup and Maintenance work area.

The following table summarizes key decisions for this scenario.

Decisions to Consider	In This Example
What type of performance template is this?	Standard, for an annual performance evaluation
Add eligibility profiles to either the template or performance document periods, and are they required?	Yes, add the same eligibility profile to both the template and the performance document periods, and specify it as required; add an additional eligibility profile to one period, and don't specify it as required

Decisions to Consider	In This Example
Calculate section ratings and the overall rating? Who can see calculated ratings?	Yes, the worker, manager, participants, and matrix managers can see calculated ratings
Which section rating model to use?	Any
Weight the sections?	Yes, give the Profile Content section a weight of 40, and the Performance Goals section a weight of 60
Enable content items for the section? Include content added to the performance template in the sections?	Yes, enable content items for the Profile Content and Performance Goals sections; add a content item to each section in the template
Is participant feedback required, and is there a minimum requirement for participants?	Yes, feedback is required with a minimum number of participants; participants should provide ratings and comments on the Profile Content, Performance Goals, and Overall Summary sections, and a Questionnaire section is added to the template to capture additional participant feedback
Enable options to automatically populate matrix managers as participants? Automatically grant access to performance documents for matrix managers?	Yes
Enable which roles to provide feedback?	Manager, worker, colleague
Should managers share ratings with workers?	Yes, managers share their ratings with workers
Use ratings to update the worker profile?	Yes, use manager ratings to update the worker profile
Use the performance template for more than one period?	Yes, set up two performance document periods
Use interim evaluations?	Yes, use the first performance period as an interim evaluation in the second period
Which review periods do I select for the periods?	FY2017

Summary of the Tasks

Create a performance template.

1. Enter general information.
2. Enter process details.
3. Enter structure details.
4. Load and add content to the Profile Content and Performance Goals sections.
5. Add two document periods, one for each half of an annual evaluation.
6. Review template settings.

Prerequisites

1. Create a document type that can be used for an annual evaluation.
2. Create a performance role for Colleague and one for Matrix Manager. Configure the Matrix Manager role to enable viewing worker and manager evaluations.
3. Create a process flow with the following tasks and subtasks, in the following order: Set Goals, Worker Self-Evaluation, Manager Evaluation of Workers, Participant Feedback, First Approval, Share Documents, Worker Must Acknowledge Document, Conduct Review Meetings, Worker Must Acknowledge Review Meetings, Worker Final Feedback, Manager Final Feedback.
4. Create the following sections: Profile Content, Performance Goals, Questionnaire, Overall Summary, Worker Final Feedback, Manager Final Feedback.
5. Create the review period named FY2017.

Enter General Information

1. In the Setup and Maintenance work area, on the Workforce Development task list page, in the Task panel, click Search.
2. On the Search page, click **Performance Templates** to open the Performance Templates page.
3. Click Add.
4. On the Create Performance Template page, in the General section, complete the fields, as shown in this table.

Field	Value
Template Type	Standard
Name	Annual Performance Evaluation
Comments	This template is used for an annual performance evaluation.
From Date	01/1/17
To Date	12/31/21
Status	Active
Document Type	Any that can be used for an annual evaluation

5. In the Eligibility Profile section, click **Add**.
6. In the Eligibility Profile section, complete the fields as shown in this table.

Field	Value
Eligibility Profile	Any

Field	Value
Required	Select

7. In the Participation section, click **Add**.
8. Select **Manager**.
9. In the Participation section, click **Add**.
10. Select **Worker**.
11. In the Participation section, click **Add**.
12. Select **Colleague**.
13. In the Participation section, click **Add**.
14. Select **Matrix Manager**.
15. In the Participation section, complete the fields as shown in this table.

Field	Value
Set the minimum number for each role check box	Select
Total minimum number of participants required in the document	2

16. In the **Colleague** and **Matrix Manager** rows, in the **Minimum Number of Participants Required Per Role** column, enter 1.
17. Click **Save**.

Enter Process Details

1. On the **Process** tab, complete the fields, as shown in this table. Use the default values except where indicated.

Field	Value
Process Flow	The process flow you created as a prerequisite for this task.
Calculate ratings	Select
Display star ratings	Select
Include digital signature	Select
Display feedback notes	Select

Field	Value
Display requested feedback	Select
Participant feedback is required	Select
Worker can view participants added by manager	Select
Auto-populate matrix managers of the worker as participants	Select
Default participant role	Matrix Manager
Allow matrix managers to access worker document automatically	Select

2. Click **Save**.

Enter Structure Details

Add an available section of each type to the performance template, edit the existing settings for the sections, and add the manager and worker roles to each section.

1. Enter structure details for the Profile Content section.
2. Enter structure details for the Performance Goals section.
3. Enter structure details for the Questionnaire section.
4. Enter structure details for the Overall Summary section.
5. Enter structure details for the Final Feedback sections.

1. Enter structure details for the Profile Content section

1. On the Structure tab, in the Sections section, click **Add**.
2. In the Section Name section, select the name of the Profile Content section that you created as a prerequisite for this task.
3. In the Section Processing section, complete the fields as shown in this table. Use the default values except where indicated.

