

# Oracle Fusion Cloud Talent Management

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## **Using Performance Management**

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Oracle Fusion Cloud Talent Management  
Using Performance Management

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## Get Help

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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 Support

You can get support at [My Oracle Support](#). For accessible support, visit [Oracle Accessibility Learning and Support](#).

## Get Training

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## Learn About Accessibility

For information about Oracle's commitment to accessibility, visit the [Oracle Accessibility Program](#). Videos included in this guide are provided as a media alternative for text-based topics also available in this guide.

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You can email your feedback to [oracle\\_fusion\\_applications\\_help\\_wv\\_grp@oracle.com](mailto:oracle_fusion_applications_help_wv_grp@oracle.com).

Thanks for helping us improve our user assistance!



# 1 Performance Evaluation

## Overview of Performance Documents

Using performance documents, managers, workers, and participants can evaluate other workers and themselves on goals and competencies by means of ratings and comments.

**Note:** Performance documents can be created for any type of worker including employees, contingent workers, and non-workers, depending on business needs.

These roles create two types of performance documents, standard and anytime, depending on their requirement:

- HR specialists create standard performance documents for the entire organization. For example, for the purpose of an annual performance evaluation.
- HR specialists, managers, or workers create anytime performance documents when they want to evaluate projects or performance improvement plans, or for any occasion that needs a formal evaluation.

In addition, as part of the evaluation, managers and workers perform these tasks:

- Set performance and development goals and competencies in a performance document to evaluate and rate workers.
- Share ratings and comments with workers, who in turn acknowledge them.
- Conduct and track review meetings, and process approvals.
- Add and remove competencies directly in the employee performance document.

HR specialists and managers can perform administrative actions to maintain worker performance documents, maximize efficiency, and prevent bottlenecks.

## Performance Templates

Performance documents are based on performance templates. When creating a template, you specify whether it's used for creating standard performance documents or anytime performance documents.

In a template that's meant for creating standard performance documents, you need to specify the performance document name, review period, and sequence of tasks that might need to be completed within specific due dates. In a template that's meant for creating anytime performance documents, you can specify the same details, but can't specify the due dates for tasks.

While you create one standard performance document for each worker assignment, you can create multiple anytime documents for the same worker assignment.

## Prerequisites for Creating Performance Documents

Before you can create standard or anytime performance documents for workers, please ensure these prerequisites are met:

- If the performance document has an eligibility profile associated with it, ensure the worker meets the eligibility criteria and ensure the eligibility batch process is run.

- Workers need to have an assignment start date that's before the performance document end date.
- Workers need to have a manager in their assignment. If a worker doesn't have a manager, for example, they're the head of the company, then you can create a dummy manager for them.
- If the performance template includes a Performance Goals section that doesn't use synchronized goals, you can create performance documents only for workers who have a goal plan that matches the configuration of the Performance Goals section.

## Administration Actions

HR specialists use administration actions to keep the performance evaluation process moving when there is an interruption or mistake. For example, a worker submits a document prematurely before completing their self-evaluation. HR specialists can perform administration actions for workers to whom they have access to in their security profile. Managers can perform administration actions for workers whose performance documents they manage.

**Note:** To perform administrative actions, HR specialists must have a person record.

As an HR specialist, you can access the administration actions from these pages:

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

Action	HR Specialist	Manager	Description
Create Performance Documents	Yes	No	HR specialists can create standard performance documents for scheduled evaluations for workers. They create an individual standard performance document for each worker assignment.
Create Anytime Performance Documents	Yes	Yes	HR specialists, managers, and workers can create anytime documents for other evaluations for projects, performance improvement plans, or any other occasion where they need to record a formal evaluation. They can create multiple anytime documents for the same assignment for a worker.
Send Email Notification	Yes	No	Send email notifications throughout the selected organization to remind workers and managers of upcoming events and tasks in the performance management business process.
Transfer Performance Documents	Yes	Yes	Transfer a worker's performance document from one manager to another, for example, when

Action	HR Specialist	Manager	Description
			the worker is assigned to a new manager, or the manager leaves the organization. HR specialists can transfer multiple performance documents at one time.
Change Task Due Date	Yes	No	<p>Edit the due date of any task within a standard performance document that wasn't completed or canceled.</p> <p><b>Note:</b> Although anytime performance documents can't have default due dates for tasks, the HR specialists can add due dates to the documents themselves at the time of creating them.</p>
Change Feedback Due Date	Yes	Yes	When using feedback, edit the due date by which participants provide feedback, if the feedback isn't completed and participants aren't locked out from providing feedback. Participants can still provide feedback after the due date. Workers can also perform this action.
Change Current Task	Yes	No	<p>Move performance documents forward from the current task to another task, though the current task isn't completed. All performance documents you move in one action must be on the same current task. The status of the task that was moved past changes to Bypassed.</p> <p>Move performance documents back from tasks in any status to a previously completed task. All tasks from the new current task forward reset to In Progress.</p>
Bypass Worker Self-Evaluation	Yes	Yes	As a manager or HR specialist, if you bypass the worker's self-evaluation task, you can view any ratings, comments, and questionnaire responses already entered by the worker. While managers can bypass the worker's self-evaluation task, they can't change the status of other tasks unless they complete them.

Action	HR Specialist	Manager	Description
			<p><b>Note:</b> The HR specialist bypasses worker self-evaluations using the Change Current Task action.</p>
Cancel Performance Documents	Yes	Yes	<p>Cancel a performance document to remove it from normal processing. Canceled documents aren't deleted permanently from the application.</p> <p>When a performance document is canceled, any competencies, overall ratings, or section ratings that were updated in a worker's profile through the performance document are removed.</p> <p>HR specialists can cancel multiple performance documents at one time.</p>
Delete Performance Documents	Yes	Yes	<p>Delete canceled performance documents permanently to remove documents that are no longer valid. HR specialists can delete multiple performance documents at one time.</p>
Delete Participant Feedback	Yes	No	<p>Remove any participant, regardless of the participant's feedback status, which also removes that participant's feedback for that worker.</p>
Complete Performance Documents	Yes	Yes	<p>Change a performance document to Completed status when a worker or manager hasn't completed all the tasks in a performance document, and has halted the final processing of the document.</p>
Reopen Performance Documents	Yes	Yes	<p>Reopen a completed performance document so that the manager or worker can continue to evaluate the worker. Reopening a document changes the status of the last task to In Progress. HR Specialists can change the current task to an earlier task in the process flow, if required.</p>
Restore Performance Documents	Yes	Yes	<p>Restore any canceled performance document to its previous status. If the previous status was Completed, the worker's profile will be updated with any competencies,</p>

Action	HR Specialist	Manager	Description
			overall ratings, or section ratings from the performance document, if they are configured.
Process Eligibility for Performance Documents and Check-Ins	Yes	No	Process or change eligibility for performance documents and check-ins for a specified worker.
Monitor Late Tasks in Performance Documents	Yes	No	Search performance documents for tasks that are late and change task due dates. Send email notifications to workers and managers reminding them to work on the performance documents.

The worker or manager can open a standard or anytime performance document when the first scheduled task in the sequence of tasks is available to that role. For example, assume the first scheduled task of a performance document is Set Goals, which the manager performs. If the next task in the document is Worker Self-Evaluation, the worker can't open the document to start the Worker Self-Evaluation task until the manager completes the Set Goals task.

#### Related Topics

- [How can I create a performance document for the terminated assignment of a worker?](#)

## 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.

## Human Resource Specialist Creates Performance Document for Worker

HR specialists create performance documents for anyone to whom they have security access.

They can create these types of performance documents:

- One standard performance document for a worker or manager for each assignment, such as an annual evaluation
- Multiple anytime performance documents for an assignment, such as a monthly project evaluation

**Note:** They can create both standard and anytime performance documents for a suspended or terminated worker or assignment.

## Create Standard Performance Documents

As an HR specialist, you can create standard performance documents in different ways:

- By using the **Create Performance Document** administration task for specific workers
- By using the **Process Mass Actions for Performance Documents** task for groups of workers
- While running the eligibility batch process (only if an eligibility profile is associated with the performance document period in the performance template)
- By using HCM Data Loader for multiple workers at the same time

If you don't choose to create performance documents while running the eligibility process, you can create them later using the other methods. When you create the document, goals and competencies may be added depending on the configuration.

**Note:** When you create a performance document using the **Create Performance Document** administration task, the manager and worker receive a notification about it, if notifications are enabled. The other methods of creating performance documents do not trigger notifications.

## Create Standard Performance Documents for Specific Workers

Here's how you create standard performance documents for specific workers by using the **Create Performance Document** administration task:

1. Go to **My Client Groups > Performance > Performance Documents**.
2. Click **Create Document**.
3. Search for eligible workers by specifying a review period and performance document name. Then, type the name of a worker, manager, or department to start the search.

4. Select the workers for whom you want to create performance documents.
5. Click **Continue**.
6. (Optional) Change the dates, if required. These must be within the document period start and end dates defined in the performance template.
7. (Optional) Select the manager of the performance document. The manager must have access to the worker to manage the document.
8. (Optional) Specify a reason for creating the document.
9. Click **Submit**.

## Create Standard Performance Documents for a Group of Workers

Here's how you create standard performance documents for groups of workers at once using the **Process Mass Actions for Performance Documents** task:

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

### Related Topics

- [Why does the performance document contain competencies and goals before I have added any?](#)
- [HCM Data Loader and Performance Business Objects](#)
- [Eligibility Batch Process for Performance Documents and Check-In Templates](#)

## View Standard Performance Documents

Depending on your role, you can view standard performance documents in different ways.

- If you're an employee, go to **Me > Career and Performance > Performance**. Select the review period for which the performance documents exist. The documents appear under the Performance Documents section.
- If you're a manager, to view your team's standard performance documents, go to the Goals and Performance Overview page under **My Team**. You can see the performance documents listed under each of your reports for the current review period.

When you want to evaluate performance documents, use the manager Evaluate Performance page. You will see performance documents for which you are the performance document manager for the current review period.

- If you're an HR specialist, you can access standard performance documents using the HR administration task, **Performance Documents**, under **My Client Groups > Performance**.
- If you're a nonassigned manager of the employee, you can view the standard performance documents region and standard performance documents if you have the Manage Performance Document Data privilege. Standard performance documents are read-only if you're not the performance document manager.

# Anytime Performance Documents

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

They can create anytime performance documents for annual evaluations (in addition to standard performance documents) and at any time during a review period. They can also create multiple anytime documents for the same assignment for an employee.

Remember that you must configure a performance template for anytime documents before you begin creating them.

## Related Topics

- Configure Anytime Performance Templates

# Create Anytime Performance Documents

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

## Before you start

To create anytime performance documents using smart navigation actions or quick actions, you must have the ORA\_HRA\_CREATE\_ANYTIME\_PERFORMANCE\_DOCUMENT privilege.

## Here's what to do

- Depending on your role, access the page where you create anytime documents:

Who	How
Employee	<ol style="list-style-type: none"><li>Go to <b>Me &gt; Career and Performance &gt; Performance</b>.</li><li>Select the review period for which an anytime performance document template exists.</li><li>Scroll to the Anytime Documents section, and click <b>Add</b>.</li></ol>
Manager	<ol style="list-style-type: none"><li>Go to the Goals and Performance Overview page under <b>My Team</b>.</li><li>Click the <b>Actions</b> menu (shown by three dots) next to an employee, and select <b>Add Anytime Document</b>.</li></ol> <p><b>Note:</b> You can also go to <b>My Team &gt; My Team</b> and do these steps.</p>
HR Specialist	<ol style="list-style-type: none"><li>Go to <b>My Client Groups &gt; Performance &gt; Performance Documents</b>.</li><li>Click <b>Create Document</b>.</li><li>Search for the employees for whom you want to create the documents by specifying the review period, anytime performance document name, and manager, department, or employee name.</li><li>Select the employees and click <b>Continue</b>.</li></ol>

All of the above roles can create anytime documents using quick actions too.

- Enter or review these details in the anytime document:

- Review period:** Select the review period to filter the list of anytime performance documents.
- Performance document name:** Select the anytime performance document.

- c. **(Optional) Description:** When you enter a description, the application appends the description to the anytime document name. This helps differentiate between multiple anytime documents with the same name. For example, if you create an anytime document called Monthly Review every month, you can specify the name of the month in the description to differentiate between the document names.
- d. **(Optional) From Date and To Date:** You can change the dates but they must be within the default dates shown, as these dates are defined in the performance template.
- e. **(Optional) Performance Document Manager:** Workers, managers, and HR specialists can enter the name of the manager of the performance document. The manager must have access to worker data to manage the performance document.
- f. **(Optional) Reason:** This appears only for HR specialists. They can select from a list of reasons for creating anytime documents.

## View Anytime Performance Documents

Depending on your role, you can view anytime performance documents in different ways.

- If you're an employee, go to **Me > Career and Performance > Performance**. Select the review period for which the performance documents exist. The documents appear under the Anytime Documents section.
- If you're a manager, to view your team's anytime performance documents, go to the Goals and Performance Overview page under **My Team**. You can see a count of the anytime performance documents listed under each of your reports for the current review period.

When you want to evaluate performance documents, use the manager Evaluate Performance page. You will see the list of performance documents for your reports for the current review period. To see anytime performance documents, make sure you select the **Anytime** filter.

- If you're an HR specialist, you can access standard performance documents using the HR administration task, **Performance Documents**, which is available under **My Client Groups > Performance**.
- If you're a nonassigned manager of the employee, you can view the anytime documents region and anytime documents if you have the Manage Performance Document Data privilege. You can see Add, if you have the Create Anytime Performance Document Data privilege. Anytime documents are read-only if you're not the performance document manager.

## Check-In Documents

Performance check-ins are a simple way of tracking regular conversations between managers and employees about their work and goals throughout the year.

Check-ins can take place as frequently as your organization recommends.

Check-in documents can contain questionnaires, general topics, or performance and development goals, based on the template configuration, which can be updated with notes from the manager or employee. Employees can create their own check-in documents to discuss with their managers, or managers can create check-in documents for their reports, depending on the organizational requirement.

Check-in documents don't have defined tasks assigned to the manager and employee. The check-in documents remain open, and you can update them at any time.

You create a check-in document based on a check-in template and for a specific review period. Depending on the check-in template you use, performance and development goals might be defaulted as discussion topics in the check-in document. When you update a check-in document, like add or delete a note or discussion topic for example, the application sends notifications to the employee or manager, if notifications are enabled. To enable check-in related notifications using Alerts Composer, see [Related Topics](#).

## Adding Goals as Discussion Topics

Employees' performance and development goals can be defaulted or manually added as discussion topics in a check-in document.

If you cancel a performance goal or make a development goal inactive after adding it as a discussion topic in a check-in document, the existing discussion topic isn't affected. But you can't add the canceled performance goals or inactive development goals as new discussion topics in other check-in documents.

**Note:** Using HCM Data Loader, HR specialists can add discussion topics to check-in documents for multiple employees.

## Create a Check-In Document

Both employees and managers can create check-in documents. Employees can create check-in documents for their line manager or an indirect manager such as matrix manager. If employees have multiple assignments, they can select a specific assignment for which they want to create the check-in and also select the manager for that assignment.

When selecting a manager for the check-in, the manager list that displays is controlled by the values specified in the `ORA_HRA_MANAGER_LEVELS` profile option. Based on the values specified, here's how the levels display:

- Direct managers if the profile option `ORA_HRA_MANAGER_LEVELS` is Null. System considers this as 1.
- Direct managers of their managers if the profile option `ORA_HRA_MANAGER_LEVELS` is set to 2 or above.
- Indirect managers of their managers if the profile option `ORA_HRA_MANAGER_LEVELS` is set to 3 or above.

Managers can create check-in documents for both direct and indirect reports. When creating a check-in for an indirect report, the manager's name defaults as the check-in manager and can't be changed.

HR specialists can create check-ins on behalf of employees and managers, but they must add their own progress notes and questionnaire responses.

Here's an example of how to create a check-in document:

1. Select the employee.
2. Select the manager (the default value is the line manager if the employee or HR is creating the check-in, but other managers can be selected if the employee has them).
3. Select the review period (this isn't required for Touchpoints check-ins).
4. Select a template. For example, your organization may have different templates for weekly and performance check-ins (this isn't required for Touchpoints check-ins).
5. The check-in name is defaulted based on the template and date.
6. Enter the check-in date. The default value is the current date.
7. When creating a check-in in the Details section, add or review these details:

- Review the discussion topics in the check-in or add new ones.
- Progress notes and questionnaire responses for discussion topics can be added to the check-in before, during or after the check-in.

8. Ensure the check-in is scheduled or updated to save any changes.

**Note:**

- Using HCM Data Loader, HR specialists can create check-in documents for multiple employees at the same time.
- Employees, managers, and matrix managers can create check-in documents for their reports if they have the Manage Check-in Document privilege.

## Edit a Check-In Document

An employee or a check-in document manager can edit these in a check-in document:

- Check-in date
- Questionnaire responses
- Performance or development goal details (such as basic info, measurements, and tasks), if the goal or development plan configuration allows them to do so
- Notes associated with a performance or development goal discussion topic
- General discussion topics, if included

A manager can only see the check-ins if they're the named check-in manager. If they have the View Check-in Document privilege, they can see all the check-ins for the employees they have access to.

An HR specialist can edit these in a check-in document, if they have the Manage Check-in Document privilege:

- Review period
- Document name
- Check-in date
- Check-in manager (if there are no notes added to discussion topics or no questionnaire responses provided)
- Performance or development goal details (such as basic info, measurements, and tasks), if the goal or development plan configuration allows them to do so
- Notes associated with a performance or development goal discussion topic
- General discussion topics, if included

## Delete a Check-In Document

If you're an employee or manager with the Manage Check-in Document privilege, you can delete these:

- A check-in document (if it contains questionnaire responses or discussion topic notes created only by you)
- A discussion topic (if it contains notes created only by you)
- Notes for a goal discussion topic (if you created it)

The HR specialist with the Manage Check-in Document privilege can delete any check-in document, discussion topic, or note, regardless of who created them.

**Note:** Using HCM Data Loader, HR specialists can delete check-in documents for multiple employees at the same time.

## All-in-One Evaluations

Use the All-in-One Evaluations page to evaluate multiple employees with the same performance document.

As a manager, you require the duty role Mass Evaluate Performance Documents by Manager (ORA\_HRA\_MASS\_EVALUATE\_PERFORMANCE\_DOCUMENTS\_BY\_MANAGER) to access All-in-One Evaluations. If there's only one performance document for the review period then you'll see that performance document defaulted.

## Evaluate Competencies

Competency evaluation topics display all the competencies that exist across all the employees' performance documents.

As a manager, you can't evaluate competencies that aren't applicable to a specific employee. Configure the Maximum Number of Items for Mass Evaluations (ORA\_HRA\_MASS\_EVALUATION\_ITEM\_LIMIT) profile option to determine the combined maximum number of competencies across all employee performance documents that can display in a competency evaluation topic. Setting the profile option to a lower number improves application performance. If the combined number of competencies in a performance document is higher than the number allowed, then you won't see individual competencies in All-in-One Evaluations. Instead, they can select the count of each employee's competencies to navigate to their individual performance documents to provide ratings and comments. Managers can still enter competency section ratings and comments directly in All-in-One Evaluations or in the individual performance documents.

**Note:** If more than one competency section is configured, each section displays as a separate evaluation topic in All-in-One Evaluations.

You can perform these actions during the manager evaluation task on the same page:

- Provide a proficiency level or performance rating for employees' competencies
- Provide an evaluation comment for employees' competencies
- View the number of items the manager has rated and commented for competency
- View employees' self-evaluated proficiency levels or performance ratings for their competencies
- View the employee's self-section rating
- View the employee's self-section comment
- View employees' self-evaluated comments for their competencies

To perform additional actions, select the employee's name from All-in-One Evaluations to navigate to individual performance documents.