Field	Value
Section Type	Profile Content
Section Rating Model	Any

Field	Value
Rate Section	Select
Enable manual section rating	Select
Calculation Rule for Section	Average
Decimal Places	2
Decimal Rounding Rule	Standard
Mapping Metric	Numeric Rating
Mapping Method	Nearest
Enable section comments	Select
Enable section weights	Select
Section Weight	40
Section Minimum Weight	10

4. In the Item Processing section, complete the fields as shown in this table. Use the default values except where indicated.

Field	Value
Enable items	Select
Enable ratings for items	Select
Rating Type	Proficiency
Use section rating model for performance rating	Select

Field	Value
Performance Rating Model	Any
Item Calculation	Any
Enable item comments	Select
Target Performance Rating	Select
Weight	Select
Required	Select
Target Proficiency Level	Select

5. In the Processing by Role section, click **Add**.
6. In the Processing by Role section, complete the fields as shown in this table.

Field	Value
Role	Manager
Item Ratings	Optional With Warning
Item Comments	Optional With Warning
Section Ratings	Optional With Warning
Section Comments	Optional With Warning
Share Ratings	Yes
Share Comments	Yes
Update Profile	Yes
Instance Qualifier	Supervisor

Field	Value
View Participant Names	Yes
View Participant Roles	Yes

7. In the Processing by Role section, click **Add**.
8. In the Processing by Role section, complete the fields as shown in this table. Use the default values except where indicated.

Field	Value
Role	Worker

9. Repeat steps 7 and 8, substituting Colleague and Matrix Manager for Worker.
10. Click **Save**.

2. Enter structure details for the Performance Goals section

1. On the Structure tab, in the Sections section, click **Add**.
2. In the Section Name section, select the name of the Performance Goals section that you created as a prerequisite for this task.
3. In the Section Processing section, complete the fields as shown in this table. Use the default values except where indicated.

Field	Value
Section Type	Performance Goals
Section Rating Model	Any
Rate Section	Select
Calculation Rule for Section	Average
Decimal Places	2
Decimal Rounding Rule	Standard
Mapping Metric	Numeric Rating

Field	Value
Mapping Method	Nearest
Enable section comments	Select
Weight section	Select
Section Weight	60

4. In the Item Processing section, complete the fields as shown in this table. Use the default values except where indicated.

Field	Value
Enable items	Select
Rate items	Select
Rating Type	Performance
Use section rating model for performance rating	Select
Performance Rating Model	Any
Item Calculation	Performance
Enable item comments	Select
Target Performance Rating	Select
Minimum Weight	Select
Weight	Select
Required	Select

5. In the Processing by Role section, click **Add**.
6. In the Processing by Role section, complete the fields as shown in this table.

Field	Value
Role	Manager
Share Ratings	Yes
Share Comments	Yes
Update Profile	Yes

7. In the Processing by Role section, click **Add**.
8. In the Processing by Role section, complete the fields as shown in this table. Use the default values except where indicated.

Field	Value
Role	Worker

9. Repeat steps 7 and 8, substituting Colleague and Matrix Manager for Worker.
10. Click **Save**.

3. Enter structure details for the Questionnaire section

1. On the Structure tab, in the Sections section, click **Add**.
2. In the Section Name section, select the name of the Questionnaire section that you created as a prerequisite for this task.
3. In the Section Processing section, select Questionnaire as the section type.
4. In the Processing by Role section, click **Add**.
5. In the Processing by Role section, complete the fields as shown in this table.

Field	Value
Role	Manager
Manager Questionnaire Can Be Viewed by the Role	Yes
Worker Questionnaire Can Be Viewed by the Role	Yes

Field	Value
Participant Questionnaire Can Be Viewed by the Role	Yes
Participant Name Can Be Viewed by the Role	Yes
Participant Role Can be Viewed by the Role	Yes

6. In the Processing by Role section, click **Add**.
7. In the Processing by Role section, complete the fields as shown in this table. Use the default values except where indicated.

Field	Value
Role	Worker
Manager Questionnaire Can Be Viewed by the Role	No
Worker Questionnaire Can Be Viewed by the Role	Yes
Participant Questionnaire Can Be Viewed by the Role	No
Participant Name Can Be Viewed by the Role	No
Participant Role Can be Viewed by the Role	Yes

8. In the Processing by Role section, click **Add**.
9. In the Processing by Role section, complete the fields as shown in this table. Use the default values except where indicated.

Field	Value
Role	Colleague

Field	Value
Participant Role Can Enter Comments Visible to Worker	No

10. Repeat step 9, substituting Matrix Manager for Colleague.
11. Click **Save**.

4. Enter structure details for the Overall Summary section

1. On the Structure tab, in the Sections section, click **Add**.
2. In the Section Name section, select the name of the Overall Summary section that you created as a prerequisite for this task.
3. In the Section Processing section, complete the fields as shown in this table. Use the default values except where indicated.

Field	Value
Section Type	Overall Summary
Rate Section	Select
Calculation Rule for Section	Average
Section Rating Model	Any

4. In the Processing by Role section, click **Add**.
5. In the Processing by Role section, complete the fields as shown in this table.

Field	Value
Role	Manager
Share Ratings	Yes
Share Comments	Yes
Update Profile	Yes

6. In the Processing by Role section, click **Add**.
7. In the Processing by Role section, complete the fields as shown in this table. Use the default values except where indicated.

Field	Value
Role	Worker

8. Repeat steps 6 and 7, substituting Colleague and Matrix Manager for Worker.
9. Click **Save**.

5. Enter structure details for the Final Feedback sections

1. On the Structure tab, in the Sections section, click **Add**.
2. In the Section Name section, select the name of the Worker Final Feedback section that you created as a prerequisite for this task.
3. In the Section Processing section, complete the fields as shown in this table. Use the default values except where indicated.

Field	Value
Section Type	Worker Final Feedback

4. In the Processing by Role section, click **Add**.
5. In the Processing by Role section, complete the fields as shown in this table.

Field	Value
Role	Manager
Share Comments	Yes

6. In the Processing by Role section, click **Add**.
7. In the Processing by Role section, complete the fields as shown in this table. Use the default values except where indicated.

Field	Value
Role	Worker

8. In the Section Name section, select the name of the Manager Final Feedback section that you created as a prerequisite for this task.

9. In the Section Processing section, complete the fields as shown in this table.

Field	Value
Section Type	Manager Final Feedback

10. In the Processing by Role section, click **Add**.
11. In the Processing by Role section, complete the fields as shown in this table.

Field	Value
Role	Manager

12. In the Processing by Role section, click **Add**.
13. In the Processing by Role section, complete the fields as shown in this table.

Field	Value
Role	Worker

14. Click **Save**.

Load and Add Content to Sections

1. On the Content tab, complete the fields as shown in this table.

Field	Value
Section Name	The name of the Profile Content section you created as a prerequisite for this task.

2. In the Section Items section, click **Load Items from Section**.
3. In the Section Items section, click **Add**, then complete the fields as shown in this table.

Field	Value
Item Name	Any

4. In the Details section, complete the fields as shown in this table. Use the default values except where indicated.

Field	Value
Target Proficiency Level	Any

Field	Value
Performance Rating Model	Any
Required	Select

5. On the Content tab, complete the fields as shown in this table.

Field	Value
Section Name	The name of the Performance Goals section you created as a prerequisite for this task

6. In the Section Items section, click **Load Items from Section**.
7. In the Section Items section, click **Add**, then complete the fields as shown in this table.

Field	Value
Item Name	Any

8. In the Details section, complete the fields as shown in this table. Use the default values except where indicated.

Field	Value
Performance Rating Model	Any
Target Performance Rating	Any
Required	Select

9. Click **Save**.

Add Document Periods

1. On the Document Periods tab, in the Document Periods section, click **Add**.
2. In the Document Periods section, complete the fields as shown in this table.

Field	Value
Name	2017 Performance Evaluation First Half

Field	Value
Review Period	FY2017
From Date	1/1/17
To Date	6/30/17
Short Name	Any
Available to Use	Yes
Lock Manager Share Task	Yes

3. In the Eligibility Profile for the Period section, complete the fields as shown in this table. Use the default values except where indicated.

Field	Value
Eligibility Profile	Any

4. In the Due Dates section, complete the due date for each task as shown in this table.

Task	Due Date
Set Goals	6/24/17
Worker Self-Evaluation	7/1/17
Manager Evaluation of Workers	7/8/17
First Approval	7/15/17
Share Performance Documents	7/20/17
Conduct Meetings	7/25/17
Provide Final Feedback	7/30/17

Task	Due Date
Set Next Period Goals	8/30/17

5. In the Questionnaires for the Period section, click **Add**.
6. In the Questionnaires for the Period section, complete the fields as shown in this table.

Field	Value
Template Role	Manager
Questionnaire Name	Any

7. Repeat steps 5 and 6, substituting Worker, Colleague, and Matrix Manager for Manager.
8. On the Document Periods tab, in the Document Periods section, click **Add**.
9. In the Document Periods section, complete the fields as shown in this table.

Field	Value
Name	2017 Performance Evaluation Second Half
Review Period	FY2017
From Date	7/1/17
To Date	12/31/17
Short Name	Any

10. In the Document Types for Interim Evaluations section, click **Add**.
11. In the Document Type field, select the document type selected on the general tab.
12. In the Due Dates section, complete the due date for each task as shown in this table.

Task	Due Date
Set Goals	12/23/17
Worker Self-Evaluation	1/8/18
Manager Evaluation of Workers	1/15/18

Task	Due Date
First Approval	1/18/18
Share Performance Documents	1/21/18
Conduct Meetings	1/24/18
Provide Final Feedback	1/31/18
Set Next Period Goals	12/31/18

13. In the Questionnaires for the Period section, click **Add**.
14. In the Questionnaires for the Period section, complete the fields as shown in this table.

Field	Value
Template Role	Manager
Questionnaire Name	Any

15. Repeat steps 13 and 14, substituting Worker, Colleague, and Matrix Manager for Manager.
16. Click **Save**.

Review Template Settings

1. On the Summary tab, review the settings you entered for the template.
2. Click **Save**.

Related Topics

- [Overview of Performance Documents](#)

Configure Anytime Performance Templates

You can configure a performance template from which you create anytime performance documents.