You can't edit target performance ratings for competencies in All-in-One Evaluations. You can only set or update target performance ratings for new competencies that you or an employee add directly in the individual performance documents during the Set Goals and Manager Evaluation tasks. You can't edit target proficiency levels. Target proficiencies are set by HR as the minimum proficiency level on a competency for a job profile, or directly in the performance template.

## Evaluate Questionnaires

You can perform these actions during the manager evaluation task on the same page:

- Complete a manager questionnaire
- View employee questionnaires
- Calculate total scores if the performance documents are configured to include a questionnaire that has scoring enabled.

Managers can select an employee's name to navigate to the employee's performance document and focus on that performance document.

## Evaluate Overall Summary

The overall summary topic allows the manager to provide overall ratings and comments across all employee performance documents.

You can perform these actions during the manager evaluation task on the same page:

- Provide an overall summary rating
- Provide an overall summary comment
- View the employee's overall self-summary rating

## Evaluate Performance Goals and Development Goals

Performance and development goals are usually individual to an employee; therefore, goals aren't displayed directly in the All-in-One Evaluations page. You can select the count of each employee's goals to navigate to their individual performance documents to provide ratings and comments and see more details.

You can enter section ratings and comments directly in All-in-One Evaluations or in the individual performance documents. If a Performance goal plan or Development goal plan is pending approval, manager's can't rate and comment in those plans until the approval process completes.

You can perform these actions on the All-in-One Evaluations table during the manager evaluation task:

- Provide a section performance rating
- Provide a section performance comment
- View the employee self-section rating
- View the employee self-section comment

## Submit Manager All-in-One Evaluations and Calculate Ratings

As a manager if you don't complete all your evaluations at the same time, you can individually select the performance documents you want to submit. If you don't select any row, then all performance documents are submitted for evaluation.

If submission isn't completed for performance documents because they have warnings or errors that need reviewing, then you can review these on the All-in-One Evaluations page. For performance documents with warnings, you can choose to edit the evaluations again or ignore the warning and complete the submission. For performance documents with errors, you must fix these, and then submit the manager evaluations again. If concurrent evaluations are configured where the employee self-evaluation needs to be completed first, you can provide your evaluation but can only submit it when the employee self-evaluation is complete.

You can use Calculate Ratings to recalculate the calculated ratings displayed in the performance document. Additionally, you can select Bypass Employee Self-Evaluation if the employee self-evaluation task is ready or in-progress. You can use Return Self-Evaluation to Employee if the self-evaluation task is complete. If a guided journey is configured, then managers can use that to complete tasks on the page.

The Configure the Maximum Number of Documents Allowed to Process in Real Time for All-in-One Evaluations (ORA\_HRA\_MAX\_DOCUMENT\_SUBMIT\_REAL\_TIME) profile option determines the maximum number of performance documents each manager is allowed to submit or calculate ratings for a real-time process. Setting the profile option to a lower number improves the time for processing.

If the number of performance documents is above the number allowed for real-time processing, then the manager evaluations are submitted or ratings calculated when the scheduled All-in-One Evaluations for Performance Documents process runs. Schedule this process daily or more frequently to allow managers to see the results of submitted manager evaluations or rating calculations.

## Substitute Performance Document Evaluators in All-in-One Evaluations

Substitute performance document evaluators can complete multiple manager evaluations on behalf of managers using All-in-One Evaluations.

Select the manager that you want to evaluate on behalf of from the Evaluate as menu to view performance documents for the employees you have access to.

- You need the role Mass Evaluate Performance Documents by Manager (ORA\_HRA\_MASS\_EVALUATE\_PERFORMANCE\_DOCUMENTS\_BY\_MANAGER) to access All-in-One Evaluations.
- You need the role Evaluate Performance Document as Manager (ORA\_HRA\_EVALUATE\_PERFORMANCE\_DOCUMENT\_AS\_MANAGER) to act as a substitute performance document evaluator.

As performance documents have named managers HCM Delegation can't be used to perform the manager tasks for a performance document. Performance documents can either be transferred to a new manager or a substitute evaluator can perform the manager tasks for employees performance documents they have access to.

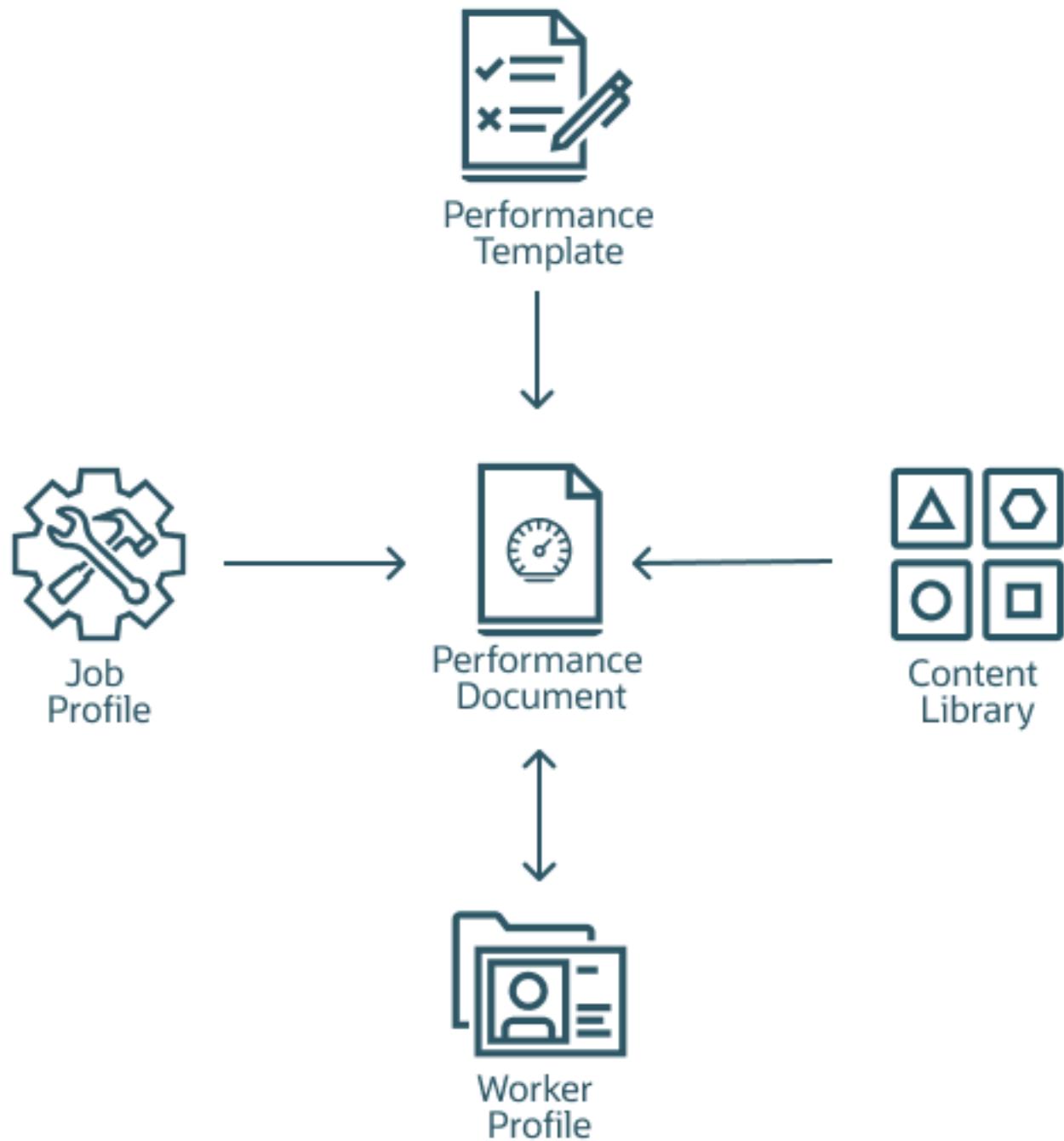
You should note that although substitute performance document evaluators such as an administrator or HR specialist can enter evaluation ratings and comments on behalf of the manager, it is still the manager's name that displays in the performance document.

If you have audit enabled, you can see details of the user who entered the ratings and comments on behalf of the manager. If you want a different manager to be recorded as performing the evaluation, you can transfer the document to a new manager.

## 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 employees 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.
- 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.

## 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 run 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 that were added to job, position, or organization profiles to performance documents that use those profiles.

The process only updates in-progress performance documents. In-progress performance documents indicate when any of the evaluation tasks; worker self-evaluation, manager evaluation, and manage participant feedback are incomplete.

Also, the process adds only new competencies to performance documents. If performance documents include competencies that are no longer relevant, then you need to manually remove them. Competencies that are end dated in Profiles aren't automatically removed from performance documents.

## 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

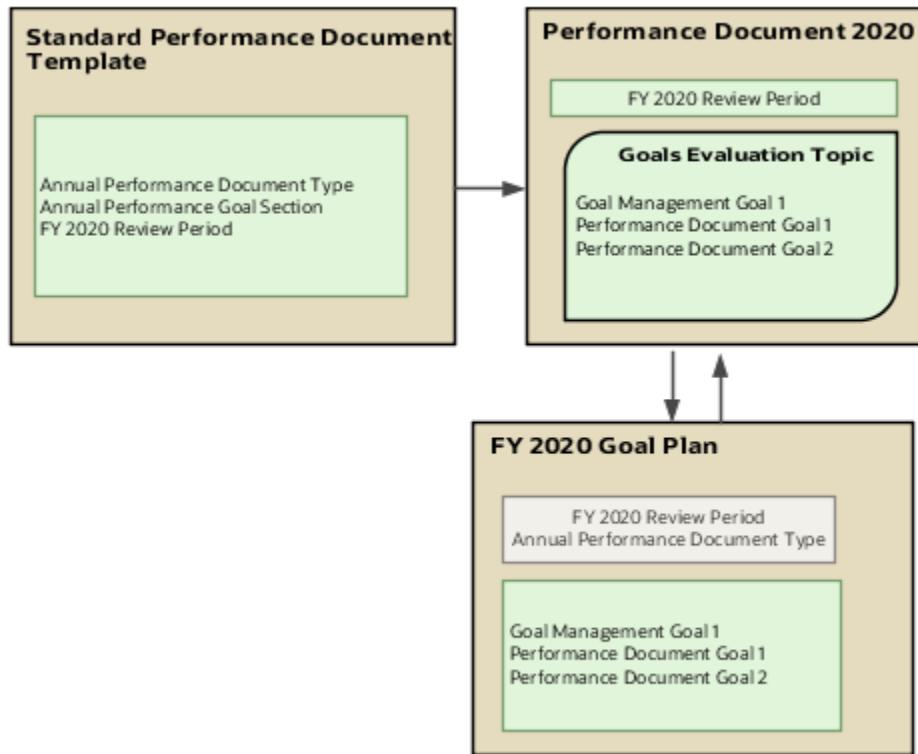
Use the Performance Goals section type in the performance template to create a section for performance goals. For the Performance Goals section, you can use rating models to rate employees and use calculation rules to calculate an overall goal section rating. Remember to enable ratings and comments so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

## Who Can Remove Goals Contained in a Performance Document

The role of a person who added a performance or development goal to a performance document, and where they added it, determine who can remove the goal, and from where.

The following table describes scenarios in which either a performance or development goal is added to a performance document and who can remove that goal from the performance document, and the goal management, and career development business processes.

Scenario	Description (who can remove the goal)
The manager rates a worker on the goal in the worker's performance document.	The worker can't remove the goal from the performance document.
The worker added the goal to the performance document, or his goal list in either the goal management or career development business processes.	The worker can remove the goal from the performance document and also delete it from the worker's goals lists in the goal management and career development business processes. Removing the goal from the performance document doesn't remove it automatically from the worker's goal lists.  The manager can remove the goal from the performance document but can't delete it from the worker's goals lists in either the goal management or career development business processes.
The worker's manager added the goal to the performance document or the worker's goal lists in the goal management or career development business processes	The worker can't remove the goal from the performance document.  The manager can remove the goal from the performance document and also delete it from the worker's goals list in the goal management or career development business processes. Removing the goal from the performance document doesn't remove it automatically from the worker's goal lists.
The HR specialist added the goal as a specific content item to a performance template and didn't mark it as required in the performance template.	The worker can't remove the goal from the performance document.  The manager can remove the goal from the performance document and also delete it from the worker's goals lists in the goal management or career development business processes. Removing the goal from the performance document doesn't remove it automatically from the worker's goal lists.
The HR specialist added the goal as a specific content item to a performance template and marked it as required in the performance template.	Neither the manager nor the worker can remove the goal from the performance document.
Someone other than the worker's manager added the goal to the worker's goal lists in the goal management or career development business processes and included the goal in the worker's performance document based on performance template settings.	Neither the manager nor the worker can remove the goal from the performance document.

## How Writing Assistant Works with Performance Documents

Managers use the Writing Assistant feature to assist them 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.

Using Writing Assistant, managers can select a proficiency level for a competency and view suggested comments based on the selected proficiency level, or for the competency as a whole. They can then copy and edit the comments.

## Accessing Writing Assistant on the Performance Document

You access Writing Assistant in the performance document. In the Evaluation Topics section for Competencies, click the **Evaluate** button. Click the **Show Additional Info** link. For Feedback Suggestions or Development Tips, click the **Paste to Comments** button.

This table shows the available suggestion types, the source of the suggestions, and examples of how to use them.

Suggestion Type	Source	Use Case Example
Feedback Suggestions	Associated with the competency proficiency level selected by the manager.	The competency you are rating has five rating levels: 1 through 5. You select level 3 and access the Writing Assistant. The feedback suggestion is the one associated with level 3.
Development Tips	Associated with the competency.	You want to help the worker increase proficiency for the competency and select the development tip for the competency. These are also available when only comments or performance ratings are used instead of rating proficiency levels.

You can view the available suggestions and select one or more to paste in the Manager Comments section of the performance document. After copying and pasting suggestions, you can edit them as required.

## Using only Comments in a Competencies Section

If the competencies section is configured to use comments only and not proficiency level ratings, for individual content items, only development tips are available. Feedback suggestions aren't available because they rely on proficiency levels.

# 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.

## 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](#)

## Substitute Performance Document Evaluators

Substitute performance document evaluators can complete manager evaluations on behalf of managers.

To enable a user to substitute as performance document evaluator, you must provide the following security access

1. Ensure the employee for whom the evaluation is being performed is in the user's security profile.
2. Grant these privileges to access the employee's spotlight page:
  - View Performance Summary Data (HRA\_VIEW\_PERFORMANCE\_SUMMARY\_PRIV)
  - View Check-In Document Data (HRA\_VIEW\_CHECK\_IN\_DOCUMENT\_PRIV)
  - Manage Check-In Document (HRA\_MANAGE\_CHECK\_IN\_DOCUMENT\_PRIV)
3. Grant the Manage Performance Document privilege to view the performance document of which the user isn't the named performance document manager.
4. Grant the Evaluate Performance Document as Manager (ORA\_HRA\_EVALUATE\_PERFORMANCE\_DOCUMENT\_AS\_MANAGER) privilege to act as a substitute performance document evaluator.

Although substitute performance document evaluators such as an administrator, HR specialist, or Area of Responsibility (AoR) can enter evaluation ratings and comments on behalf of the manager, it is still the manager's name that displays in the performance document.

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

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

## How You Manage Performance Documents for Inactive Assignments

You may have to create or open a performance document for a worker whose assignment is either inactive due to termination or transfer, or suspended. This topic describes how and where to search, create, and open those performance documents.

### Terminated Assignments

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

- Managed by a terminated manager

- Assigned to a terminated worker

Human Resource (HR) specialists and managers can find documents for terminated assignments on the Performance Documents page under Administration. Use the **Assignment Status** field and select the Inactive check box.

HR specialists can search and create documents for terminated assignments using the Performance Documents task.

## Suspended and Inactive Assignments

HR specialists can find suspended assignments using the Performance Documents page under Administration using the Assignment Status filters. Managers and workers can find suspended assignments by using the Business Title. Remember that terminated assignments are inactive assignments.

### Related Topics

- Performance Management Profile Options

## 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.	<p>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.</p> <p>If the <b>Transfer current performance documents for which I am the manager to the new line manager</b> 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</p>	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.

Flow	Who performs this action and on whom	What happens to performance documents	Effective from date
		<p>for are also transferred to the new manager.</p> <p>For HR, the setting doesn't apply because they are unlikely to be the performance document manager for any of the employees' performance documents.</p>	
Mass Legal Employer Change	Only HR specialists can perform this action on multiple employees at the same time	<p>The task copies only the performance goals and documents associated with the primary assignment to the new assignment created by the global transfer.</p> <p>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.</p> <p>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.</p>	<p>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 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.</p> <p>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.</p>

*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.

# Autosave Performance Documents

While you update performance documents, they automatically save at a defined interval to preserve your work. Autosaving preserves your ratings and comments, and questionnaire responses.

## When Autosaving Takes Effect

When the autosave period is shorter than the session timeout, the performance document autosaves before the timeout so no Performance data is lost.

## Autosaving Interval

The application autosaves at the interval specified in the Performance Autosave Interval profile option. The profile option value indicates in minutes how frequently autosave is performed. The autosave default is 10 minutes. Implementors or HR specialists can increase or decrease the frequency using the Performance Autosave Interval profile option. To edit profile options, Implementors or HR specialists can search for the Manage Administrator Profile Values task in the Setup and Maintenance work area and select Performance Management as the application.

## Last Saved Time Stamp

A last saved time stamp appears on the performance document when you save the document manually, or it autosaves.

*Related Topics*

- [Performance Management Profile Options](#)

## Reassign Performance Documents for Terminated Managers

When a manager is terminated or inactive, you can automatically transfer the performance documents owned by the manager, to other managers.

Use the Reassign Performance Documents with Terminated Managers process. This helps to complete the evaluation without a manual transfer of each performance document. Here's a list of key features about this process:

- It can reassign performance documents to the employee's new line manager (if one exists).
- It can reassign performance documents to the manager of the terminated performance document manager (if active).
- It can be run for specific review periods if the focus is only on current performance documents.
- It can be run for all review periods.

Here's what you do:

1. Click the Scheduled Processes work area in the Navigator.
2. Click Schedule New Process.
3. Enter or select Reassign Performance Documents with Terminated Managers in the Name field.
4. Click OK.
5. Enter your parameters and click Submit.

**Note:** If using this process it's recommended to run it daily to automatically update performance document managers.

*Related Topics*

- [Submit Scheduled Processes and Process Sets](#)

## 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	<p>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.</p> <p>Select the <b>Approve</b> or <b>Reject</b> buttons on the performance document. No other approval process actions are available on the performance document.</p>
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](#)

## FAQs for Evaluate Worker Performance

### Why does the performance document contain competencies and goals before I have added any?

Your manager may have added competencies and performance and development goals directly to your performance document or imported them from other performance documents.

Your manager may also have updated competencies from existing model profile competencies, or goals from your list of goals on your My Goals or My Career Development pages, if either is available. When the document is created, it may also include model profile competencies, or other default competencies and goals if the template used to create the document is configured to include them. You can open performance documents from the Performance work area.

### Can I add items to, or remove items from, the performance document once the document content is shared?

Yes. Once the performance document content is shared when setting goals, managers and workers can add competencies and goals to, or remove them from, the performance document.

Participants can't add, remove, or edit content. You can open performance documents from Performance work area.