1. Go to **My Client Groups > Performance** and select the **Performance Templates** task.
2. Select the Anytime template type.
3. Configure the rest of the template using the same steps as creating a standard performance template, including document types, process flows, performance template sections, and document periods.

- When you create a anytime performance template, you can select or deselect the **Worker can select manager when creating document** check box on the Processing tab of the performance template. If selected, the worker can search and select a different manager other than the direct manager. The selected manager becomes the manager of the performance document.
- Remember that you can't configure performance templates for anytime documents with due dates. HR specialists can add them to individual employee performance documents after they're created using the **Performance Documents** administration task.

Selecting a Manager

Here are some factors that determine the manager name that displays in the list of values and how different roles can select it:

- For an employee, if **Worker can select manager when creating document** isn't selected:
 - If the employee has one direct manager who matches the manager type selected for the manager role in the performance template, the manager's name defaults.
 - If the employee has more than one direct manager who matches the manager type selected for the manager role in the performance template, the employee can select any of their direct managers.
 - If the employee doesn't have a manager who matches the manager type selected for the manager role in the performance template, the performance document won't display.
- If **Worker can select manager when creating document** is selected:
 - If the employee has one direct manager who matches the manager type selected for the manager role in the performance template, the manager name displays as the default but the employee if required, can still select any other employee as the manager.
 - If the employee has more than one direct manager who matches the manager type selected for the manager role in the performance template, the employee can select any other employee as the manager.
 - If the employee doesn't have a manager who matches the manager type selected for the manager role in the performance template, the employee can select any other employee as the manager.

For Managers:

- If the manager has only one manager relationship for the employee's assignment, then their name defaults to the assignment that has the relationship and can't be changed.
- If the manager has more than one relationship for the employee's assignment (for example, they are the line manager as well as the project manager on the employee's assignment) then the manager's name defaults to the same manager type as selected for the manager role in the performance template. But managers can still choose from any of their assignments that have a relationship with the employee. The assignments don't need to match the manager type selected for the manager role in the performance template.

For HR specialists:

- If the employee has one direct manager who matches the manager type selected for the manager role in the performance template, the manager name defaults but HR specialists can select any other employee as the manager.

If the employee has more than one direct manager who matches the manager type selected for the manager role in the performance template, HR specialists can select any other employee as the manager.

If the employee doesn't have a manager who matches the manager type selected for the manager role in the performance template, HR specialists can select any of the employee's direct managers.

Options for Updating In Use Performance Templates

You can edit performance templates that are already in use to change the attributes of the templates. To edit an existing template, use the **Performance Templates** task.

Search for and select this task in the Setup and Maintenance work area or go to **My Client Groups > Performance**.

Attributes You Can Edit on the Process Tab

On the Process tab, you can update these attributes of an in-use performance template:

- In the Alerts section, the number of days before a task due date alert is sent for both standard and critical alerts
- In the Rating Calculations section, if the **Calculate ratings** option is already enabled, these check boxes:
 - Display calculated ratings to worker
 - Display calculated ratings to participants
 - Display calculated ratings to manager
 - Display calculated ratings to matrix manager
- In the Processing Options section, these check boxes:
 - Display star ratings
 - Display Check-Ins
 - Display Feedback Notes
 - Display Requested Feedback
- In the Participant Options section, these check boxes:
 - Employee can assign participant roles that can view worker and manager evaluations
 - Manager can assign participant roles that can view worker and manager evaluations

Attributes You Can Edit on the Structure tab

On the Structure tab, you can update these attributes:

- The sequence number of the sections
- In the Performance Goals section, you can select or deselect the **Allow update goals action to update goal weights from goal management business process** option, if the **Populate with Worker Performance Goals** option is already enabled
- In the Performance Goals, Development Goals, and Competencies sections, you can update these options in the Processing by Role sub-section:
 - Item Ratings
 - Item Comments
 - Section Ratings

- Section Comments
 - Share Ratings
 - Share Comments
 - View Participant Names
 - View Participant Roles
- In the Overall Summary section, you can update these options in the Processing by Role sub-section:
 - Section Ratings
 - Section Comments
 - Share Ratings
 - Share Comments
 - View Participant Names
 - View Participant Roles
- In the Manager Final Feedback section, you can update these options in the Processing by Role sub-section for the **Manager** role:
 - Section Comments
 - Share Comments
- In the Worker Final Feedback section, you can update these options in the Processing by Role sub-section for the **Worker** role:
 - Section Comments
 - Share Comments
- In the Questionnaire section, you can update these options in the Processing by Role sub-section:
 - View Manager Questionnaire
 - View Worker Questionnaire
 - View Participant Questionnaires
 - View Participant Names
 - View Participant Roles

Attributes You Can Edit on the Document Periods Tab

On the Document Periods tab, you can add or remove these attributes:

- Document Periods
- Eligibility profiles
- Questionnaires for the period

You can also change the due dates for the tasks.

Automatic Updating of Performance Documents

When you save the updated performance template, a dialog box appears enabling you to review the changes. When you click **OK**, a process job starts automatically to update the template and all performance documents created from the template. The changes appear when a performance document is opened. If there is already a process job running for the template, you must wait until it completes before submitting it again.