### What's the difference between sharing and submitting performance document content?

Sharing content while setting goals in the performance document makes it available for further review by either the manager or worker. Submitting the content makes it available to use in the performance evaluation.

After submitting the set goals task, neither the manager or worker can add or delete content as part of this task. You can open performance documents to share and submit them from the Performance pages.

## What happens if I copy (import) goals and competencies in a performance document?

You're prompted to select either a past performance document or another current one from which to copy content to the document you're working on.

The content that you copy (formerly called import) can include competencies, performance goals, and development goals, depending on how the performance document was configured. Ratings and comments in the document from which you're importing content aren't copied.

You can copy performance documents on the Set Goals, Worker Self-Evaluation, and Manager Evaluation of Workers pages. You open performance documents from the Performance pages.

## What happens if I update goals and competencies in a performance document?

The application updates the performance document to reflect any changes in other content sources since the document was created. Depending on how the performance document was configured, the updated content can include competencies, performance goals, and development goals.

Competency sections are either updated from model profiles they're associated with or from the workers' talent profile. Performance goals are updated from the worker's goal list on the My Goals page if it's available, and the goal plan containing the goals is specified to be included in the performance documents. Development goals are updated from the My Career Development page if the career development business process is available and the goal dates overlap any portion of the performance document dates.

When you update content, no goals or competencies are removed automatically from the performance document. You can only remove those manually.

You can update performance documents on the Set Goals, Worker Self-Evaluation, and Manager Evaluation of Workers pages. You can open performance documents from the Performance pages.

## Why can't I update the performance document content?

Because someone else is editing it. The document is locked when one user is updating the content. When the person working on the performance document shares it, then you can access and update it.

You can share the document multiple times before submitting it to perform the evaluation and provide ratings. You can open performance documents from the Performance work area.

## Why can't I see my worker's comments and ratings?

You can see the comments and ratings a worker provides in the performance document after the worker completes the self-evaluation and submits the performance document.

You can open performance documents from the Performance pages.

## Why did some of the performance ratings I provided change?

Performance document ratings may change if the compensation management business process is configured to allow Compensation managers to update performance ratings for the overall rating, or Performance Goals or Profile Content sections.

You can change ratings only if the document isn't completed. You can override ratings updated from the compensation management business process in the performance document. The ratings that appear in the performance document when you submit it are the final performance ratings for the document.

## What happens if I bypass the worker self-evaluation?

You can continue to the next task in the performance document, such as performing the manager evaluation.

The worker can no longer update the performance document, including adding additional content, ratings, or comments.

The task status changes to **Bypassed**. The **Bypass Task** button appears on the manager view of the Worker Self-Evaluation page.

## How can I add content to a performance document after the worker submits it?

During the Manager Evaluation of Workers task, the manager can add content items to the performance document and click Return to Worker.

They can use the Update Goals or Update Competencies actions if they meet the configuration criteria of the performance template which the performance document uses.

To reopen the performance document for the worker after adding items to it, the manager can also select the Return to Worker option from the Actions icon on the Evaluate Performance page from the My Team pages. After adding content items, the manager can ask the human resource (HR) specialist to update the performance document back to an earlier task using the Performance Documents administration page.

The status of the Worker Self-Evaluation task changes to **In progress**. The worker can provide ratings and comments for the additional content items and the evaluation continues from that point.

## What happens if I don't request feedback from the minimum number of participants?

The evaluation isn't affected and the performance evaluation can be completed. The minimum number of participants is a guideline and isn't enforced by the application.

You request feedback from the Manage Participant Feedback page in a performance document. You open performance documents from the Performance pages.

## What happens if I change the participant role?

The participant can still access the performance document to provide ratings. For questionnaires, the participant can use a different questionnaire, with different questions, than the one associated with the previous selected participant role.

Questionnaires are assigned to roles, not individuals. You can only change the role if the participant hasn't started providing feedback. You manage participant feedback on the Manage Participant Feedback page in a performance document. You open performance documents from the Performance work area.

## What happens if I add a question to a questionnaire for a participant?

The question that you create is only added to the questionnaires for the participants you select, and only for this specific feedback request.

The question isn't added to the questionnaire template or any other use of this questionnaire for other feedback requests to the participant about other workers.

You add questions to questionnaires on the Manage Participant Feedback page in a performance document. You open performance documents from the Performance work area.

## Why can't I remove a participant?

You can't remove participants if their feedback is in progress or completed. Only your HR specialist can remove participants and their feedback if the participant has started it.

You manage participants on the Manage Participant Feedback page in a performance document. You open performance documents from the Performance work area.

## How can I create a performance document for the terminated assignment of a worker?

Use the Performance Documents administration page under My Client Groups, click the Create Document button and search for the worker for whom you want to create a performance document.

Use the filters to help you find the terminated assignment. Select the name of the worker and then Create from the Actions menu. The application creates the document and makes it available for the manager and worker to perform the evaluation.

An assignment must be eligible for the performance document before it's terminated in order to create it. The Eligibility Batch Process doesn't process terminated assignments, so you can't create performance documents for a terminated assignment if it's not eligible.

## Can I change the date of a performance document?

Yes, you can change the date for a regular performance document or an anytime document.

Workers and managers can change the date of a performance document after it has been created (and while the contents of the document are editable) for the set goals, worker self-evaluation, and manager evaluation tasks. HR specialists can only change the dates when creating a performance document for a worker, not after it is created.

## Why can't I see some information in the printed performance document?

You can't see some info in the printed performance document for a few different reasons.

- The info isn't in the online performance document. The printed performance document displays the same info that's currently available in the online performance document. For example, the employee printed the performance document but didn't find the manager's ratings and comments. If the employee can't view the info in the online performance document either, then the manager hasn't shared them yet.
- In the performance document questionnaire, if question responses or images are provided as attachments, the attachments aren't printed.
- Information may also not display in the printed performance document if the templates for the printed performance document are personalized to hide certain attributes.

## 2 Feedback

### Overview of Participant Feedback in Performance Documents

Participant feedback enables people other than the worker, or the worker's manager, to provide ratings and comments on worker overall performance, competencies, and performance and development goals, and respond to a questionnaire.

Using the Manage Participant Feedback page, HR specialists, managers, and employees can request feedback, track feedback status, and view received feedback.

The HR specialist configures the performance template to determine the availability of participant feedback and the roles that can perform the feedback-related tasks for the performance document.

- Managers can manage participant feedback for any person whose performance document they're managing, such as direct reports or employees.
- A worker manages participant feedback only for participants in their own performance documents.
- HR specialists can manage participant feedback for the workers they manage.

Depending on the configuration, HR specialists, managers and workers can:

- Add and remove participants
- Select roles for the participants
- Add questions to the questionnaire
- Send participant requests
- Lock participant feedback (HR specialists and managers only)
- View participant feedback
- Reopen submitted feedback (also available for participants)

The following subtopics describe the sections on the Manage Participant Feedback page.

### View the Manage Participant Feedback Page

You can view the Manage Participant Feedback page using different navigation paths, depending on your role.

1. If you're a HR Specialist, follow these steps:
  - a. Search for an employee using the Search bar on the global header and view the employee's spotlight page.
  - b. Click **Show More** on the left navigation pane, and select **Performance**.
  - c. Click the **Actions** menu next to the performance document in the Performance Documents section, and then select **Manage Participant Feedback**.
2. If you're a manager, follow these steps:
  - a. Go to **My Team > Performance**. The Evaluate Performance page appears.
  - b. Select a review period to view performance documents for that period.
  - c. Click the **Actions** menu next to the employee name, and then select **Manage Participant Feedback**.

**3. If you're an employee, follow these steps:**

- a.** Go to **Me > Career and Performance > Performance**. Or, select **Personal Details** under **Quick Actions**, click your profile picture to open the **More Information** menu and select **Performance**.
- b.** Select a review period to view performance documents for that period.
- c.** Click the **Actions** menu next to the performance document in the Performance Documents section, and select **Manage Participant Feedback**.

**Results:**

In all these navigation steps, you can view the Manage Participant Feedback page by clicking the **<Number> of participants** link, which, if available, appears under the manager's name next to the performance document.

*Related Topics*

- [How You Configure Performance Pages Using Transaction Design Studio](#)

## How You Add Participants and Roles

As a manager, HR specialist, or employee, you can add people to the list of participants to provide feedback about the employee.

You can add any number of participants to the list of participants. You can add a participant more than once for the same document, either using the same role or another role. If a minimum number is required, it's only a guideline; you can complete the task without the minimum required feedback.

You can remove participants from the list before the participants provide feedback. After the participant has saved or submitted feedback, only the HR specialist can remove the participant and feedback.

You can search for people to add as participants, or choose them from the following categories, if you enable the categories using Transaction Design Studio:

- Suggestions (based on who you previously selected as participants for the worker)
- Peers
- Direct Reports
- Matrix Managers

When you add a participant, you need to select a role for them. If there's only one participant role available, then it becomes the default automatically. The role determines which sections of the performance document the participants use to provide feedback. You can change the participant role if the participant hasn't started and saved or submitted the feedback.

## Add Questions to the Questionnaire

You can add questions that require text responses to questionnaires for participants, if permitted to do so.

### Before you start

You can add questions for individual participants, or all participants using a particular questionnaire. The questions appear only on the questionnaires for the participants selected for the current feedback request. They don't appear on other versions of the questionnaire used by these or any other participants.

You add a question as follows:

#### Here's what to do

- Select a participant name on the Manage Participant Feedback page, and select the **Add Question option in the Actions menu**. Then, you can select the participants using that questionnaire for whom you want to add the question.

#### What to do next

You can only add questions to a questionnaire when a participant hasn't started providing feedback.

## Lock Participant Feedback Requests

Managers and HR specialists can lock participant feedback requests to prevent participants from accessing the performance document to start or continue providing feedback.

Managers can lock participant feedback requests, for example, when they have sufficient feedback to complete their evaluations of workers, or they have more participants than required. Once locked, the feedback request can't be unlocked.

When you lock participant feedback requests, the status for the task to provide feedback changes to Locked out for that participant. The worker name is removed from the Participant Feedback Requests for Others region in the Performance pages. If the manager, worker, or HR specialist decides to gather more feedback from the participant, then they must issue another request for feedback to the participant.

## Provide or Revise Participant Feedback

You can provide or revise participant feedback that you've given.

#### Before you start

As a participant, when you receive a request to provide participant feedback, it appears as a notification on the global header. HR specialists or managers may also request you to revise the feedback you gave. These requests also appear as notifications. To view these requests, you can also navigate to your Performance page, select a review period, and view the request under the Participant Feedback for Others region.

You provide or revise the feedback for one or more sections in a performance document, depending on how it's configured.

Here's an example of how you do it:

#### Here's what to do

1. Click the **Notifications** link.
2. Click the **Provide Participant Feedback** link in the message.
3. Click **Edit** in the <Employee> Overall Summary section to provide your overall rating and comments.
4. Click **Evaluate** in the Development Goals section.
5. Provide your rating and enter your comments for each goal. Scroll down to the page to provide your overall rating and comments for all development goals, and click **Save and Close**.

6. Click **Evaluate** in the Competencies section. Provide your rating for the employee's proficiency level and performance, and enter your comments for each competency. Scroll down to the page to provide your overall rating and comments for all competencies, and click **Save and Close**.
7. Click **Evaluate** against the Questionnaire section and provide your responses to the performance-related questions included in the performance document.
8. Click **Submit** to complete the participant feedback process.

#### What to do next

**Note:** When you're done, you can submit it immediately, or save and submit it later.

## Reopen Participant Feedback

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

When HR specialists reopen participant feedback, they have to specify the due date by when the participants must provide the feedback. They can also optionally select a reason for reopening the feedback.

**Note:** Organizations can add their own reasons to the default list by using the ORA\_HRA\_MASS\_UPD\_TASK\_REASON profile option in the **Performance Lookups** task in the Setup and Maintenance work area.

The HR administrator can select a check box for workers, managers, HR specialists, and participants to enable them to reopen submitted feedback in the Participant Feedback region in the Process Flow page in the Setup Maintenance area. A few things to remember:

- You can only reopen the submitted feedback if the Manage Participant Feedback task isn't complete.
- You can't enable the reopen options in a process flow that's already 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 be reopened before the task is complete.

## Send Participant Requests

After adding participants to the list and selecting the roles, you must send a request to inform the participants that you're asking them to provide feedback.

You can send the request immediately after selecting the participants, or send the request later.

Managers can always send a request to participants. Employees can also send requests to participants, if allowed. If the employee can't send a request, then they can use the Notify action to let the manager know they selected new participants for the manager to send requests to.

1. To send the request immediately, click **Send Request** in the Add Participants page.

2. To send the request later, find the individual participant from the list in the Manage Participant Feedback page, and click **Send Request** using the **Actions** menu.

**Note:** Using HCM Data Loader, HR specialists can add participants and send requests to them to provide feedback in performance documents for multiple employees at the same time.

#### Results:

Participants receive a notification about the request, if notifications are enabled. Clicking the link in the notification takes them to the employee's performance document so they can start providing feedback. Alternatively, they can also go to their Performance page and select a review period to view the request under the Participant Feedback for Others region. They can then select the performance document link and begin providing feedback.

## How You View Participant Feedback

You can view feedback provided by participants, if permitted to do so.

Depending on the configuration of the performance document, you can view ratings, comments, or both, for overall performance, competencies, and performance and development goals, along with questionnaire responses.

You can view participant feedback when the feedback is in Completed status.

When viewing the list of participants, you can sort them by these categories:

- Participant name
- Person who selected the participant
- Feedback status

The Feedback Status sort option appears for these roles:

- The worker, if you enable the **Worker can track participant feedback status** option in the process flow
- The performance document manager, if you enable the **Manager can track participants** option in the process flow
- Managers in the employee's manager hierarchy
- HR specialists

## View Participant Feedback

You can view participant feedback when the feedback is in Completed status.

Follow these steps to view participant feedback:

1. Go to the Manage Participant Feedback page to view the list of participants.
2. Click the **View Feedback** button next to the participant's name.

**Note:** Scroll down to view the Participant Requirement section. Expand it to see the overall status of the participant roles who responded and to know if they're mandatory.

3. Click the **View** button in the Evaluation Topics section to see the participant feedback provided for overall summary, goals, competencies, or questionnaires.
4. To print all or selected sections of the participant feedback to a PDF or HTML format, click **Print** on the page header.

You can also view the participants' ratings and comments by opening a performance document. In any section of the performance document that participants have evaluated, click the **Show Additional Info** link under an item or the summary to view these details. Here, you also see the average feedback rating of all the participants who provided ratings. The number in brackets is the number of participants who provided ratings, and not those who provided comments, but no ratings.

## Requested Feedback

### Requested Feedback

While you request Participant Feedback for a specific performance document at the end of the year, you can request additional feedback for yourself or for your employees at any time of the year using the Requested Feedback feature.

You can request feedback on your performance based on specific questions included in a questionnaire rather than on individual goals and competencies available in a performance document.

When requesting for feedback using this feature, you can choose any questionnaire to elicit responses from feedback providers. This questionnaire can be different from the one used in the performance document. At the time of requesting feedback, you can also add additional questions, if the questionnaire you choose enables adding additional questions.

You can configure Requested Feedback to appear in your performance document, in addition to Participant Feedback. For more information, see Related Topics on how to use the **Performance Templates** administration task for this purpose.

**Note:** If you can't create a feedback request, contact your administrator and verify your privileges. Additionally, ensure that you've configured at least one active feedback template.

### Create a Feedback Request

You create a feedback request from the Feedback spotlight page. You can access this page in different ways depending on your role and need.

**Note:** You need to configure at least one active feedback template before you can create a feedback request.

To request feedback for yourself, use one of these options:

- Go to **Me** > **Quick Actions** > **Show More** > **Career and Performance** > **Request Feedback**, and click **Add**.
- Go to **Me** > **Career and Performance** > **Feedback** tile, and click **Add** from the Feedback Requests About Me section.

If you're a manager requesting feedback for your team members, use one of these options:

- Go to **My Team** > **My Team** or **Performance Overview** or **Career Overview** tile and select an employee. On the left navigation pane, click **Show More** > **Feedback**, and then click **Add** from the Feedback Requests About <Employee> section.

- Go to **My Team > Quick Actions > Show More > Career and Performance > Request Feedback** and select an employee.

If you're an HR specialist requesting feedback for anyone in the organization, use one of these options:

- Search for an employee from the global header and view the employee's spotlight page. Click **Show More** on the left navigation pane and click **Feedback**. Then, click **Add** from the Feedback Requests About [Employee] section.
- Go to **My Client Groups > Quick Actions > Show More > Talent > Request Feedback** and select an employee.

Next, create a feedback request and send it to the feedback providers:

1. In the Who do you want to ask section, type the feedback provider's name and then select the name from the list that appears. You can add more feedback providers from this list.
2. To request feedback from the feedback recipient's peers or direct reports, click **Select Peers** or **Select Direct Reports**.

**Note:** The **Select Direct Reports** button is available only if the feedback recipient is a manager with direct reports.

3. Select some or all names from the list that appears.

**Note:** If you select the same feedback provider by searching for them, selecting them from peers, and selecting them from direct reports, only one feedback request is created for that person and not three.

4. You can share the feedback response depending on your role:

- If you're a manager requesting feedback about a worker, select the **Share feedback with <person\_name>** check box to share the feedback with them.
- If you're requesting feedback for yourself, select the **Share feedback with <person\_name>** check box to share the feedback with your manager.
- If you're requesting feedback for yourself, select the **Share feedback with me** check box to view the feedback on your Feedback spotlight page.

**Note:** These check boxes are selected by default. If you don't want to share the feedback, clear the check box. When the feedback is shared, notifications are sent to the feedback providers and recipients.

5. Click **Continue**.
6. In the What do you want to ask section, select a questionnaire from the list. You can preview the questions included in the questionnaire.
7. You can also add one or more specific questions in the Additional Questions section, if your questionnaire is configured to allow additional questions.
8. Click **Continue**.
9. In the When do you need it section, specify the date by when you want the feedback.
10. You can include a message along with the feedback request.
11. Click **Submit**.

**Tip:** You can go to the earlier sections and modify the details, if required, before submitting the feedback request.

The application sends notifications to all persons associated with the feedback (feedback providers, feedback recipients, and manager), if notifications are enabled and the feedback is chosen to be shared. When feedback providers respond to the questionnaire and submit the feedback, the status of the feedback request changes to **Completed**. You can view the feedback only after the feedback provider submits it.

The **Select Peers** and **Select Direct Reports** buttons are hidden by default. Your administrator can make them visible using Transaction Design Studio. They're available under the Feedback action and the Who do you want to ask region in the Page Attributes section. The **Share feedback with me** check box is visible by default. Your administrator can choose to hide it using the same Page Attributes section in Transaction Design Studio.

The HR specialist can request the feedback provider to revise the feedback, if required. It's possible to request for a revision only when the feedback status is **Completed**.

#### Related Topics

- [Feedback Templates](#)

## View or Print Requested Feedback

You can view or print feedback responses that you received for yourself or for your reports, when the feedback is in **Completed** status.

### Feedback Received for You

The Feedback Requests About Me section on the Feedback page lists the feedback you received from your manager or other feedback providers. This includes feedback that you requested for yourself as well as feedback that your manager requested for you from others.

To view this section, use one of these navigation paths:

- Go to **Me > Career and Performance > Feedback**
- Go to **Me > Quick Actions > Career and Performance > Feedback**

You can filter the feedback list based on the status (new, in-progress, or completed) or feedback period.

For each feedback, you can view these details:

- Name of the person from whom feedback is requested
- Feedback status and date
- Questionnaire used for the feedback
- Name of the person who requested the feedback
- Date of the request

To view or print the feedback responses, click the **Actions** menu and select the corresponding option.