Note that if you change the due dates, existing performance documents that were earlier created based on the edited template aren't affected. HR specialists need to manually update the due dates in the existing performance documents. The changed due dates apply only to the performance documents that are created after the template is edited.

Set Up Interim Evaluations in Performance Templates

You can create performance document types and configure performance templates and document periods to set up interim evaluations to appear in later performance documents.

You can configure the performance template to display ratings and comments for individual content items, section ratings, and the overall summary rating. This topic describes how to create document types and document periods to configure interim evaluations in which ratings and comments appear in successive performance documents, a project evaluation, and an annual performance document.

Before You Begin

Set up the performance process flow and the review period.

1. Create performance process flows to include tasks for the manager and worker rating the worker for the annual and quarterly evaluations, and the project evaluations. You can use the same process flow for both.
2. Create the sections required by the process flow, including at least these three sections:
 - Profile Content (Competencies)
 - Performance Goals or Development Goals
 - Overall Summary
3. Create a review period to use in all performance document periods.

Create Document Types

For this procedure, you create document types to use in two performance templates:

- **Project Evaluation:** Evaluate workers for a project completed within the annual evaluation period. Ratings and comments for the project evaluation appear in the annual evaluation.
 - **Annual and Quarterly:** Evaluate workers quarterly and annually. The ratings and comments for each interim quarter appear in the subsequent quarter and annual evaluations.
1. Go to **My Client Groups > Performance > Performance Document Types**.
 2. In the **Search Results** section of the Performance Document Types page, click **Create** to open the **Create Performance Document Types** page.
 3. In the **Name** field, enter **Project Evaluation**.
 4. (Optional) Enter a description.

5. Enter the **From Date** and **To Date**. These dates must be the same as or extend beyond the date range of the performance templates in which they're used.
6. Keep the default status of **Active**.
7. Select the check box **Worker can select manager when creating document** to let workers select the manager who manages their performance documents.
8. Click **Save and Close**.
9. Click **OK**.
10. Repeat steps 2 through 6 and 8 to 9 to create the Annual and Quarterly document type. For step 3, enter the name **Annual and Quarterly**.

Set up the Project Evaluation Performance Template

In this procedure, you create the performance template for the project evaluation, which is one of the interim documents that appears in the annual evaluation.

1. Go to **My Client Groups > Performance > Performance Templates**.
2. In the **Search Results** section of the Performance Templates page, click **Create** to open the **Create Performance Template** page.
3. Set up the **General** tab.
 - a. Select the **Template Type** as **Anytime**.
 - b. Enter a name and optionally comments.
 - c. Enter the **From Date** and **To Date**. The **From Date** must be the same or later than, and the **To Date** the same as or earlier than the **From Date** and **To Date** range of the performance document type, process flow, roles, and sections used in the template.
 - d. Leave the status as **Active**. In the **Document Type** field, select **Project Evaluation**.
 - e. In the Eligibility Profile section, add eligibility profiles to limit the performance documents to eligible employees, if required by your business process.
 - f. In the Participation section, select participant minimums, if required by your business process.
 - g. Click **Add** to add the roles that evaluate the employee.

Note: Make sure that you add manager and employee roles to the template as only their ratings and comments appear in interim evaluations.
4. Set up the **Process, Structure, and Content** tabs.
 - a. Click the **Process** tab.
 - b. In the **Process Flow** field, select a process flow for the project evaluation.
 - c. Set up the Alerts, Calculation Rules, Processing Options, and Participant Options sections as required for your business process.
 - d. Click the **Structure** tab.
 - e. In the Sections region, click **Add** to add the first section required for the tasks required in the process flow.
 - f. Set up the Section Processing, Item Processing, Section Content, and Processing by Role sections as required to conform to your business process. Note: Ensure that you add manager and employee roles to the section as only their ratings and comments appear in interim evaluations.
 - g. Repeat steps 4e and 4f for each section required by the process flow.
 - h. Click the **Content** tab.
 - i. Add content items to the Goals and Competencies sections, if required by your business process.
5. Click the **Document Periods** tab.

6. Set up the Document Periods tab.
 - a. In the Document Periods section, click **Add**.
 - b. In the **Name** field, enter a name. The name is the name of the project evaluation performance document.
 - c. Select a **Review Period**. The review period must be the same used for the annual performance template.
 - d. Edit the performance document start and end dates, if required for your business process.
 - e. Enter a **Short Name** for the period.
 - f. Add eligibility profiles as required for your business process.
 - g. Enter the **Due Date** for each task.
 - h. Select the **Available to Use** check box.
 - i. Select the **Lock Manager Share Task** check box if you don't want managers to share the document with employees during the calibration period.
 - j. Add roles and select questionnaires as required for your business process.
7. Click the **Summary** tab.
8. Review the template and click **Save and Close**.
9. Click **OK**.

Set Up the Annual and Quarterly Performance Template

In this procedure, you configure the performance template used for both the annual and quarterly evaluations. On the **Document Periods** tab, you configure the periods for each so that each quarterly performance document is an interim evaluation. Ratings and comments for each appear in the subsequent quarterly and annual evaluations. You also configure the annual document period so the project evaluation ratings appear.