When you print the feedback, you can view additional comments, if any, that are added to single-choice and multiple-choice questions and date responses.

For any feedback that's in **Completed** status, you can thank the feedback provider by selecting **Send Thank You** from the Actions menu. When you send the thank you note, the feedback provider receives an email notification about it. They can also view the thank you note from their worklist.

### Feedback Received for Your Reports

You can view or print feedback received for your direct as well as indirect reports. You can also thank the feedback provider for feedback sent to your direct or indirect reports.

To view your reports' Feedback page, go to **My Team > Quick Actions > Show More > Career and Performance > Feedback** and select a report's name.

The Feedback Requests about <Employee Name> section displays the feedback you gave to your reports as well as feedback you received for your reports from other feedback providers.

**Note:** If an employee is terminated after you requested feedback, then you won't see the feedback request anymore on this page.

For each feedback, you can view these details:

- Name of the person who gave the feedback
- Feedback status and date
- Questionnaire used for the feedback
- Name of the person who requested the feedback
- Date of the request

When a feedback is in **Completed** status, you can view the feedback responses or print it. To do so, click the **Actions** menu and select the corresponding option.

When you print the feedback, you can view additional comments, if any, that are added to single-choice and multiple-choice questions and date responses.

For any feedback that's in **Completed** status, you can thank the feedback provider by selecting **Send Thank You** from the Actions menu. You can thank the feedback provider multiple times for the same feedback. Any others (including HR specialists) who can view the feedback can also thank the feedback provider multiple times for the same feedback. When you send the thank you note, the feedback provider receives an email notification about it. They can also view the thank you note from their worklist.

**Note:**

- The thank you feature is available only if the notification templates, Worker thanks feedback participant and Manager/HR thanks feedback participant, which are a part of the **HRA Feedback is provided** alert, are enabled in Alerts Composer.
- The thank you note is not saved in the application. Therefore, it's visible only in feedback provider's email notification or worklist.

*Related Topics*

- [Configure Notifications for Check-Ins and Requested Feedback](#)

## Delete Feedback Requests

As an HR specialist, you can delete feedback requests that are sent for your reports or employees.

You can delete the requests regardless of the status of the feedback. However, you can't delete the feedback that you received for yourself from others.

1. Go to **My Client Groups > Quick Actions > Show More > Talent > Feedback** and select an employee.
2. Click the **Actions** menu in the Feedback Requests About <Employee Name> section and select **Delete**.

Using HCM Data Loader, HR specialists can delete sent feedback requests as well as received feedback responses for multiple employees at the same time.

*Related Topics*

- [Overview of HCM Data Loader](#)

## Provide Requested Feedback

When anyone in your organization requests your feedback, you get a notification about it. The notification lists the name of the person who requested the feedback, the employee for whom you need to provide feedback and the due date.

You can provide feedback in these ways:

- Use the notification that you receive.
- Check feedback requests on your Feedback page.

To provide feedback using the notification that you receive:

1. Click the **Notifications** icon on the global header and open the notification.
2. Click **Provide Feedback**.
3. Provide your feedback in the questionnaire that displays.
4. Click **Submit** to submit your feedback immediately. You can also save and submit it later.

To provide feedback by checking the feedback requests on your Feedback page:

1. Go to **Me > Career and Performance > Feedback**.
2. Expand the Feedback Requests About Others section.
3. You can identify the new requests by their **New** status. Click the feedback link.
4. Provide your feedback and click **Submit**. You can also save the feedback and submit it later.

## Send Requested Feedback for Revision

The HR specialist can ask feedback providers to revise their feedback after it's in the **Completed** status.

1. Go to **My Client Groups > Quick Actions > Show More > Talent > Feedback** and select an employee.
2. Click the **Actions** menu in the Feedback Requests About <Employee> section and select **Revise**.

**Note:** You can do this only for feedback that's in **Completed** status.

3. Enter the reason for requesting a revision, and click **Submit**.

Feedback providers can use the **Revise Feedback** notification link to modify the feedback.

## Revise Requested Feedback

You may sometimes get requests to revise the feedback that you provide. The HR specialist may want more details regarding the employee's performance and request you to revise the feedback.

You can revise the feedback in these ways:

- Use the notification that you receive.
- Edit the feedback from your Feedback page.

To revise using the notification:

1. Open the notification about the feedback revision request.
2. View the request details.
3. Click **Revise Feedback**.
4. Update the feedback that you gave, and click **Submit**.

To edit using your Feedback page:

1. Go to **Me > Career and Performance > Feedback**.
2. Expand the **Feedback Requests About Others** section.
3. The status of the completed feedback requests that you're asked to revise is now **In Progress**. Click the feedback link.
4. Revise your feedback, and click **Submit**.

## Configure Requested Feedback Reminders

As an administrator, you can now configure feedback reminders to be sent a specific number of days before the feedback is due.

You can specify this in a new scheduled process, **Send Requested Feedback Due Date Reminder**, and run the job as needed.

When you configure the process, the feedback provider receives a reminder per feedback request. Reminders are sent only if the feedback response is in the **Draft** or **Not Started** status. When an HR specialist requests the feedback to be revised, a reminder is sent to the feedback provider before the due date of the revision.

When the scheduled process isn't run periodically or fails to run, the application checks if a reminder has been sent for any feedback request that's due on the same date as the current date, or is approaching within the number of days specified in the scheduled process. A reminder is then sent, as needed.

To configure the scheduled process, follow these steps:

1. Go to **Tools > Scheduled Processes**.
2. Click **Scheduled New Process**.
3. Search for the **Send Requested Feedback Due Date Reminder** process.
4. Select the process, and click **OK**.
5. In the **Days Before Reminder for Requested Feedback Due** parameter, specify the number of days by when the reminder must be sent before the feedback due date. The default is 10. If you don't specify a value, the reminder is sent 10 days before the due date.
6. Click **Submit**.
7. Click **OK** to confirm.

### Note:

- If you configure the scheduled process and run it once, and then change the parameter value and run it again, the application won't send a second reminder for those feedback requests for which a reminder has already been sent.
- If you delete a feedback request after the reminder is sent, the feedback provider receives an error message when they click the **Provide Feedback** link on the reminder notification page.

# Anytime Feedback

## Overview of Anytime Feedback

Anytime feedback is unsolicited feedback you give to anyone in your organization. You may also receive anytime feedback from anyone in the organization. This feedback is independent of the participant feedback process in performance documents.

You can create feedback for yourself or any other person, and also edit and delete the feedback that you create. All feedback have visibility rules set for them, which determines who can see them. The person who provides the feedback decides the visibility rules.

### *Related Topics*

- [Considerations for Configuring Anytime Feedback Visibility Options](#)
- [Anytime Feedback Notifications](#)
- [Add and Hide Components Using Page Composer](#)

## View Anytime Feedback Given to You

There are many ways to view anytime feedback that you received.

Here are some ways to do it:

- Go to **Me > My Public Info**. Click **Show More** on the left navigation pane and select **Feedback**
- Go to **Me > Career and Performance > Feedback**
- Go to **Me > Quick Actions > Show More > Career and Performance > Feedback**

The Feedback Given to Me section on the Feedback page lists the feedback you received. You can filter the list based on the author of the feedback or period of feedback (for example, past six months).

For each feedback, you can view these details:

- Name of the employee who gave the feedback
- Date of the feedback
- Visibility of the feedback
- Contents of the feedback

**Note:** If the feedback is set to **Visible to Everyone** or **Visible to Managers, Peers, and [Employee]**, you can hide it by clicking the **Hide** link. The person who receives feedback and the HR specialist who has administrative oversight of the person can hide the feedback, if the content isn't appropriate. Only the person who hides the feedback can unhide it. The author can view the feedback and see that it's hidden.

You can thank the feedback provider by selecting **Send Thank You** from the Actions menu. You can thank the feedback provider multiple times for the same feedback. Any others (including HR specialists) who can view the feedback can also

thank the feedback provider multiple times for the same feedback. When you send the thank you note, the feedback provider receives an email notification about it. They can also view the thank you note from their worklist.

**Note:**

- The thank you feature is available only if the notification template **Worker Thanks Anytime Feedback Provider**, which is a part of the **Anytime Feedback Provided** alert, is enabled in Alerts Composer. Even if the feedback notification in Talent Notifications is disabled, you can still use this feature as long as the Anytime Feedback Provided alert is enabled.
- The thank you note is not saved in the application. Therefore, it's visible only in feedback provider's email notification or worklist.

*Related Topics*

- [Overview](#)
- [Anytime Feedback Notifications](#)

## View Anytime Feedback Given to Others

There are many ways you can view anytime feedback that you gave to others.

Here are some ways to do it:

- Go to **Me > My Public Info**. Click **Show More** on the left navigation pane and select **Feedback**.
- Go to **Me > Career and Performance > Feedback**
- Go to **Me > Quick Actions > Show More > Career and Performance > Feedback**

On the Feedback page that's displayed, you can filter the feedback list based on the recipient's name or feedback period.

For each feedback, you can view these details:

- Recipient's name
- Date of the feedback
- Visibility of the feedback
- Contents of the feedback

## View Anytime Feedback Received for Your Employees

As a manager or HR specialist, there are many ways you can view anytime feedback received for your direct and indirect reports, or the employees in your organization.

However, you can view this feedback only if the feedback visibility is set to **Everyone, Managers Only, Managers, peers, and [Employee], or Manager and [Employee]**.

As a manager, you can view anytime feedback in some of these ways, for example:

- Go to **My Team > My Team**. Click the **Actions** menu (shown by three dots) next to the employee's name, and select **Feedback**.

- Go to **My Team > Quick Actions > Career and Performance > Feedback**, and search for, or select the name of the employee.

As an HR specialist, you can use some of these navigation paths, for example:

- Go to **My Client Groups > Quick Actions > Show More > Talent > Feedback**. Select an employee.
- Search for an employee using the Search bar on the global header and click their name from search results. Click **Show More** from the left navigation pane and select **Feedback**.

The Feedback Given to [Employee Name] section on the Feedback page lists the anytime feedback that the employee has received. You can filter the list based on the author's name or period of feedback.

For each feedback, you can view these details:

- Name of the person who gave the feedback
- Date of the feedback
- Visibility of the feedback
- Contents of the feedback

You can thank the feedback provider by selecting **Send Thank You** from the Actions menu. You can thank the feedback provider multiple times for the same feedback. Any others who can view the feedback can also thank the feedback provider multiple times for the same feedback. When you send the thank you note, the feedback provider receives an email notification about it. They can also view the thank you note from their worklist.

**Note:**

- The thank you feature is available only if the notification template Manager/HR Thanks Anytime Feedback Provider, which is part of the **Anytime Feedback Provided** alert, is enabled in Alerts Composer. Even if the feedback notification in Talent Notifications is disabled, you can still use this feature as long as the Anytime Feedback Provided alert is enabled.
- The thank you note is not saved in the application. Therefore, it's visible only in feedback provider's email notification or worklist.

*Related Topics*

- [Overview](#)
- [Anytime Feedback Notifications](#)

## Provide Anytime Feedback as a Manager or HR Specialist

As a manager or HR specialist, you can provide anytime feedback to your report, team member, or others in your organization.

1. You can access the Feedback page in many ways. Here are some options:
  - o Go to **My Team > My Team**, and select an employee's name. Click **Show More** on the left navigation pane, and select **Feedback**.
  - o Go to **My Client Groups > Quick Actions > Show More > Talent > Feedback**.
2. In the Feedback Given to [Employee Name] section, click **Add**.
3. Select who can view your feedback and enter the feedback comments.
4. Click **Save**.

## Provide Anytime Feedback as a Worker

Workers can provide anytime feedback for other workers in several ways. For example, using Person Spotlight or Quick Actions.

### Provide Feedback Using Person Spotlight

1. Search for an employee using the Search bar on the global header, and click their name from search results.
2. Click the **More Information** menu (shown by three dots) on the person's image, and select **Feedback**. The Feedback page appears.
3. Click **Add** in the Feedback Given to [Employee Name] section.
4. Select who can view your feedback and enter the feedback comments.
5. Click **Save**.

### Providing Feedback Using Quick Actions

1. Go to **Me > Quick Actions > Show More > Career and Performance > Provide Feedback**.
2. Enter the feedback recipient's full or partial name. A list of matching names appears in the list.
3. Select the person you want to provide feedback for.  
**Note:** If you want to provide feedback for another recipient instead of the current one, click the **Remove [Recipient Name]** icon, and select another.
4. Select who can view your feedback and enter the feedback comments.
5. Click **Submit**.

You can also add anytime feedback for yourself by navigating to **Me > Career and Performance > Feedback > Feedback Given to Me**.

## Edit or Delete Anytime Feedback

Your role determines whether you can edit or delete anytime feedback and change its visibility settings. The different permissions depending on the role are described here.

### Author of the feedback

If you created an anytime feedback for yourself or for others, you can revise, delete, or change the visibility settings of the feedback.

### Manager

As a manager, you can't edit or change the visibility settings for anytime feedback that others have given to your reports. You can delete that feedback only if you're the author of the feedback, or if you also have the HR specialist role. If you need edit permissions, contact your administrator for the required privileges.

### HR Specialist

HR specialists can delete anytime feedback received by the employees in the organization, when the feedback visibility is set to **Everyone, Managers Only, Managers, peers, and [Employee]**, or **Managers and [Employee]**. They can delete any feedback that they create, regardless of the visibility setting.

They can hide public feedback that they haven't authored, if the feedback visibility is set to **Everyone** or **Managers, Peers, and [Employee]**.

HR specialists must have the Hide HCM Person Note and Delete HCM Person Note aggregate privileges in order to delete or hide the anytime feedback.

**Note:** When others provide anytime feedback for you, you can hide the feedback, if the visibility is set to **Everyone**. You can't delete or edit the feedback.

To edit or delete anytime feedback, follow these steps:

1. Go to the Feedback page.
2. In the Feedback Given to [Employee Name] section, you can optionally filter the list by the recipient's name or feedback period.
3. Click **Edit** next to the feedback that you want to revise or delete.
4. Change the visibility or edit comments, as required, and click **Save**. To delete the feedback, click **Delete**.

To edit or delete the anytime feedback you added for yourself, go to **Me > Career and Performance > Feedback > Feedback Given to Me** and follow the same procedure as above.

**Note:** Using HCM Data Loader, HR specialists can delete anytime feedback responses for multiple employees at once.

# 3 Talent Profiles

## Overview of Talent Profiles

Managers and HR specialists can maintain information within person profiles about the skills, qualifications, accomplishments, and career preferences of their workers. They can also maintain information in model profiles about the targeted skills and qualifications of the jobs and positions within the company.

Workers can manage their own careers by keeping their talent profiles current so that their skills, qualifications, accomplishments, and career preferences reflect their current performance and future career goals.

You manage a worker's talent profile on the worker's person spotlight. Depending on your role, to open a worker's person spotlight:

- Select **Directory > Directory**, search for the worker, and click the worker's name in the search results
- Select **My Team > My Team** and click the worker's name on the My Team page
- Select **My Team > Team Talent** and click the worker's name on the Team Talent page
- Select **My Team > Team Compensation** and click the worker's name on the Team Compensation page
- Open the person smart navigation window from application pages

This table lists the talent profile-related pages in person spotlight and their key features available to managers, HR specialists, and workers. Workers can open each page from the **Me** work area in the Navigator.

Pages	Features for Managers and HR Specialists	Features for Workers
Skills and Qualifications	<ul style="list-style-type: none"><li>• Use the competency gaps chart to compare the competencies of a worker to that of a job from the worker's interest list, to identify if the worker is a suitable candidate for the job or needs further training.</li><li>• Review areas of expertise and other qualifications for workers.</li></ul>	<ul style="list-style-type: none"><li>• Use the competency gaps chart to compare their competencies to that of a job from their interest list, to identify whether they are suitable for a job or to identify training needs.</li><li>• Identify areas of expertise, such as a specific software package.</li><li>• Maintain competencies, degrees, and other accomplishments.</li></ul>
Career Planning	<ul style="list-style-type: none"><li>• Add jobs or positions to the interest lists of their workers.</li><li>• Review career preference information for workers, such as job or job family of their next career move.</li><li>• Review and edit talent ratings such as performance and potential of workers, and the risk and impact of losing them.</li></ul>	<ul style="list-style-type: none"><li>• Add jobs or positions to their interest lists.</li><li>• View the suggestions list and determine whether to add any of the suggested jobs or positions to their interest list.</li><li>• Identify career preferences such as the job or job family of their next career move.</li></ul>

Managing talent-profile information in job and position profiles includes both creating the job and position profiles based on profile types, and editing the profiles when business requirements change. Job and position profiles identify the required skills, degrees, qualifications, and work requirements for each job and position within your enterprise.

**Note:** You must upgrade to enhanced talent profiles prior to HCM Cloud release 20B. In the enhanced talent profile feature, the display of the person profile and talent ratings has a more engaging and responsive interface design. The new user experience enables features to be presented on both mobile and web pages. The interfaces are simple, intuitive and are written in a more conversational language. The administration enhancements provide increased product performance and extensibility. The enhanced solution introduces content templates that represent the talent content (for example, Competencies, Certificates, Skills, and Awards) required to support the Oracle Talent Management Suite. Each content template includes unique attributes. These content templates can be used and reused to create the content sections necessary to capture talent data. The templates can be used to design both person and model talent profiles. Any relevant topics from this chapter have been updated and moved to My Oracle Support: Upgrading Oracle Fusion Profile Management (Doc ID 2421964.1).

## Enhanced Talent Profiles

Enhanced Talent Profiles provides a framework for developing and managing talent profiles that meet your industry or organizational requirements. Profiles summarize the qualifications and skills of a person or a workforce structure such as a job or position.

For more information, see [Oracle Cloud HCM Profile Management](#)

## Talent Profile Summary

The Talent Profile report provides talent-related information for a worker. This topic describes options that you can select when printing the report.

To print the report, select the Manage Talent Profile task in the Person Management work area. On the Edit Profile page, select **Actions - Print Profile**. Talent review meeting participants can also print the report for one or more workers from the Talent Review dashboard.

**Note:** If you are still using Classic Talent Profiles, you should upgrade to Enhanced Talent Profiles before release 21A. Any relevant topics from this chapter have been updated and moved to My Oracle Support: Upgrading Oracle Cloud HCM Profile Management (Doc ID 2421964.1).

## Report Sections

The Talent Profile report can contain a person summary and five configurable sections. This table describes the contents of each section.

Report Section	Contents
Experience	Current and previous assignments.
Talent Overview	Performance evaluation information for up three years. The section includes the evaluation period, overall rating, overall comments, and a bar graph comparing the performance ratings. You can also include talent ratings.

Report Section	Contents
Education and Qualifications	Competency ratings and evaluation types, degrees, licenses and certifications, honors and awards, and memberships.
Career Options and Interests	Career preference and advancement readiness information, including willingness to travel, relocate, consider part-time employment, or adopt flexible work schedules. You can also include preferred career moves and any jobs in a worker's interest list.
Goals	Development and performance goal information, such as goal names, completion dates, statuses, and descriptions. This section includes a graph of goal achievements for the worker.

## Print Formats

You can print the Talent Profile Summary in the following formats:

Print Format	Description
PDF	Includes a photograph of the worker and all selected graphs.
RTF	Includes a photograph of the worker and all selected graphs.
Microsoft Excel	Includes all selected workers in an Excel workbook, with one profile per worksheet and the worker's name as the tab label. This format doesn't include the photograph, performance history, or goals graphs.
HTML	Includes selected graphs but doesn't include the photograph.