1. Go to **My Client Groups > Performance > Performance Templates**.
2. In the Search Results section of the **Performance Templates** page, click **Create** to open the **Create Performance Template** page.
3. Set up the **General** tab.
 - a. Keep the default **Template Type** as **Standard**.
 - b. Enter a name and optionally, comments.
 - c. Enter the **From Date** and **To Date**. The **From Date** must be the same or later than, and the **To Date** the same as or earlier than the **From Date** and **To Date** range of the performance document type, process flow, roles, and sections used in the template.
 - d. Leave the status as **Active**. In the **Document Type** field, select **Annual and Quarterly**.
 - e. In the Eligibility Profile section, add eligibility profiles to limit the performance documents to eligible employees, if required by your business process.
 - f. In the Participation section, select participant minimums, if required by your business process.
 - g. Click **Add** to add the roles that evaluate the employee.

Note: Ensure that you add manager and employee roles to the template as only their ratings and comments appear in interim evaluations.
 - h. Click the **Process** tab.
4. In the **Process Flow** field, select a process flow for the annual and quarterly evaluations.
5. Repeat steps 4b through 4i from the Set up the Project Evaluation Performance Template procedure.
6. Click the **Document Periods** tab.
7. Configure the document period for the first quarter evaluation.
 - a. In the Document Periods section, click **Add**.

- ## FAQs for Performance Templates

You have the option to copy all document period information, if it exists, including eligibility profiles, from the original template. Edit the document period name and short period name on the Document Periods tab to avoid having **Copy**

in the title. If you copy periods, the new template opens, otherwise the template appears in the search results list, from where you can open it.

If the template you duplicate is in use, the **In Use** status of the copied template is set to **No**. This lets you edit the new template before making it available. If eligibility profiles are added, documents created from the template aren't available until eligibility is processed.

What's a participation role in the performance template?

A role that can access the performance document created from the performance template. You must add to the template every role that is required to participate in viewing, or providing ratings or participant feedback in the performance document.

For example, if the process flow requires that managers rate workers and share the performance document, but workers don't provide ratings, you must add both the manager and worker roles. You can select a minimum number of participants required for each role to provide feedback, but the number is a guideline and not enforced.

16 Check-In Templates

Create a Check-In Template

Before you can create check-in documents, you must have check-in templates available in the application.

When you create check-in templates, you determine these features of check-in documents:

- Associate check-in documents with specific performance review periods or all review periods.
- Include discussion topics for performance goals, development goals, questionnaires, or general discussion topics.
- Make the template available to employees by specifying one or more eligibility profiles.

Follow these steps to create a check-in template:

1. Go to **Home > My Client Groups > Performance**, scroll down to the Setup Maintenance section and click **Check-In Templates**.
2. Click **Create** to create a new template.
3. Enter a name for the template, and add comments, if any.
4. In the **From Date** and **To Date** fields, specify the period during which an employee or manager can create check-in documents from this template.
5. From the **Review Periods** list, select specific performance review periods or all review periods to associate with the template.

Note:

 - If you dissociate a check-in template from a review period, there's no impact on employees' existing check-in documents.
 - You can specify or change review periods even if a check-in template is inactive. These review periods will come into effect when the template is activated later.
6. From the **Status** list, select whether the check-in template is active or inactive.
7. Select **Include in Performance Document** to automatically include a check-in document created from this template in a performance document.
8. Select one or more options in the Check-In Content section, as shown in this table.

Check-In Content Options	Description
Development goals	Employees or managers can create discussion topics for their active development goals in the check-in document.
Add default discussion topics for development goals	Automatically creates discussion topics for active development goals in the check-in document.
Performance goals	Employees or managers can create discussion topics for their active performance goals in the check-in document.

Check-In Content Options	Description
Add default discussion topics for performance goals	Automatically creates discussion topics for performance goals in the review period in the check-in document.
General discussion topics	Employees or managers can create general discussion topics in the check-in document.
Questionnaire	Specify a questionnaire for the employee or manager, or both.

9. In the Eligibility Profile section, you can make the template available to eligible employees who meet one or more eligibility criteria. Click **Add Row**, and select one or more eligibility profiles. Select **Required** to make an eligibility profile required among the set of eligibility profiles you've selected. For example, if you want only Sales employees who are either in the UK or the US to create check-in documents, add the **Sales**, **UK**, and **US** eligibility profiles to the template, and make the **Sales** eligibility profile as **Required**, but not the **UK** or **US** profiles.

Note: Ensure you schedule the eligibility batch process to assign check-in templates to eligible profiles.

10. Click **Save and Close**.

Related Topics

- [Guidelines for Associating Eligibility Profiles with Check-In Templates](#)

Guidelines for Associating Eligibility Profiles with Check-In Templates

Add eligibility profiles to a check-in template to restrict which check-in documents can be created for employees.

To manage check-in templates, use the Check-In Templates task. Search for and select this task in the Setup and Maintenance work area or go to My Client Groups > Check-In Templates.

Add Eligibility Profiles

You can add eligibility profiles to check-in templates to determine which employees check-in documents can be created for. For example, if you want different content in check-in documents for employees in the US and UK, you can create 2 templates and attach different eligibility profiles to each of them. Then it will only be possible to create check-in documents for employees from the relevant template.