## Compare Profiles and Find the Best Fit

### Comparing Items

Use comparison to quickly identify and evaluate differences between items. Compare any person, job, and position items. For example, you can compare a person with another person or with a job profile.

You can compare items in the Profiles work area and on the talent review dashboard.

### Selecting Items

The first item you select is the comparison base, and the items you select subsequently are secondary items. You can change the comparison base if required. The comparison displays the base item attributes, and indicates the differences between the attributes of the secondary items and the base items.

## Controlling Results

Data sets control which attributes are displayed for each item in the comparison. For example, you must select the School Education data set to display and compare a person's education details.

The information displayed in the comparison results is controlled by security access. For example, line managers can compare their direct reports and view their performance data in the comparison results. HR specialists can perform this comparison only if they have security access to the persons' performance information. You can change the effective date of comparison if you're either a line manager or an HR specialist.

## Performance Information in Comparison Results

The comparison displays the performance data of only those persons who are evaluated using the enterprise-wide designated rating model, because you can't compare persons who are evaluated using different rating models.

For each person, the comparison displays up to three performance documents. These performance documents include the latest document using the designated rating model plus the two most recent previous documents that use the same performance template as the latest document. However, the performance documents and performance periods for the persons being compared may be different. The comparison indicates the performance attributes' differences only if the performance documents are the same for the persons being compared.

## Best-Fit Analysis

The best-fit analysis includes the review of all profiles of the match type required and calculation of the overall score compared to the source profile. The overall score appears in the Overall Fit column in the results section on the Find Best Fit page.

Employees, managers, and HR specialists can use the Best-Fit feature to match and compare profiles with the selected match criteria. The Best-Fit feature finds profiles that closely match the source profile (person or job). You can associate job name to job profile type, position name to position profile type, and organization name to organization profile type.

## Best-Fit Analyses Types

The application supports the following four types of best-fit analyses:

- Person to Job: Using a person profile as the source profile, you can find the job that best fits a worker.  
Example: As a manager, use this tool to help a worker to identify job profiles for which the worker is best suited and decide the next career move.
- Person to Person: Using a person profile as the source profile, you can find the worker with skills that match that of a particular worker.

Example: Your company is planning to launch new technology. As an HR specialist, you know a worker who has the required skill to use the new technology. To assess the scope of workers who need development in this particular skill, you can select the worker's profile. You can then use the Best-Fit feature to view a list of other workers who may come close to the skill requirements.

- **Job to Job:** Using a job profile as the source profile, you can find the job profile that closely matches a job profile.

Example: As an HR specialist, you can use this tool to help locate jobs to identify areas for outplacement, training requirements, or areas of organizational strength.

- **Job to Person:** Using a job profile as the source profile, you can find the best-fit worker for a job.

Example: As an HR specialist, you can use this tool to help locate the most qualified workers for a job opening within your company.

## The Best-Fit Feature Accessibility

The roles, privileges, and application settings determine the ability for a user to perform a type of best-fit analysis. The following table shows the Best-Fit feature accessibility for the most commonly used profile types.

Role	Can Perform Person to Job Analysis?	Can Perform Person to Person Analysis?	Can Perform Job to Job Analysis?	Can Perform Job to Person Analysis?
HR specialist	Yes	Yes	Yes	Yes
Manager	Yes (Limited to direct and dotted-line reports)	Yes	No	Yes
Worker	Yes	Yes (Limited to worker's own profile)	No	No

## Filtering Best-Fit Results

By default, the best-fit analysis results show all profiles that have 90% match or greater than the selected source profile. You can further filter the results to show by overall fit or by number of profiles. The results section of the best-fit analysis also has the **Show Fit by Criteria** option. Use this option to view which content types displayed in results meet or exceed the specified criteria percentage.

## Access the Best-Fit Feature as an HR Specialist

Depending on the privileges associated with the HR specialist role, they can find either the best-fit job or person for a person profile or the best-fit job or person for a job profile.

## Finding the Best-fit Job or Person for a Person

HR specialists can find the best-fit job or person for a person by using one of the following navigation paths:

- From the Person Profiles page:
  - a. Select **Navigator > My Client Groups > Profiles**.
  - b. Click the Person Profiles tab, if not already selected, and search for the person profile.
  - c. Select the profile in the Results section.
  - d. From the Actions menu, click the corresponding link to find the best-fit job or person for the selected profile.
- From the Skills and Qualifications page:
  - a. Select **Navigator > My Client Groups > Profiles**.
  - b. Click the Person Profiles tab, if not already selected, and search for the person profile.
  - c. Click the profile in the Results section to open the Skills and Qualifications page.
  - d. In the Related Links panel, click the corresponding link to find the best-fit job or person for the selected profile.
- From the person smart navigation window:
  - a. Click the More icon for a person on application pages to open the person smart navigation window.
  - b. Select Talent Management and click the corresponding link to find the best-fit job or person for your report

## Finding the Best-fit Job or Person for a Job Profile

HR specialists can find the best-fit job or person for a job profile by using the Model Profiles page. This page includes all jobs and positions profiles associated with the job profile type.

To find the best-fit job or person for a job profile:

- From the Profiles page:
  - a. Select **My Client Groups > Profiles**.
  - b. Click the Model Profiles tab, search for the job name.
  - c. Select the profile in the Results section.
  - d. From the Actions menu, click the corresponding link to find the best-fit job or person for the selected profile.
- From the Select Candidates page when creating or editing a succession plan:
  - a. Select **Navigator > My Client Groups > Succession Plans**.
  - b. Click the Succession Plans tab, if not already selected.
  - c. Click **Create** to create a plan, or select an existing plan and click **Edit** from the tab toolbar.
  - d. Enter or edit the necessary details and click **Next** to open the Select Candidates page for the succession plan.
  - e. On the page toolbar, click **Find Best Fit** to find the best fit person for a model profile and add the person as a candidate.
- From the Select Members page when creating or editing a talent pool:
  - a. Select **Navigator > My Client Groups > Succession Plans**.

- b.** Click the Talent Pools tab.
- c.** Click **Create** to create a talent pool, or select an existing pool and click **Edit** from the tab toolbar.
- d.** Enter or edit the necessary details and click **Next** to open the Select Members page for the succession plan.
- e.** On the page toolbar, click **Find Best Fit** to find the best fit person for a job profile and add the person as a member.

## Access the Best-Fit Feature as a Manager

Depending on the privileges assigned to the manager role, managers can find the best-fit job or person for a person.

### Finding the Best-fit Job or Person for a Person

Managers can find the best-fit job or person for a person by using one of the following navigation paths:

- From the Team Talent page:
  - a.** Select **Navigator > My Team > Team Talent**.
  - b.** Click the link to a report. The Skills and Qualifications page of the report opens.
  - c.** In the Related Links panel, click the corresponding link to find the best-fit job or person for your report.
- From the My Team page:
  - a.** Select **Navigator > My Team > My Team**.
  - b.** Click the link to a report. The Employment Information page of the report opens.
  - c.** Select **Actions > Talent Management** and then select the corresponding link to find the best-fit job or person for the selected profile.
- From the person smart navigation window:
  - a.** Click the More icon for a report on application pages to open the person smart navigation window.
  - b.** Select Talent Management and click the corresponding link to find the best-fit job or person for your report

## Access the Best-Fit Feature as a Worker

Depending on the privileges assigned to the employee role, workers can find the best-fit job profile for their person profile or add the job profile to their careers of interest list.

**Note:** As a worker, if you find the person best suited to your profile, by default, the search results display your profile.

### Finding the Best-fit Job

Workers can use one of the following navigation paths to access the best-fit job feature:

- From the Skills and Qualifications page:
  - a.** Select **Navigator > Me > Skills and Qualifications**.

- b.** In the Related Links panel, click **Find Best Fit Job**.
- From the person smart navigation window:
  - a. Click the More icon for your name on application pages to open the person smart navigation window.
  - b. Select Talent Management and click **Find Best Fit Job**.

By default, the Find Best Fit Job page displays results for job with overall fit greater than or equal to 90% criteria. You can modify the criteria to find the best-fit job for your role.

## How Best-Fit is Calculated

The Best-Fit feature compares the selected profile content with that of target profiles to find a list of profiles that are the closest match. You find the best fit job or person using the best-fit feature accessible from application pages.

Example: As an HR specialist, you can use the Best-Fit feature to find the person best suited for a job. The initial best-fit analysis results include a list of the profiles with the highest percentage of matching qualities. You can further narrow down the results by changing the priority of content types or individual content items. You can then view the percentage match for each content type.

### Considerations for How Best-Fit Is Calculated

The best-fit analysis considers content items of only these predefined content types:

- Competencies
- Honors and awards
- Work requirements
  - Note:** The work requirements content type does not have content items.
- Languages
  - Note:** For languages, only the item Reading is considered in best-fit calculations.
- Degrees
- Memberships
- Licenses and certifications

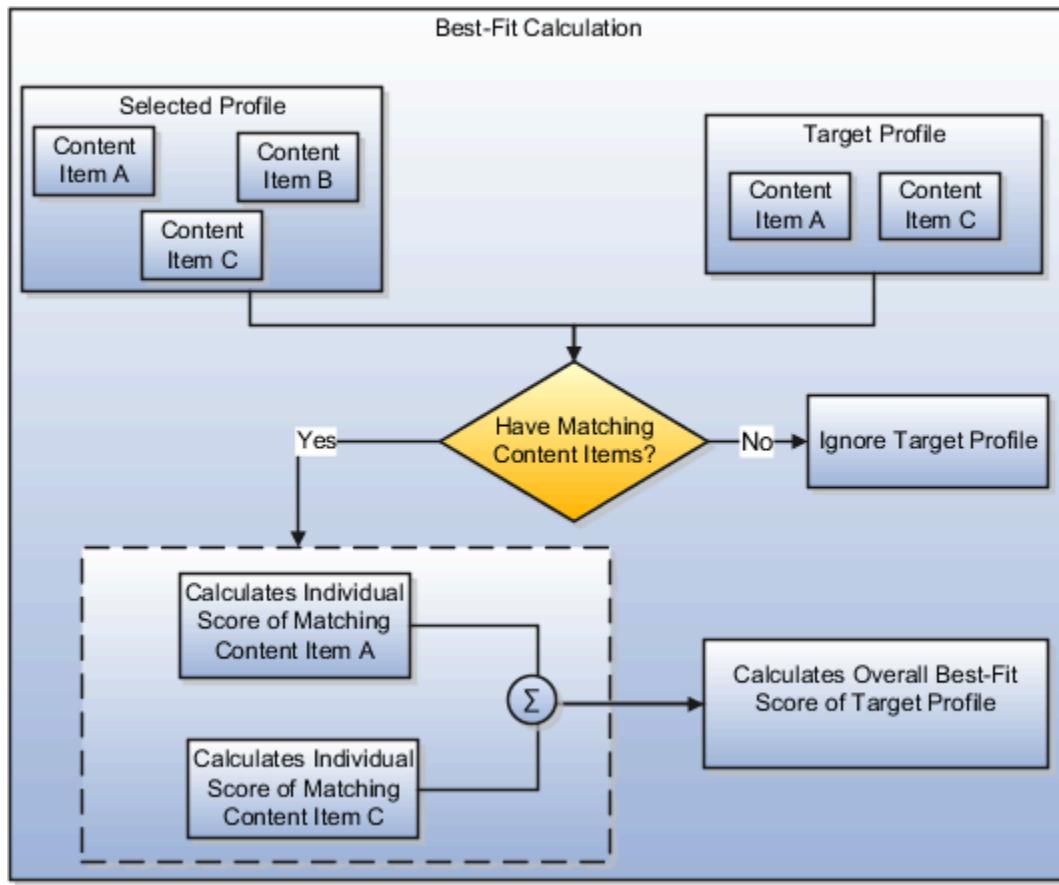
You can use the Best-Fit feature to calculate the overall score for a target profile. The application calculates the overall best-fit score of the target profile with respect to the selected source profile based. The overall score is based on the individual score of each matching content item of the selected profile.

## How the Overall Score in a Best-Fit Analysis is Calculated

The Best-Fit feature calculates the overall score for a target profile using an algorithm rule. The overall score appears in the Overall Fit column in the results section on the Find Best Fit page.

The algorithm for the best-fit analysis is automatically processed by the application.

The following image shows the best-fit algorithm rule.



## Selected Profile

The selected profile for which you want to find the profile that is the best-fit is source profile.

## Target Profile

The target profile is the profile for which the overall score is calculated. The application compares the content items of the target profile with those of the source profile.

## Individual Score

The individual score is the number assigned to each matching content item of the content types for which you specify the priority or importance. The individual score calculation algorithm depends on the best-fit analysis type.

## Overall Score Calculation Rule

The overall score is the total of all individual scores of all matching content items. If the total of all individual scores includes decimals, then the application rounds off the total score to derive the overall score. The application rounds down the score if the decimal digit is less than 5. However, it increases the score by 1 if the decimal digit is 5 or more.

Examples:

- If the total score is 56.4, the overall score is 56.

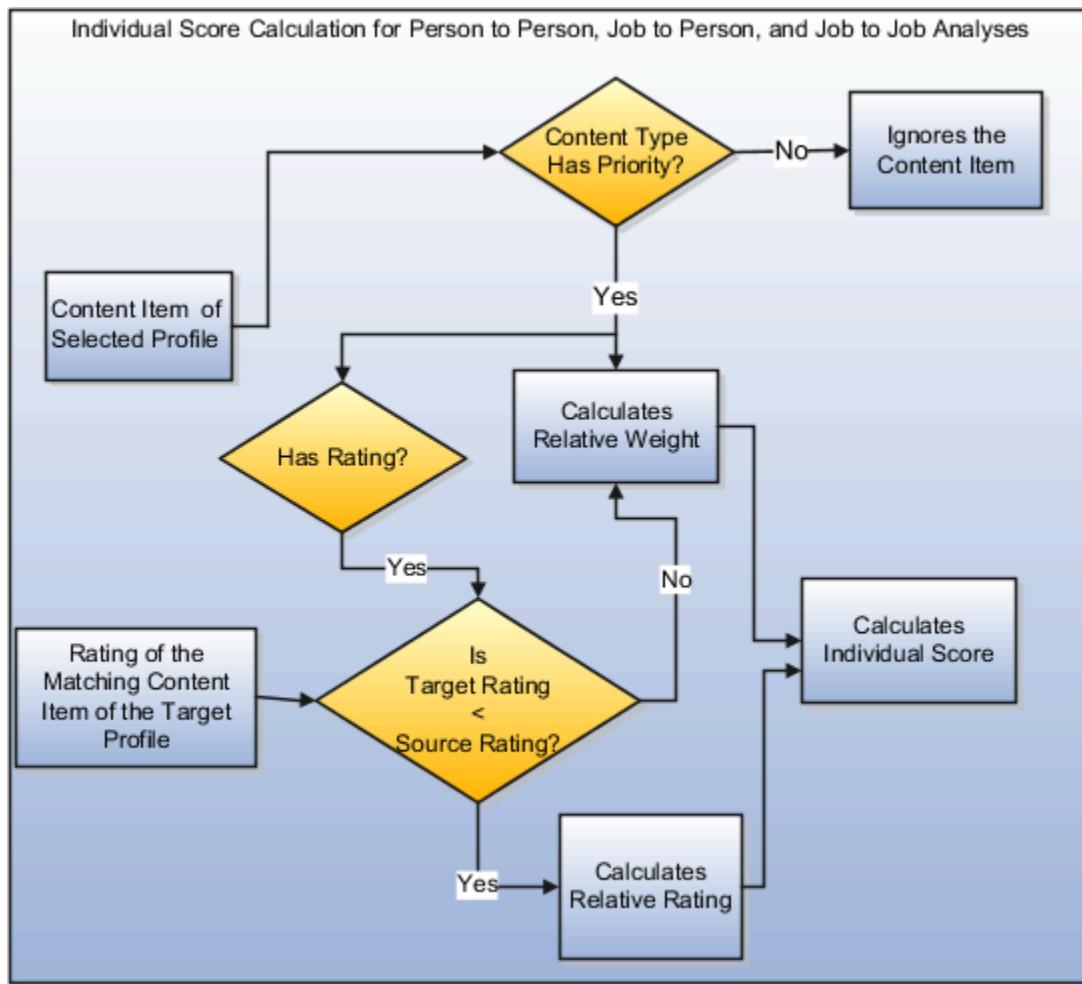
- If the total score is 56.7, the overall score is 57.

## How the Individual Score for Person to Person, Job to Person, and Job to Job Analyses is Calculated

In best-fit analyses, each content item of the selected profile must match these target profiles: person to person; job to person; and job to job.

The individual score of each content item of the target profile is based on the priority set at the content type or content item level.

The following graphic shows how the individual score is calculated for each content of the selected profile that match with the target profile. The graphic is applicable for only person to person, job to person, and job to job analyses.



### Deciding the Priority

The best-fit algorithm uses the priority assigned to the content type or content item of the selected profile. The priority is used to decide the overall score of the target profile. Depending on the analysis type, you select the priority on the

Find Best Fit Person or on the Find Best Fit Job page. You can either select a common priority value for all content items within a content type or specify priority using details.

To specify priority using details:

1. Select the **Priority Using Details** option on the Find Best Fit Person or Find Best Fit Job page.
2. Click the **Details** icon. The Best Fit Criteria page opens.
3. Specify the **Match** option for each content item within a content type. The value you select for the **Match** option is the priority value allocated at the content item level. The application calculates the individual score of each content item by considering the match value as the priority value for the content item.

**Note:** You can't use the **Priority Using Details** option for the Work Requirements content type. The priority for this content type is always specified at the content type level. The application considers only the Travel Domestically and Travel Internationally work requirements for best-fit calculations. The application calculates the individual score of the Work Requirements content type for a target profile as follows:

- If both travel requirements of the source and target profiles match, then the Individual Score = Relative Weight \* 100.
- If only one travel requirement of the source and target profiles match, then the Individual Score = 0.5 \* Relative Weight \* 100.
- If none of the travel requirements of the source and target profiles match, then work requirements are ignored in best-fit calculations.

The priority of a content type is populated using the HRT\_MATCH\_IMPORTANCE lookup type values. Depending on the **Match** option value, the application calculates the score for each content item within a content type.

The following table illustrates the value of each priority level. These values are application-defined and can't be modified.

Priority Level	Value
None	0
Low	1
Medium	2
High	3
Important	4
Very Important	5
Priority Using Details	Match of content item

## Profile Ratings in Best-Fit Calculations

The overall score of a target profile also includes any ratings entered for the content items of the Competencies and Languages content types.

The Competencies content type uses the Proficiency rating model. The following table illustrates the default rating levels of the Proficiency Rating Model and corresponding value that application assigns to the rating level.

Rating Level	Value
Foundation	1
Intermediate	2
Skilled	3
Advanced	4
Expert	5

The Languages content type uses the Language Rating Model. The following table illustrates the default rating levels of the Language Rating Model and corresponding value that application assigns to the rating level.