Mark Eligibility Profiles as Required

You can specify whether an eligibility profile added to a check-in template is required. If an eligibility profile is required, employees must be eligible for that profile to create check-in documents using that template.

If the check-in template has 2 or more eligibility profiles that aren't required, employees must be eligible for at least one of the profiles to be able to create check-in documents using that template.

For example, to create a specific check-in template for Sales employees who are either in the UK or the US, you can add a required eligibility profile for employees with a Sales job. Then you can add 2 additional eligibility profiles for the employees located in the US or UK.

Add or Remove Eligibility Profiles when the Template is in Use

You can add or remove eligibility profiles even if the template or period is in use. But when you remove an eligibility profile from a template it will not impact any existing created check-in documents.

Related Topics

- [Create a Check-In Template](#)

Edit a Check-In Template

When a check-in template is being actively used to create check-in documents, you can go ahead and edit the template's **Name**, **Comments**, and **To Date** fields as well as the Eligibility Profile section. However, you can't make changes to the Check-in Content section.

When you modify the eligibility profile, it doesn't impact check-in documents that were already created. However, new check-in documents can be created only by those employees who match the modified eligibility profile. When you specify a template's end date (in the **To Date** field), users can't create check-in documents after that date.

If the check-in template isn't in use, you can set its status to **Inactive**.

To edit a template, follow these steps:

1. Go to **Home > My Client Groups > Performance**, scroll down to the Setup Maintenance section, and click **Check-In Templates**.
2. Search for the template by specifying one or more search criteria. To view all available templates, click **Search** without specifying any search criteria.
3. From the search results area, click the template name to edit it.

Note: You can check whether a check-in template is in use or not from the search results area.

Delete Future Scheduled Check-ins for Inactive Assignments

You can delete future scheduled Performance or Touchpoints check-ins for attendees (either the employee or the named check-in manager) with inactive assignments using the Delete Future Check-ins for Inactive Assignments scheduled process so that redundant check-in information isn't stored.

1. Click **Navigator > Tools > Scheduled Processes**.
2. Click Schedule New Process. Search and select the Delete Future Check-ins for Inactive Assignments process.
3. In the Process Details dialog box, select the action. You can preview which check-ins will be deleted or update which will process the deletions.

4. Select all check-in templates or specific check-in templates. For specific, you can select more than one check-in template.
5. Select a parameter.
 - Department - Specific department to which the employees belong.
 - Manager Person Number - Person number of a specific manager.
 - Worker Person Number - Person number of a specific employee.
6. Submit the process.

When the process runs, it checks if there are any scheduled check-ins after the employee's assignment or the manager's work relationship was made inactive. Check-ins identified this way are deleted along with any notes and associated questionnaires created for that check-in.

Manage Check-In Documents Using HCM Data Loader Tools

Streamline the mass upload of check-in documents by using the HCM Data Loader or the HCM Spreadsheet Data Loader tools.

Using these tools, you can upload a number of check-in documents along with discussion topics for performance and development goals, general discussion topics, and related questionnaires. You can also update or delete existing check-in documents using these tools.

To upload check-in documents using HCM Data Loader, you need to use the CheckInDocuments.dat file. To upload using HCM Spreadsheet Data Loader, you need to create a check-in spreadsheet template first and then upload the template.

To access these tools, go to **My Client Groups > Data Exchange**.

For more information on performing these tasks, refer to the HCM Integrations Guide and the HCM Business Objects Guide.

Dispose Check-in Documents

To meet your data protection requirements, you may want to dispose a terminated employee's check-in documents and associated data. To do this, run the **Remove Person Information** task from **My Client Groups > Data Exchange**.

Before you can perform this task, the administrator needs to first access the **Configure Person Information Removal Policies** task from the Data Exchange work area and include the **Check-In Document** business object in a new or existing template.

For more information about running this task, see the HCM Integrations and Data Loading guide.

17 Feedback

Feedback Templates

Create feedback templates as per your organization requirements. You need to specify a questionnaire and set the template status to Active so that feedback templates are available when creating a feedback request.

As an administrator, you can manage feedback templates in: **My Client Groups > Performance > Setup Maintenance > Feedback Templates**.

If the feedback template is in use, the application indicates it in the **Feedback Templates** page. When the feedback template is **Active**, you can modify the template name and description, but not the questionnaire.

You can set the template status to **Inactive** so that no feedback requests are created using the inactive template.

When the feedback template isn't in use, you can:

- Change the questionnaire in the feedback template
- Delete the feedback template

18 Customize Feedback Pages

How You Disable the Feedback Tab from Person Spotlight for Employees

Using HCM Experience Design Studio, you can hide the Feedback tab from an employee's person spotlight page.

Before you start

Create a sandbox and activate it.

Here's what to do

1. Go to **My Client Groups > HCM Experience Design Studio**.
2. From the left navigation menu, select **Person Spotlight**.
3. Edit the **Feedback** section.
4. From the **Visible** list, select **Expression**.
5. In the **Expression** field, type this EL expression and substitute the **Role Name** value with the employee seeded abstract role:

```
securityContext.userInRole['<Role_Name>']
```

6. Click **Save**.
7. Click **Done**.

Results:

The Feedback tab section is now hidden from the employee's person spotlight page.