Rating Level	Value
Low	1
Moderate	2
High	3

## Relative Weight

The application calculates the relative weight of the content item for which you specify the priority at the content item or content type level. You specify the priority for the content types on the Best-Fit UI. The relative weight is the importance of a content item with respect to all the other content items in the source profile. The relative weight in the person to person, job to person, and job to job analyses is calculated only for the source profile content items. The relative weight is calculated using the following equation:

Relative Weight = Content item priority / Sum of all content items priorities

Example: The source profile content type has six content items for the Competencies content type and one content item for the Degrees content type. The priority is set at content type level. For the Competencies content type, the priority is set to Medium (2) and for the Degrees content type, it's set to Low (1). The relative weight for each content item:

- In the Competencies content type =  $2 / (2 + 2 + 2 + 2 + 2 + 2 + 1) = 2 / 13 = 0.153846$

- In the Degrees content type =  $1 / (2 + 2 + 2 + 2 + 2 + 2 + 1) = 1 / 13 = 0.076923$

## Relative Rating

If the content type with priority also has rating, the application calculates the relative rating of the content item associated with the content type. The relative rating is the rating of the content item in the target profile with respect to the source profile. The relative rating in the person to person, job to person, and job to job analyses is calculated using the following equation:

Relative Rating = Target Rating / Source Rating

Example: The rating level of a content item associated with the source and target profiles is 4 and 2 respectively. In this case, the relative rating for the content item in the target profile =  $2 / 4 = 0.5$ .

**Note:** The relative rating is considered in the individual score calculation only when the source rating is greater than or equal to the target rating.

## Individual Score of a Content Item

The individual score of a content item is calculated according to the criteria and the corresponding equation discussed in the following table. The table is applicable for person to person, job to person, and job to job analyses only.

Content Type Has Rating?	Criteria	Equation
No	Not applicable	Individual score = Relative Weight * 100
Yes	Target Rating > or = Source Rating	Individual score = Relative Weight * 100
Yes	Target Rating < Source Rating	Individual score = Relative Rating * Relative Weight * 100

In the earlier table:

- Target Rating is the rating level associated with a content item of the target profile
- Source Rating is the rating level associated with a content item of the source profile
- Relative Weight = Content item priority / Sum of all content items priorities
- Relative Rating = Target Rating / Source Rating

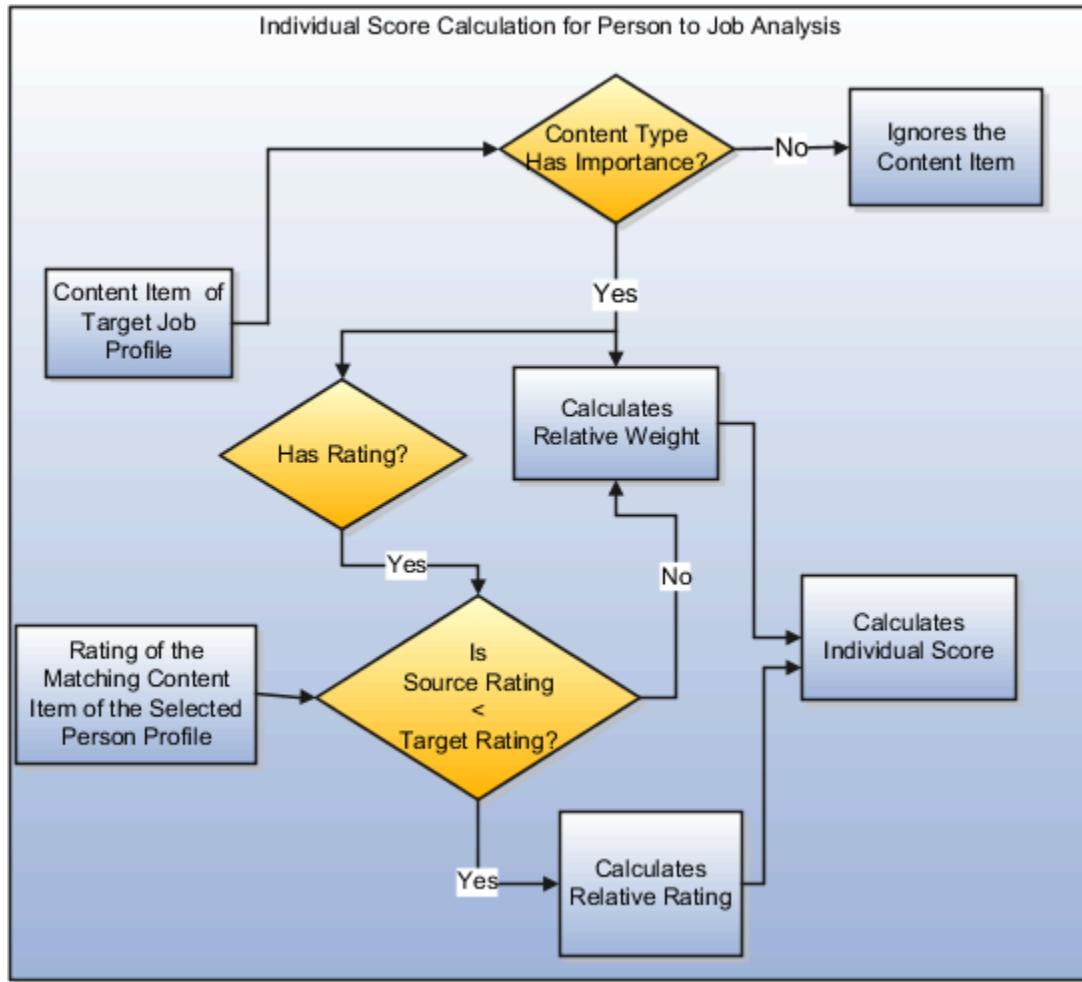
### Related Topics

- [Rating Models](#)

## How the Individual Score for Person to Job Analysis is Calculated

In the person to job analysis, each content item of the target job profile must match the selected person profile. The individual score of each content item of the target job profile is based on the importance of the content item.

The following graphic shows how the individual score is calculated for each content item of the target job profile. The content item must match with the corresponding content item in the selected person profile. The graphic is applicable only for the person to job analysis.



## Verifying the Importance

When you do a person to job analysis, the best-fit algorithm utilizes the importance of all content associated with a target job to find the best-fit job for the selected person profile. The option to enter the priority for a person profile type is disabled on the UI.

**Note:** The importance for the Work Requirements content type is always specified at the content type level. The application considers only the work requirement properties Travel Domestically and Travel Internationally for best-fit calculations. The application calculates the individual score of the Work Requirements content type as follows:

- If both travel requirements of the source and target profiles match, then the Individual Score = Relative Weight \* 100.
- If only one travel requirement of the source and target profiles match, then the Individual Score = 0.5 \* Relative Weight \* 100.
- If none of the travel requirements of the source and target profiles match, then work requirements are ignored in best-fit calculations.

The importance of a content type is populated using the HRT\_MATCH\_IMPORTANCE lookup type values.

## Profile Ratings in Best-Fit Calculations

Any ratings entered for the content items of the content type competencies and languages are also used in the calculation of the overall score of a target profile.

The Competencies content type uses the Proficiency rating model. The following table illustrates the default rating levels of the Proficiency Rating Model and corresponding value that application assigns to the rating level.

Rating Level	Value
Foundation	1
Intermediate	2
Skilled	3
Advanced	4
Expert	5

The Languages content type uses the Language Rating Model. The following table illustrates the default rating levels of the Language Rating Model and corresponding value that application assigns to the rating level.

Rating Level	Value
Low	1
Moderate	2
High	3

## Relative Weight

The application calculates the relative weight of the content item for which the importance is specified at the content item or content type level. The relative weight is the importance of a content item of the job profile with respect to all the other content items in the job profile. The relative weight in the person to job analysis is calculated only for the target profile content items using the following equation:

Relative Weight = Content item priority / Sum of importance for all content items

Example: The target job profile has in all three content types Competencies, Degrees, and Languages. The Competencies content type has in all six content items, the Degrees content type has one content item, and the

Languages content type has one content item. The target importance already specified for each content item in Competencies and Degrees is Medium (2) and for Languages is Low (1). The relative weight for each content item:

- In the Competencies content type =  $2 / (2 + 2 + 2 + 2 + 2 + 2 + 2 + 1) = 2 / 15 = 0.133333$
- In the Degrees content type =  $1 / (2 + 2 + 2 + 2 + 2 + 2 + 2 + 1) = 1 / 15 = 0.066667$
- In the Languages content type =  $1 / (2 + 2 + 2 + 2 + 2 + 2 + 2 + 1) = 1 / 15 = 0.066667$

## Relative Rating

If the content type for which the importance is specified has a rating, the application calculates the relative rating of the content item associated with the content type. The relative rating is the rating of the content item in the source profile with respect to the target profile. The relative rating in the person to job analysis is calculated using the following equation:

Relative Rating = Source Rating / Target Rating.

Example: The rating level of a content item associated with the source and target profiles is 2 and 4 respectively. In this case, the relative rating for the content item =  $2 / 4 = 0.5$ .

**Note:** The relative rating is considered in the individual score calculation only when the target rating is greater than or equal to the source rating.

## Individual Score of a Content Item

The individual score of a content item is calculated according to the criteria and the corresponding equation discussed in the following table. The table is applicable for a person to job analysis only.

Content Type Has Rating?	Criteria	Equation
No	Not applicable	Individual score = Relative Weight * 100
Yes	Target Rating < Source Rating	Individual score = Relative Weight * 100
Yes	Target Rating > or = Source Rating	Individual score = Relative Rating * Relative Weight * 100

In the earlier table:

- Target Rating is the rating level associated with the content item of the target job profile
- Source Rating is the rating level associated with the content item of the source person profile
- Relative Weight = Content item priority / Sum of all content items priorities
- Relative Rating = Source Rating / Target Rating

### Related Topics

- [Rating Models](#)

## Examples of Best-Fit Analysis

Use the best-fit analysis to find the profiles that most closely match a selected profile. You select a person or job profile (job or position) as a source profile and use the Best-Fit feature to find profiles that best match the source profile.

The best-fit analysis results are based on how well the content items of a target profile match content items of the source profile.

### Best-Fit Person Profile

As an HR specialist, you want to find the best-fit person profile for John.

John's person profile has the following content:

- Competencies as shown in the following table.

Competencies (Content Item)	Proficiency	Numeric Value of Rating
Action Oriented	Expert	5
Adapt Productively	Advanced	4
Communication	Expert	5

- Degrees:
  - Bachelor of Engineering
  - Master of Business Administration
- Language with details as shown in the following table.

Languages (Content Item)	Reading (Rating Value)	Writing (Rating Value)	Speaking (Rating Value)
English	Moderate (2)	Low (1)	High (3)

- Work Requirements:
  - Travel Domestically: No
  - Travel Internationally: No

You set the priority for the John's profile content on the best-fit person UI as illustrated in the following table and perform the Find Best Fit Person action on John's person profile.

Content	Priority (Numeric Value of the priority)
Competencies	Medium (2)
Honors and Awards	Medium (2)
Work Requirements	Medium (2)
Languages	Medium (2)
Degrees	Medium (2)
Licenses and Certifications	Medium (2)

In the results section, for an overall fit greater than 50%, the application displays the target person profile Alex.

Alex's person profile has the following content details:

- Competencies as shown in the following table.

Competencies (Content Item)	Proficiency	Numeric Value of Rating
Communication	Advanced	4
Problem Solving	Skilled	3

- Degrees:
  - Bachelor of Engineering
  - Diploma
- Languages as shown in the following table.

Languages (Content Item)	Reading (Rating Value)	Writing (Rating Value)	Speaking (Rating Value)
English	High (3)	Moderate (2)	Low (1)
French	Low (1)	Low (1)	Low (1)

- Work Requirements:
  - Travel Domestically: No
  - Travel Internationally: No

For the best-fit calculation, the application considers the individual score of the following four content items of Alex's person profile that match with the content items of John's person profile:

- Competencies: Communication
- Degrees: Bachelor of Engineering
- Languages: English
- Work Requirements: Travel Domestically and Travel Internationally

The following table illustrates the overall score calculation of Alex's person profile.

Content	Source Priority	Source Rating	Target Rating	Relative Weight	Individual Score
Competencies (Communication)	2	5	4	0.1428571	11.428568
Degrees (Bachelor of Engineering)	2	Not applicable	Not applicable	0.1428571	14.28571
Languages (English)	2	2	3	0.1428571	14.28571
Work Requirements	2	Not applicable	Not applicable	0.1428571	14.28571
				Total Score	54.285698
				Overall Score	54

The overall score is calculated as follows:

- The source profile John has in all seven content items with the priority for all content items set to Medium (2) at the content type level. Therefore, the relative weight for each content item =  $(2 / 14) = 0.1428571$  (where, Relative Weight= Content item priority/Sum of all content item priorities).
- The application calculates the individual score of the matching content using the appropriate equation as displayed in the following table.

Content	Criteria	Relative Rating	Individual Score Equation	Individual Score
Competencies (Communication)	Target Rating < Source Rating	Target Rating / Source Rating = 4 / 5	Individual Score = Relative Rating * Relative Weight *100	$(4 / 5) * 0.1428571 * 100 = 11.428568$
Degrees (Bachelor of Engineering)	Not applicable	Not applicable	Individual Score = Relative Weight * 100	$0.1428571 * 100 = 14.28571$

Content	Criteria	Relative Rating	Individual Score Equation	Individual Score
Languages (English)	Target Rating > Source Rating	Not applicable	Individual Score = Relative Weight * 100	0.1428571 * 100 = 14.28571
Work Requirements	Both travel requirements, Travel Domestically and Travel Internationally, of source and target profiles matches.	Not applicable	Individual Score = Relative Weight * 100	0.1428571 * 100 = 14.28571

- The total score is the sum of all individual scores. Therefore, total score = 54.285698.
- The application rounds off the total score to the nearest whole number. Therefore, the overall score of the target profile is displayed as 54.

## Best-Fit Job Profile

As an HR specialist, you want to find the best-fit job profile for the person profile for Beth.

Beth's person profile has the following content:

- Competencies as shown in the following table.

Competency (Content Item)	Proficiency	Numeric Value of Rating
Action Oriented	Intermediate	2
Communication	Intermediate	2
Leading People	Foundation	1
Working Globally	Intermediate	2

- Degrees: Technical Diploma
- Language as shown in the following table.

Language (Content Item)	Reading (Rating Value)	Writing (Rating Value)	Speaking (Rating Value)
English	Low (1)	Moderate (2)	Low (1)

- Memberships: ICAS

You perform the Find Best Job action on Beth's person profile. In the results section, for an overall fit greater than 40%, the application displays the job profile Accountant.

**Note:** In the person to job best-fit analysis, you can't set the priority on the best-fit job UI. Instead, the application considers the importance of the content items of the target job profile for best-fit calculations.

The target job profile Accountant has the following content types with the importance already specified for each content item or content type:

- Competencies as shown in the following table.

Competency (Content Item)	Proficiency (Numeric Value)	Importance (Numeric Value)
Action Oriented	Intermediate (2)	Medium (2)
Communication	Intermediate (2)	Medium (2)
Leading People	Intermediate (2)	Medium (2)
Working Globally	Intermediate (2)	Medium (2)
Analytical Skills	Intermediate (2)	Medium (2)
Embrace Change	Intermediate (2)	Medium (2)
Manage Risk	Intermediate (2)	Medium (2)
Market and Industry Knowledge	Intermediate (2)	Medium (2)
Resource Management	Intermediate (2)	Medium (2)

- Degrees as shown in the following table.

Content Item	Importance (Numeric Value)
Technical Diploma	Medium (2)

- Languages as shown in the following table.

Language (Content Item)	Reading (Rating Value)	Writing (Rating Value)	Speaking (Rating Value)	Importance
English	Low (1)	Low (1)	Medium (2)	Medium (2)

- Memberships

Content Item	Importance (Numeric Value)
ICAS	Medium (2)
CIMA	Medium (2)
ACCA	Medium (2)

- Work Requirements:

Requirements	Importance (Numeric Value)
Travel Domestically: No	Medium (2)
Travel Internationally: No	Medium (2)

For the best-fit calculation, the application considers the individual score of the following 7 content items of the job profile Accountant that match with the content items of Beth:

- Competencies: Action Oriented, Communication, Leading People, Working Globally
- Degrees: Technical Diploma
- Languages: English
- Memberships: ICAS

The following table illustrates the overall score calculation of the target job profile Accountant.

Content	Target Importance	Source Rating	Target Rating	Relative Weight	Individual Score
Competencies (Action Oriented)	2	2	2	0.066667	6.6667
Competencies (Communication)	2	2	2	0.066667	6.6667

Content	Target Importance	Source Rating	Target Rating	Relative Weight	Individual Score
Competencies (Leading People)	2	1	2	0.066667	3.33335
Competencies (Working Globally)	2	2	2	0.066667	6.6667
Degrees (Technical Diploma)	2	Not applicable	Not applicable	0.066667	6.6667
Languages (English)	2	1	2	0.066667	6.6667
Memberships (ICAS)	2	Not applicable	Not applicable	0.066667	6.6667
				Total Score	43.3335
				Overall Score	43

The overall score is calculated as follows:

- The target job profile Accountant has in all 15 content items with the importance (or priority) for all content items at the content type level set to 2. Therefore, the relative weight for each content item =  $2 / 30 = 0.066667$  (where, Relative Weight = Content item importance / Sum of all content item importance).
- The application calculates the individual score of the matching content using the appropriate equation as displayed in the following table.

Content	Criteria	Relative Rating	Individual Score Equation	Individual Score
Competencies (Action Oriented)	Target Rating = Source Rating	Source Rating / Target Rating = 2 / 2	Individual Score = Relative Rating * Relative Weight * 100	$(2 / 2) * 0.066667 * 100 = 6.6667$
Competencies (Communication)	Target Rating = Source Rating	Source Rating / Target Rating = 2 / 2	Individual Score = Relative Rating * Relative Weight * 100	$(2 / 2) * 0.066667 * 100 = 6.6667$
Competencies (Leading People)	Target Rating > Source Rating	Source Rating / Target Rating = 1 / 2	Individual Score = Relative Rating * Relative Weight * 100	$(1 / 2) * 0.066667 * 100 = 3.33335$
Competencies (Working Globally)	Target Rating = Source Rating	Source Rating / Target Rating = 2 / 2	Individual Score = Relative Rating * Relative Weight * 100	$(2 / 2) * 0.066667 * 100 = 6.6667$

Content	Criteria	Relative Rating	Individual Score Equation	Individual Score
Degrees (Technical Diploma)	Not applicable	Not applicable	Individual Score = Relative Weight * 100	0.066667 * 100 = 6.6667
Languages (English)	Not applicable	Not applicable	Individual Score = Relative Weight * 100	0.066667 * 100 = 6.6667
Memberships (ICAS)	Not applicable	Not applicable	Individual Score = Relative Weight * 100	0.066667 * 100 = 6.6667

- The total score is the sum of all individual scores. Therefore, total score = 43.3335.
- The application rounds off the total score to the nearest whole number. Therefore, the overall score of the target profile is displayed as 43.

*Related Topics*

- [Rating Models](#)

## FAQs for Compare Profiles and Find the Best Fit

### How are the differences between comparison attributes identified?

The differences are calculated between the attributes of the secondary items and the base item. Differences between numeric values are calculated and displayed; character differences are indicated using an icon.

When the data includes a range (competency ratings, for example), the comparison displays the differences from each end of the range. The comparison, however, doesn't display the differences for values that lie within the range. For example, consider that you're comparing the competency requirements of two job profiles. The competency requirement of the base job is between 2 and 4 and the secondary job is between 1 and 3. The comparison displays the difference between the minimum competency requirement of the secondary job (1) and the base job (2) as -1. The comparison doesn't display the difference between the maximum values because the maximum competency requirement of the secondary job (3) lies within the competency requirement of the base job (between 2 and 4).

### How is risk of loss assessed?

Line managers and human resource specialists enter the risk of loss information in a person's profile manually, there is no automated risk assessment process.

They evaluate the risk of workers changing jobs or leaving the enterprise and select the ratings.

## Can I add additional data sets to the comparison?

No, you can only select from the list of data sets available for an item type.

## What happens if I remove the comparison base?

The next item in the comparison is automatically designated as the comparison base and the differences from the new base item are indicated. Note that the comparison must always include a base item.