Related Topics

- [Create and Activate Sandboxes](#)

How You Disable the Feedback Requests About Me Section for Employees

You can disable feedback sections for specific user roles using Page Composer and EL expressions. This procedure describes how you can disable the Feedback Requests About Me section from an employee's feedback spotlight page.

Before you start

Create a sandbox with the **Structure** and **Page Composer** tools in it, and activate it.

Here's what to do

1. Open a feedback spotlight page. For example, go to **Me > Quick Actions > Show More > Feedback**.
2. Click your user name or image in the global header, and select **Edit Pages**.

3. Click the **Structure** tab. A component panel appears at the end of the page. Drag it to the middle of the page to view the list of page components.
4. Select the **Feedback Requests About Me** section heading on the Feedback page. If a dialog box appears, prompting you to confirm editing of the component, click **Edit**.
5. In the component panel, select the **panelCollectionEdit** value.
6. On the component panel's toolbar, click the **Show the properties of panelCollectionEdit** icon.
7. In the dialog box that appears, click the **Show Component** menu, and select **Expression Builder**.
8. Type this EL expression and click **OK**:

```
#{{!(pageFlowScope.params['pLoggedInPersonId'] eq pageFlowScope.params['pWorkerPersonId'])}}
```

9. Click **Apply**, and then click **OK**.
10. Click **Close** on the top right of the page to exit the Edit Pages mode.

Results:

The Feedback Requests About Me section is now hidden when an employee views their feedback spotlight page.

Related Topics

- [Create and Activate Sandboxes](#)

19 Notifications

Overview of Notifications

As an administrator, you can configure the application to send notifications to different roles such as the HR specialist, manager, and employee for various performance management tasks.

The application can send notifications in these scenarios, for example:

- Notification to a manager when a worker completes their self-evaluation in a performance document.
- Notification to an employee when the manager creates a new check-in document for them.
- Notification to the feedback provider when you request feedback from them.

When you enable notifications, users get notifications by email or through the **Notifications** icon on the global header.

Performance Document and Participant Feedback Notifications

You can configure notifications for completing various tasks in performance documents, or for actions such as creating or completing performance documents.

You can also configure notifications for various participant feedback actions, such as requesting or receiving feedback.

Check-In Notifications

You can configure the application to send notifications when different roles create or delete check-ins, discussion topics in check-ins, or notes for discussion topics:

- When an employee makes any of the above changes, it sends notifications to the performance manager.
- When the performance manager makes these changes, it sends notifications to the respective employees.
- When an HR specialist makes these changes, it sends notifications to the performance manager and the employee.

Note: When a user deletes a check-in document or a discussion topic, the application doesn't send separate alert notifications for any deleted notes within the check-in document or discussion topic. It sends a notification only once for the deleted discussion topic or check-in document.

Requested Feedback Notifications

You can configure the application to send notifications to all persons associated with the feedback, such as the feedback requester and feedback provider, in these scenarios:

- You send a feedback request for yourself or others.
- You request the feedback provider to revise their feedback.
- You request feedback on goals and request revisions on such feedback.
- The feedback provider completes their feedback or revises their feedback.
- You delete a feedback request.

Related Topics

- [Configure Performance Management Notifications Using Reports](#)

Configure Notifications for Performance Documents and Participant Feedback

You can configure notifications for tasks related to performance documents and participant feedback either using **My Client Groups** or using the **Setup and Maintenance** work area.

Configure Using My Client Groups

1. Go to **My Client Groups > Performance > Talent Notifications**.
2. Enable the notifications you need.

Configure Using Setup and Maintenance

1. Open the **Settings and Actions** menu on the global header, and select **Setup and Maintenance**.
2. Select **Workforce Development** from the Setup list.
3. Search for the **Performance Notifications** task and select it from the search results.
4. Click the **Performance Management** tab and enable the notifications that you want to send.

Configure Notifications for Check-Ins and Requested Feedback

As an HR specialist, you can configure notifications for check-ins and requested feedback using Alerts Composer.

Before you start

You need to have the HRC_ACCESS_ALERTS_COMPOSER_PRIV privilege to do so.
Here's how you configure the notifications:

Here's what to do

1. From Home, go to **Navigator > Tools > Alerts Composer**.
2. Search for the keywords, **check-in** or **feedback**, to see the related alerts.
3. Select **Edit** from the Action menu next to the alert that you want to enable or disable.
4. On the Edit Event Alert page, you can see the available email templates sent to different roles as part of the alert. They are enabled by default.
5. You can enable or disable each of the email templates from the **Enabled** list.
6. Click **Save and Close**.

Related Topics

- [Overview](#)

Configure Notifications for Requested Feedback Reminders

You need to enable the alert notification template, **Requested feedback reminder**, in Alerts Composer to send due date reminders.

1. From Home, go to **Navigator > Tools > Alerts Composer**.
2. Search for the **HRA_FEEDBACK_REQUESTED** alert.
3. Click the alert name from the search results.
4. On the **Templates** tab, enable the **Requested feedback reminder** template.
5. Click **Save and Close**.

Related Topics

- [Overview](#)