## What's the difference between performing a best-fit analysis and comparing profiles?

Perform a best-fit analysis to find matching profiles for a specified profile using a wide variety of criteria. For example, use best-fit analysis to find the top five person profiles matching a job profile, based on competency requirements, language skills, and certifications.

Compare profiles to evaluate the similarities and differences between known profiles and identify the most suitable profiles. For example, compare the five person profiles identified by the best-fit analysis and identify the person most suited to the job.

To compare or perform a best-fit analysis, use the Compare action in the smart navigation.

## FAQs for Creating and Updating Profiles

### What happens if I change the status of a model profile to inactive?

If you change the status of a model profile associated with a job or position to inactive, the model profile is no longer available.

The profile is visible only to an administrator. The profile isn't available when you perform a best-fit analysis or a comparison of profiles, or when you search for model profiles. Any workforce structures that were associated with the inactive model profile are made available to associate with another active model profile.

The profile is also removed from workers' interest lists. A notification is sent to HR specialists and managers, and to those workers who have the profile in their interest list.

*Related Topics*

- [Profile Types](#)
- [Content Types](#)
- [Content Section Properties](#)

## What's a competency gap chart?

A competency gap chart is a graphical representation of how well your competency ratings match the required proficiency ratings of a job or position profile.

The job or position profiles to which you can compare your profile include your assignments and the profiles in your interest list. The application generates competency gap chart using only those competencies that appear in both your profile and the selected job or position profile. Select **Navigator > Me > Skills and Qualifications** to view the competency gap chart on the Skills and Qualifications page. You can also view the competency gap chart for each explored role or roles added as careers of interest in the Career Development work area.

Use the competency gap chart in your career development to determine whether you're already qualified for the selected job or position, or if areas exist where you need further development. If you identify gaps, you or your manager can also add a goal for the competency for which you have lesser ratings in the Career Development work area. For example, if your rating for the Leadership competency is 3 and the targeted rating for that competency in the Product Manager job is 4, you might research training classes or ask for projects that would help you improve your leadership capabilities. In the Career Development work area, you can also add a goal to the Leadership competency to help you improve your leadership capabilities.

If the job or position profile contains fewer than three competencies, then the competency gap chart is displayed as a bar chart. Otherwise, the chart is displayed as a radar chart. The compatible percentage for a role is automatically calculated using the best-fit analysis tool.

*Related Topics*

- [Career Development Work Area](#)

## What's a career statement?

A career statement is a summary of your career goals. You can enter your career statement on your Career Planning page or Career Development page.

Anyone who can view your career planning information can view your career statement. To open your Career Planning page or Career Development page, select **Navigator > Me > Career and Performance**. In the Career Development work area, you can view the career statement in the Career Statement section.

Note that career statements are for informational purposes only.

## Why did the potential level change when I changed the potential score?

The relationship between the potential score and potential level is defined in the potential rating model.

When you change the potential level, the application updates the potential score with the numeric rating for that level. When you change the potential score, the application updates the potential level with the level in the rating model that has a numeric rating closest to the potential score. To change a talent rating of your direct report, click the Edit icon in the Talent Ratings section on the Career Planning page of the selected report's person spotlight. To access a direct report's person spotlight:

- Select **Directory > Directory**, search for the worker, and click the worker's name in the search results
- Select **My Team > My Team** and click the worker's name on the My Team page
- Select **My Team > Team Talent** and click the worker's name on the Team Talent page
- Select **My Team > Team Compensation** and click the worker's name on the Team Compensation page
- Open the person smart navigation window from application pages

For example, assume the first two rating levels in the potential rating model contain numeric ratings 1.5 and 2, respectively. If you assign a potential score of 1.7 to a worker, then the potential level for the worker is updated with the first potential level in the rating model, because 1.7 is closer to the numeric rating of 1.5 than it's to the numeric rating of 2.

## What happens if I update the talent ratings on the career planning page?

The talent review process uses these ratings on a worker's profile to build talent review information: talent score, performance rating, potential level, risk of loss, and impact of loss.

If you're preparing for a talent review meeting and you update talent ratings, then the changes are reflected on the Prepare Content Review page. When the talent review meeting concludes, the application automatically updates workers' Career Planning page with the final ratings for talent score, performance rating, potential level, risk of loss, and impact of loss. With the exception of the risk and impact of loss, all ratings from the talent review meeting are assigned a unique instance qualifier. The instance qualifier identifies them as those that resulted from the talent review meeting. If you then update these ratings on the Career Planning page, the talent review ratings remain in the database, but you can see your updates on the Career Planning page instead of the talent review ratings. You open the Career Planning page of a worker in the worker's person spotlight.

Updating the career potential information also affects the performance-potential analytic in the performance management business process.

## How can I prevent my manager from viewing job or position profiles in my interest list?

On your Career Planning page, click **Edit**, and select the **Private** check box for the job or position profile. To open your Career Planning page, select **Navigator > Me > Career Planning**.

Only you can view job and position profiles that are set to private. Anyone who can view your career planning page can view only those job and position profiles that aren't set to private.

## What's the difference between the suggestions list and the interest list?

The suggestions list is automatically generated for you each time you view your Career Planning page. To open your Career Planning page, select **Navigator > Me > Career Planning**.

This list contains profiles of jobs or positions that are suitable for you. The suggested profiles are based on an analysis of how well your competencies, skills, and qualifications match those of the job or position profile.

You create the interest list by browsing profiles of jobs and positions and adding those that you might like to pursue. Your manager can also add job or position profiles to your interest list as suggestions for the next step in your career. You and your manager can also move profiles of jobs and positions from the suggestions list to the interest list.

## Can I edit skills and qualification data of a person's profile?

Yes. Depending on the content section access settings for your role, you can view and edit any of the predefined or custom content of a worker's profile.

## How can I add content to my profile?

Select **Me > Skills and Qualifications** on the Home page. Click **Edit** on the Skills and Qualifications page to edit or add the content to your profile.

Depending on the content section access settings for your role, you can view and edit any of the predefined or custom content on your profile.

## How can I hide an attribute on the person profile?

You must have the HR specialist role to hide an attribute on the person profile.

To hide an attribute on the person profile:

1. Click **Manage Profile Types** on the Tasks tab in the Profiles work area.

2. Search for the Person profile type and select the row for the profile type in the Search Results section.
3. Click **Edit** in the Search Results section to open the Edit Profile Type page.
4. On the Content Sections tab, select the content section that includes the attribute you want to hide.
5. In the Content Sections region, click the selected content section link to open the Content Section page.
6. In the Content Properties section, select **None** as the **Display** value for the attribute you want to hide.

## How can I delete an attribute from the person profile?

You must have the HR specialist role to delete an attribute from the person profile.

**Note:** You can hide predefined attributes, but you can't delete them.

To delete an attribute that isn't a predefined attribute from the person profile:

1. Click **Manage Profile Types** on the Tasks tab in the Profiles work area.
2. Search for the Person profile type and select the row for the profile type in the Search Results section.
3. Click **Edit** in the Search Results section to open the Edit Profile Type page.
4. On the Content Sections tab, select the content section that includes the attribute you want to delete.
5. In the Content Sections region, click the selected content section link to open the Content Section page.
6. In the Content Properties section, select the row for the attribute and click **Delete**.

## Modifying Talent Profiles

### How You Modify the Skills and Qualifications Page to View Talent Ratings

By default, line managers can view or edit talent ratings for a report on the report's Career Planning page.

However, by using Oracle Page Composer, you can modify the Skills and Qualifications page of reports to display talent ratings on the Skills and Qualifications page and hide talent ratings on the Career Planning page. To change a page, you must have the privilege to modify pages. After making your changes, depending on their accessibility to a talent rating type, line managers can view or edit the talent rating type on a direct report's Skills and Qualifications page. You manage the content section access settings of a talent rating type for a user role using the Manage Profile Types task. The task is available in the Setup and Maintenance, Profiles, or Person Management work area.

**Note:** You must use an active sandbox to modify the Skills and Qualifications page using Page Composer.

To display talent ratings on a direct report's Skills and Qualifications page:

1. Sign in as a user who has the privilege to modify the Team Talent page.
2. Select **My Team > My Team > Talent**.
3. To open the Skills and Qualifications page of a direct report, click the direct report.
4. Click the user name and from the Settings and Actions menu, select **Edit Pages**.
5. On the **Edit Pages** dialog box, select the **Edit** option for the Site layer and click **OK**.
6. Select **View > Source** at the top-left section of the page to open the Source edit mode.

**Tip:** By default, the Source window is collapsed in the bottom position. To change the Source window position to the left, select **View > Source Position > Left**. To see the source content, you may need to drag the page divider.

7. Click the **Skills and Qualifications** icon on the Skills and Qualifications page. The source tree moves to the corresponding region component.
8. Under the **panelGroupLayout: vertical** component for the **showDetailItem: Skills and Qualifications** node, select the disabled region component for the location: `/oracle/apps/hcm/profiles/core/publicUi/fuse/page/SkillsTalentRating.jsff` and click **Edit**.

**Note:** The location is displayed when you hover over a region component.
9. In the **Component Properties: region** dialog box, select the Display Options tab.
10. Select the **Visible** check box.
11. Click **OK** to close the dialog box. The Talent Ratings section appears on the Skills and Qualifications page.
12. Click **Close** to close Page Composer.
13. Publish your sandbox to make your changes available to users who are line managers.

To adjust the position of sections as they appear on the page, use Page Composer.

## How You Modify the Grid View of the Team Talent Page to Display Talent Score and N Box Cell Assignment Ratings

By default, line managers can't view or edit talent score and n box cell assignment ratings for a report on the Team Talent page in the grid view.

However, by using Oracle Page Composer, you can change the Team Talent page to display both the ratings in the grid view of the page. To change a page, you must have the privilege to modify pages. After changes have been made, depending on their accessibility to a talent rating type, line managers can view or edit the talent rating in the grid view of the Team Talent page. You can display only two ratings on a person card in the grid view of the Team Talent page. Therefore, to display talent score and n box cell assignment ratings, you must modify the existing ratings displayed in the grid view. You manage the content section access settings of a talent rating for a role using the Manage Profile Types task. The task is available in the Setup and Maintenance, Profiles, or Person Management work area.

### Prerequisites

Activate a sandbox.

### Modifying the Grid View

In the following procedure, the Performance rating is replaced with N Box Cell Assignment and the Potential rating with Talent Score.

To enable a line manager to view n box cell assignment and talent score ratings in the grid view of the Team Talent page:

1. Sign in as a user who has the privilege to access the Team Talent page.
2. Select **Navigator > My Team > Team Talent**. The Team Talent page appears in the grid view.

**Tip:** If the grid view isn't selected, click the **View Grid** icon.
3. Click your user name in the global area and from the Settings and Actions menu, select **Edit Pages**.

**Note:** If the **Confirm Task Flow Edit** dialog box appears anytime during this procedure, click **Edit** to continue.

4. On the **Edit Pages** dialog box, select the **Edit** option for the Site layer and click **OK**.
5. Select **View > Source** at the top-left section of the page to open the Source edit mode.

**Tip:** By default, the Dock pane is collapsed in the bottom position. To see the source content, you can drag the page divider to the top.

6. Replace existing labels on the person card of the Team Talent page with N Box Cell Assignment and Talent Score:
  - a. Click **Performance** on a person card on the Team Talent page. The source tree moves to the Performance component.
  - b. Right-click the component and select **Edit**. The **Component Properties** dialog box appears.
  - c. In the **Value** field, click the drop-down button and select **Select Text Resource**. The **Select Text Resource** dialog box appears.
  - d. In the **Key** field enter a unique value. For example, NB1. You use this value to reuse the label in other pages
  - e. In the **Display Value** field, enter the label for the n box cell assignment rating. For example, N Box Cell Assignment.
  - f. Click **OK**.
  - g. Click **Apply** and then **OK** to close the **Component Properties** dialog box.
  - h. Repeat steps 6.1 through 6.8 to change the label Potential as Talent Score on the person card on the Team Talent page. For Talent Score, you can enter values for the **Key** and **Display Value** fields as shown in the following table.

Field	Example
<b>Key</b>	TS1
<b>Display Value</b>	Talent Score

7. Use the expression language (EL) to display the value of the n box cell assignment and talent score ratings below the edited labels:
  - a. In the source tree, select the **outputText** node below the **outputText: N Box Cell Assignment** node.
  - b. Right-click the component and select **Edit**. The **Component Properties** dialog box appears.
  - c. In the **Value** field, click the **Edit** icon and select **Expression Builder**. The **Edit** dialog box appears.
  - d. In the **Type a value or expression** field, enter the **#{row.NBoxAssignment}** expression.
  - e. Click **OK**.
  - f. Click **Apply** and then **OK** to close the **Component Properties** dialog box.
  - g. In the source tree, select the **outputText** node below the **outputText: Talent Score** node.
  - h. Repeat steps 7.2 through 7.6 to enter the **#{row.TalentScore}** expression for the talent score rating.
8. Click **Close** to close Page Composer.
9. Publish your sandbox to make your changes available to users who are line managers.

# How You Modify the List View of the Team Talent Page to Display Talent Score and N Box Cell Assignment Ratings

By default, line managers can't view or edit a report's talent score and n box cell assignment ratings on the Team Talent page in the list view.

However, by using Oracle Page Composer, you can modify the Team Talent page to display both the ratings in the list view of the page. After you make changes, depending on their accessibility to a talent rating type, line managers can view or edit the talent rating in the list view of the Team Talent page. You manage the content section access settings of a talent rating for a user role using the Manage Profile Types task. The task is available in the Setup and Maintenance, Profiles, or Person Management work area.

## Prerequisites

Activate a sandbox.

## Modifying the List View

To enable line managers to view n box cell assignment and talent score ratings in the list view of the Team Talent page:

1. Sign in as a user who has the privilege to access the Team Talent page.
2. Select **Navigator > My Team > Team Talent**. The Team Talent page appears in the grid view.
3. Click the **View List** icon.
4. Click your user name in the global area and from the Settings and Actions menu, select **Edit Pages**.

**Note:** If the **Confirm Task Flow Edit** dialog box appears anytime during this procedure, click **Edit** to continue.

5. On the **Edit Pages** dialog box, select the **Edit** option for the Site layer and click **OK**.
6. Select **View > Source** at the top-left section of the page to open the Source edit mode.

**Tip:** By default, the Dock pane is collapsed in the bottom position. To see the source content, you can drag the page divider to the top.

7. On the Team Talent page, click **Potential** or any other talent rating. The source tree moves to the corresponding rating component.
8. Under the **panelGroupLayout: vertical** component for the **panelStretchLayout** node, select the disabled node **panelLabelAndMessage:N Box Cell Assignment** and right-click.
9. Select **Edit**. The **Component Properties: N Box Cell Assignment** dialog box appears.
10. On the Display Options tab, select the **Visible** check box and click **Apply**.
11. Click **OK** to close the dialog box.
12. Under the **panelGroupLayout: vertical** component for the **panelStretchLayout** node, select the disabled node **panelLabelAndMessage:Talent Score**.
13. Click **Edit**. The **Component Properties: Talent Score** dialog box appears.
14. On the Display Options tab, select the **Visible** check box and click **Apply**.
15. Click **OK** to close the dialog box.
16. Click **Close** to close Page Composer.
17. Publish your sandbox to make your changes available to users who are line managers.

# 4 Administration Tasks

## 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.	<b>Batch Process Type:</b> Assign Performance Document Assign Check-In Template Select one of the batch process types to select these parameters:  <b>Effective as of Date:</b> It determines when workers are eligible for performance documents or check-in templates. If you set a future date, performance documents can only be created for eligible employees from that date.  Select Current Date to use the system date every time the process runs.  <b>Review Period:</b> Using this, you can find a performance document that matches the selected review period.  <b>Performance Document Name:</b> Select the name of the performance document that you want to process.  OR • <b>Check-In Template Name:</b> Select the name of the check-in template that you want to process.  <b>Create Eligible Performance Document:</b> If you select this, the application automatically creates performance documents for each eligible employee. <b>Purge Historic Performance Eligibility Status Data:</b> Choose whether to permanently delete historic performance eligibility status data to improve system performance.

Process Name	Description	Parameters
		<b>Purge Older Than:</b> 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.	<p><b>Action:</b></p> <ul style="list-style-type: none"> <li>Preview: select to preview the changes before submitting.</li> <li>Update: select to submit the changes.</li> </ul> <p><b>Performance Document:</b> The document for which this is applicable.</p> <p><b>Worker Person Number:</b> The worker person numbers for whom the performance document is applicable.</p>
Performance Management Diagnostics Report	Initiates the process for the diagnostics report for Performance Management.	<p>Select one of the following report types:</p> <ul style="list-style-type: none"> <li>Performance Document</li> <li>Check-In</li> <li>Performance Management Security</li> </ul> <p><b>Work Person Number:</b> The worker person numbers for whom the performance document is applicable.</p>
Purge Historic Performance Management Eligibility Status Data	Initiates the job to delete historic performance management related eligibility status data.	<b>Purge Data Older Than Date:</b> 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.	<p><b>Action:</b></p> <ul style="list-style-type: none"> <li>Preview: select to preview the changes before submitting.</li> <li>Update: select to submit the changes.</li> </ul> <p>Select the Manager type to reassign the documents using these options:</p> <ul style="list-style-type: none"> <li>Employee's line manager</li> <li>Terminated manager's manager</li> </ul> <p><b>Review Periods:</b> Specify whether performance documents in specific review periods or all review periods should be processed.</p>
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.

Process Name	Description	Parameters
Synchronize Goal Data in Performance Documents	Synchronizes goal data in performance documents with the goal data in Goal Management and Career Development.	<p><b>Action:</b></p> <ul style="list-style-type: none"> <li>Preview: select to preview the changes before submitting.</li> <li>Update: select to submit the changes.</li> </ul> <p><b>Review Period:</b> Use the review period to help filter and find the goal plans you want to process.</p> <p><b>Goal Plans:</b> Select the goal plans from which data needs to be synchronized to performance documents.</p>
Synchronize Person Profile Competencies in Performance Documents	Synchronizes competencies in performance documents with the person profile competencies in Profile Management.	<p>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.</p> <p><b>Action:</b></p> <ul style="list-style-type: none"> <li>Preview: select to preview the changes before submitting.</li> <li>Update: select to submit the changes.</li> </ul> <p><b>Review Period:</b> Use the review period to help filter and find the goal plans you want to process.</p> <p><b>Performance Document Name:</b> Select the performance document in which competencies need to be synchronized.</p> <p><b>Worker Person Number:</b> Specify the person numbers of the workers to whom the performance document is applicable.</p>
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?](#)

## Process Mass Actions for Performance Documents

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

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

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

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

## HCM Data Loader and Performance Business Objects

HCM Data Loader is a tool for bulk-loading and maintaining data about business objects.

You can load data from either delimited data (.dat) files or spreadsheets. HCM Data Loader has a comprehensive user interface for loading data, monitoring progress, and reviewing any errors. The user interface also includes detailed information about component hierarchies and attributes of supported business objects.

HCM Data Loader supports these business objects for Performance Management:

- Performance Document
- Performance Documents and Goals Assignment Transfer
- Performance Document Eligibility
- Check-in Documents
- Requested Feedback
- Anytime Feedback

## View Business Objects

To view business objects, follow these steps:

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

## Performance Document

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

It has these child components:

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

## Performance Documents and Goals Assignment Transfer

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

## Check-In Documents

Create or delete check-in documents for an employee with this object. Use the child component, Discussion Topic, to add or delete discussion topics to the check-in documents.

## Performance Document Eligibility

Using this business object, you can run the eligibility process for specific employee assignments, instead of all assignments. This way, you can't process excluded assignments or change eligible assignments to ineligible or vice versa.

## Requested Feedback

Using this business object, you can delete sent feedback requests as well as received feedback responses. When you delete a feedback request, the responses associated with it are also automatically deleted. You can also delete feedback requests about an object. When you do this, the object's feedback responses are also deleted.

## Anytime Feedback

Using this business object, you can delete anytime feedback responses.

**Note:** If the person information of the person providing the feedback is removed, the feedback or performance review comments they provided to employees continues to display. However, the person's name is obfuscated.

*Related Topics*

- [Overview of HCM Data Loader](#)

## How You Send Email Notifications

As an HR specialist you can send email notifications to workers to remind them of upcoming events and tasks concerning performance documents.

For example, you use email notifications to inform a department about an upcoming performance evaluation. Recipients receive notification both by email and on their worklist. Use **Send Email Notification** on the Performance Documents task page.

### Population

You must enter at least one of the following criteria to filter the recipient population:

- Department
- Performance document name

Select a department to notify all workers in that department. Select a performance document to notify all workers eligible to access the document. Select both to notify only workers within the selected department who are eligible to access the document. If the performance document isn't configured with eligibility, the notifications are sent to all workers.

In addition, you can further filter the recipient list by selecting the hire date range. Select the start and end range of the hire date to only send notifications to workers who were hired within the range. For example, you can use the hire date to notify workers of an upcoming annual evaluation that coincides with the worker hire date.

### Email Subject and Text

You can edit the default email subject and text to any message that suits your purpose. You can format the text message and add links to it.

### Increase the Number of Recipients for Notification

Notifications are sent to the first 500 recipients processed. To increase the number of recipients, administrators should create the profile option HRA\_SEND\_EMAIL\_POPULATION\_LIMIT, and set the number of employees they want to receive the notifications. A value of -1 will send to all eligible recipients.

*Related Topics*

- [Overview of Profile Options](#)

# How You Transfer Performance Documents

HR specialists and managers can transfer worker performance documents from one manager to another. For example, they can transfer the performance document when a worker is assigned to a new manager, or the current manager leaves the organization.

When a worker has more than one document, the HR specialist and manager can transfer the documents to the same manager or different managers.

## Transfer by HR Specialists

HR specialists can transfer performance documents in any status from one manager to another. They must have security access to the workers for whom they're transferring the documents. HR specialists can't transfer their own documents to another manager.

1. Go to **My Client Groups > Performance > Performance Documents**.
2. Search for the performance documents that you want to transfer.
3. Select the performance documents and click **Actions > Transfer**.
4. Select a reason for transferring the document.

**Note:** Organizations can add their own reasons to the default list by using the `ORA_HRA_MASS_UPD_TASK_REASON` profile option in the **Performance Lookups** task in the Setup and Maintenance work area.

5. Enter the new manager's name and select it from the list.
6. Click **Submit**.

## Transfer by Managers

Managers can transfer performance documents to another manager. They can transfer a single document or multiple documents at a time. Managers can't transfer completed or canceled performance documents.

1. Go to **My Team > Performance**.
2. Search for the employee or employees whose performance document you want to transfer.
3. From the **Actions** menu, select **Transfer**.
4. Enter the new manager's name and select it from the list.
5. Click **Save and Close**.

## Transfer Using HCM Data Loader (HDL)

As an HR specialist, you can perform a mass transfer of performance documents to new managers. You can use the Performance Document object in both HCM Spreadsheet Data Loader (HSDL) and HCM Data Loader (HDL). Simply change the manager's assignment number to the new manager's assignment number and enter **Update Performance Document Manager** in the Operation attribute. Make sure that the assignment number of the new manager isn't an assignment number for the employee being evaluated. If the assignment number of the new manager belongs to a participant with an in progress or not started feedback request then the participant is locked out of the request.

## Transfer 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:



[Watch video](#)

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.
  - o 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.

## Select Participant as a New Manager

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

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

## Impact of Transferring Performance Documents

After you transfer a performance document:

- The previous performance document manager can't view the performance document unless they still have access to the employee. If they still have access to the employee, they can see a read-only version of the document.
- The new manager can view the performance document and all the data in it.
- Performance ratings and comments from the previous manager and participant feedback remain intact in the performance document.
- The new manager can edit the performance document, including any comments and ratings provided by the previous manager.

- The worker, new manager, and feedback participants can continue the evaluation by performing the next available task in the process flow.

If notifications are enabled, the previous manager, the new manager, and the employee receive notifications when an HR specialist transfers the document.

## How You Change Due Dates in Performance Document

As an HR specialist can change the due date of any task in the performance document.

Based on the number of performance documents you want to update, use these options:

- Use the Change Due Date option in the Actions menu on the Performance Documents page: This allows you to change the due dates for a maximum of 200 selected performance documents.
- Use Change Task Due Dates action in the Process Mass Actions for Performance Documents task: This allows you to mass change the due dates by selecting the population and not individual performance documents.

After you select a performance document, you can enter a revised due date for any of the available tasks. You can then choose to preview the change and process later or submit the changes for processing immediately.

Here are some guidelines that you need to keep in mind when changing the due date for a performance document:

- You can edit the due date of any task within a performance document that isn't completed or canceled.
- You can search for any performance documents and workers to whom you have access.
- You can't search for your own performance documents.
- You can use the ORA\_HRA\_MASS\_UPD\_TASK\_REASON lookup to list reasons that HR specialists can choose when changing the due date.

## Complete Performance Documents

Human resource (HR) specialists and managers can change a performance document to Completed status even when all tasks aren't completed in the document.

They can complete performance documents when, for example, managers or employees refuse to acknowledge documents or leave the organization, thus halting the document processing.

This table shows how HR specialists and managers can mark a performance document as completed.

Who	How
HR specialists	<ol style="list-style-type: none"><li>1. Go to <b>My Client Groups &gt; Performance &gt; Performance Documents</b>.</li><li>2. Search for and select the performance documents.</li><li>3. From the Actions menu, select <b>Complete</b>.</li></ol>

Who	How
	<p>4. Optionally, choose a reason for completing the document.</p> <p><b>Note:</b> Organizations can add their own reasons to the default list by using the ORA_HRA_MASS_UPD_TASK_REASON profile option in the <b>Performance Lookups</b> task in the Setup and Maintenance work area.</p> <p>5. Click <b>Submit</b>.</p>
Managers	<p>1. Go to <b>My Team &gt; Performance</b> or the Performance tab on the employee's person spotlight page.</p> <p>2. Select the appropriate review period.</p> <p>3. From the Actions menu of the performance document that you want to mark as completed, select <b>Complete</b>.</p>

**Note:** Using HCM Data Loader, HR specialists can mark a performance document as **Complete** for multiple employees at the same time.

## Performance Documents You Can Complete

HR specialists can search for and complete performance documents that aren't already completed or canceled. They can search for performance documents and employees they have security access to, but not their own performance documents.

Managers can complete documents they manage that aren't already completed or canceled.

## Impact of Completing the Performance Document

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

- The content, ratings, and comments that exist are updated in the employee profile according to the configuration specified in the performance template.
- The document can be reopened later to continue from the point at which it was completed.
- When notifications are enabled, employees and managers are notified about the completion of the performance document. This table shows the notifications to enable.

Notification	Who is Notified
HR completes worker's performance document	Employees whose performance document is completed and their manager
Manager completes worker's performance document	Employee whose performance document is completed

# Control Sort Options for Displaying Performance Documents

You can reduce the need for employees to change the sort order options for performance documents on the employee Performance Spotlight page and the manager Evaluate Performance page by setting the default value to meet your organization's requirements.

The HR implementer can change the default value and sort order options that display on the Performance Spotlight page by modifying the Performance Document Sorting Statuses lookup codes (ORA\_HRA\_PERF\_DOC\_STS\_SORT\_BY).

1. Go to Setup and Maintenance.
2. Click Setup and select Workforce Development.
3. Select Worker Performance > Performance Lookups.
4. Click the Performance Document Sorting Statuses lookup codes (ORA\_HRA\_PERF\_DOC\_STS\_SORT\_BY).
5. On the Lookup Codes section, you can edit the following Display Sequence and modify the meaning and description of each:
  - o All - 1 (default)
  - o Current - 2
  - o Canceled - 3
  - o Completed - 4

**Note:** The first item in the list with the lowest number is the default option. Simply assign the numbers in the display sequence to determine the default option and the order for which each will display in the list.

6. Click Save and Close.

## Control Sort Options for Displaying Performance Documents on the Evaluate Performance Page

The HR implementer can change the default value and sort order options that display on the Evaluate Performance page by modifying the Manager Performance Document Sorting Options lookup codes (ORA\_HRA\_EVAL\_PERF\_DOC\_SORT\_BY).

1. Go to Setup and Maintenance.
2. Click Setup and select Workforce Development.
3. Select Worker Performance > Performance Lookups.
4. Click the Manager Performance Document Sorting Options lookup codes (ORA\_HRA\_EVAL\_PERF\_DOC\_SORT\_BY).

**5.** On the Lookup Codes section, you can edit the following Display Sequence and modify the meaning and description of each:

- End Date - Latest to Oldest -1 (default)
- End Date - Oldest to Latest - 2
- Document Name - A to Z - 3
- Document Name - Z to A - 4

**Note:** The first item in the list with the lowest number is the default option. Simply assign the numbers in the display sequence to determine the default option and the order for which each will display in the list.

**6.** Click Save and Close.

## How You Move Performance Tasks

As HR specialists, you can move tasks in the process flow of a performance document forward to bypass a task, or back to redo previously-completed tasks.

You can move tasks in performance documents for a group of employees or individuals. To move tasks, use the **Move Task Back** or **Move Task Forward** action on the Performance Documents page. To open this page, go to **My Client Groups > Performance > Performance Documents**.

### Move Forward to the Next Task

You can move a performance document forward from a task that hasn't been completed by a manager or employee to the next task in the process flow. Use this process to continue the evaluation process when an employee or a manager doesn't complete a task. When you move forward past a task, the status of the task you passed becomes **Bypassed**.

To move a task forward, all performance documents you select to move must be on the same task in the process flow. You can move a performance document forward only one task at a time. To move a performance document forward more than one task, you must repeat the process.

### View Bypassed Tasks

When you move a performance document forward past a task, the skipped task appears as **Bypassed** on these pages:

- Performance (employee's view)
- Evaluate Performance (manager's view)

### Move Back to a Previous Task

You can move performance documents from the current task back to a previously-completed task in the process flow. The current task is the task that's either in progress or not started, and the previous task is completed. The performance documents you select to move must be on the same task in the process flow.

When a task has a subtask, the tasks are moved at the subtask level. For example, the Review Meeting task can have two subtasks: **Indicate Review Meeting Held** performed by the manager, and **Acknowledge Review Meeting Held** performed by the employee. You can move the Review Meeting task back to either subtask.

## Effects of Moving Tasks Back to Previously-Completed Tasks

When you move a task back, the status for all subsequent tasks changes to **Not started** and the tasks must be completed again. If the tasks were previously completed, any data that were entered are saved.

## Task You Can't Move Forward or Back

You can move all but the **Manage Participant Feedback** task because it can be performed in parallel with other tasks.

Note that the **Manage Participant Feedback** task reopens if you move a performance document back to the **Manager Evaluation** task or an earlier task in the process flow. When the task is reopened, the previously-provided feedback isn't affected. But managers and employees can select additional participants and send new feedback requests.

When you move an Approval task forward, the task is marked as **Bypassed**. But the worklist and email notifications are still delivered as if the task was completed by the approver.

## Record Reasons for Moving Tasks

When you move tasks forward or back, you can select the reason for doing so. The reason code you select is used in reports, but isn't visible on the Performance Management pages. Only one reason code is stored for a task, so if you move a task more than once, only the latest reason code is stored.

# Examples of Moving Performance Tasks

You can move tasks in the process flow of performance documents forward and back to keep an evaluation on track, or redo past actions.

These scenarios illustrate typical reasons for moving tasks forward or back and the effects on the performance documents that they're a part of.

## Move a Task Forward When a Manager is on Leave

The process flow for the **FY 2020** review period's **Support Center Annual Evaluation** performance document includes these tasks:

1. Worker Self-Evaluation
2. Manager Evaluation of Workers
3. Worker Final Feedback

A line manager for the Support Center department, Daniel Wong, has provided overall ratings in the **Manager Evaluation of Workers** task for his direct reports. But he hasn't added comments for the individual goals and competencies yet. Daniel goes on long-term leave. The organization owner asks you to move the **Manager Evaluation of Workers** task forward so the employees can view their overall ratings. On the Performance Documents page, you select these filters:

- **Review Period:** FY 2020
- **Performance Document:** Support Center Annual Evaluation
- **Manager:** Daniel Wong

You select all the employee names and then the **Move Task Forward** action. Here's what happens after you move the process flow forward:

- All of Daniel's direct reports can now access the document to see the overall rating.
- Daniel's direct reports can perform the **Worker Final Feedback** task.
- The **Manager Evaluation of Workers** task is marked as **Bypassed** on the employee's Performance page.

## Move a Task Back to Reassess Goals

The process flow for the **San Francisco Sales Organization** performance document for the **FY 2020** review period includes these tasks:

1. Set Goals
2. Worker Self-Evaluation
3. Manager Evaluation of Workers
4. Share Performance Document
5. Confirm Review Meeting Held

You're in the middle of the performance cycle. Some employees are still setting their goals; others are performing their self-evaluations. An organization owner wants all employees and their managers in his organization to reassess employee goals for the evaluation because of new sales targets. On the Performance Documents page, you select these filters for every manager in your organization:

- **Review Period:** FY 2020
- **Performance Document:** San Francisco Sales Organization
- **Current Task:** Worker Self-Evaluation

You select all the employee names and then the **Move Task Back** action. Here's what happens when you move the process flow back a task:

- The **Set Goals** task becomes the current active task.
- The status of the **Worker Self-Evaluation** task is reset to **Not Started**.

## Reopen Performance Documents Task

HR specialists and managers can reopen performance documents so managers or worker can continue the worker evaluation.

Use the Reopen option in the Actions menu on the Performance Documents page. Managers can also use the Return to Worker option from the My Team work area.

## Search Criteria and Results

HR specialists can reopen performance documents for which the manager evaluation task status is Completed, and the document status is Canceled or Completed. Managers can reopen documents for which the manager evaluation status is Completed and the document status is not In Progress, Canceled, or Completed.

HR specialists can search for performance documents and workers they have security access to, but not for themselves or their own performance documents. Managers can search for any performance document they manage.

HR specialists can select and reopen multiple documents at one time. When doing so, they can optionally choose a reason for reopening them.

**Note:** Organizations can add their own reasons to the default list by using the ORA\_HRA\_MASS\_UPD\_TASK\_REASON profile option in the **Performance Lookups** task in the Setup and Maintenance work area.

## Impact of Reopening a Performance Document

After you reopen a performance document:

- The document is reopened.
- If the document was canceled, the document reopens and the manager or worker can continue working on it from the point at which it was canceled.
- If the document was completed, the last task is reopened. To move the reopened document to another task, the HR specialist can use the Update option in the Actions menu.
- The manager and worker receive notification when the HR specialist reopens a performance document.
- The worker receives notification when the manager reopens a performance document.
- The completed document is removed from any approvals queues.

In addition:

- All the data in the reopened performance document remains and appears as it was when the document was canceled or completed.
- When reopening a completed document, the worker profile data reverts to not include the data from the previously-completed document.

## Cancel Performance Documents

HR specialists and managers can cancel a performance document to remove it from the performance management process.

This table shows how HR specialists and managers can cancel a performance document.

Who	How
HR specialists	<ol style="list-style-type: none"><li>1. Go to <b>My Client Groups &gt; Performance &gt; Performance Documents</b>.</li><li>2. Search for and select the performance documents.</li><li>3. From the Actions menu, select <b>Cancel</b>.</li></ol>
Managers	<ol style="list-style-type: none"><li>1. Go to <b>My Team &gt; Performance</b> or the Performance tab on the employee's person spotlight page.</li><li>2. Select the appropriate review period.</li><li>3. From the Actions menu of the performance document that you want to cancel, select <b>Cancel</b>.</li></ol>

**Note:** Using HCM Data Loader, HR specialists can cancel performance documents for multiple employees at the same time.

## Performance Documents You Can Cancel

You can cancel documents in any status except those that are already canceled. Managers can cancel performance documents they manage but not if the performance documents are complete. HR specialists can search for performance documents and employees they have security access to, but they can't search for their own performance documents. HR specialists can select and cancel multiple performance documents at one time.

### Record Reason for Canceling

When HR specialists cancel performance documents, they can optionally choose a reason. Organizations can add their own reasons to the default list by using the ORA\_HRA\_MASS\_UPD\_TASK\_REASON profile option in the **Performance Lookups** task in the Setup and Maintenance work area.

### Impact of Canceling a Performance Document

Did you know that canceled documents aren't deleted permanently from the application? Also remember that you need to cancel a performance document before you can delete it. Here's what happens when you cancel a performance document:

- Any talent profile content that changed as a result of updates to the performance document, such as competency ratings, reverts to its original state before the performance document was created.
- When the notifications listed in this table are enabled, employees and managers are notified that the performance document is canceled.

Notification	Who is Notified
HR cancels worker's performance document	Employees whose performance document is canceled and their manager
Manager cancels worker's performance document	Employee whose performance document is canceled

You can restore or reopen performance documents to change the status from **Canceled** and resume the evaluation process. The content, ratings, and comments remain intact when you reopen or restore a document.

## Delete Performance Documents

Human resource (HR) specialists and managers can permanently delete canceled performance documents. But remember that after you delete a performance document, you can't restore the data it contains.

This table shows how HR specialists and managers can delete a performance document.

Who	How
HR specialists	1. Go to <b>My Client Groups &gt; Performance &gt; Performance Documents</b> .

Who	How
	<ol style="list-style-type: none"> <li>2. Search for and select the canceled performance documents that you want to delete.</li> <li>3. From the Actions menu, select <b>Delete</b>.</li> <li>4. Optionally, choose a reason for the deletion.</li> </ol> <p><b>Note:</b> Organizations can add their own reasons to the default list by using the ORA_HRA_MASS_UPD_TASK_REASON profile option in the <b>Performance Lookups</b> task in the Setup and Maintenance work area.</p> <ol style="list-style-type: none"> <li>5. Click <b>Submit</b>.</li> </ol>
Managers	<ol style="list-style-type: none"> <li>1. Go to <b>My Team &gt; Performance</b> or the Performance tab on the employee's person spotlight page.</li> <li>2. Select the appropriate review period.</li> <li>3. Filter the performance documents so that only those that are canceled are listed.</li> <li>4. From the Actions menu of the canceled performance document that you want to delete, select <b>Delete</b>.</li> </ol>

**Note:** Using HCM Data Loader, HR specialists can delete performance documents for multiple employees at the same time.

## Performance Documents You Can Delete

You can delete documents that are already canceled. Managers can delete canceled performance documents they manage. HR specialists can search for canceled performance documents and employees they have security access to, but they can't search for their own performance documents. HR specialists can select and delete multiple canceled performance documents at one time.

## Impact of Deleting a Performance Document

Here's what happens when you delete a canceled performance document:

- All the content added to the performance document along with ratings and comments are deleted permanently from the document.
- Any profile content that changed as a result of updates to a deleted performance document reverts to its original state before the document was created.
- You can still view the performance document on the Performance Management pages.
- When the notifications listed in this table are enabled, employees and managers are notified that the performance document is deleted.

Notification	Who is Notified
HR deletes worker's performance document	Employees whose performance document is deleted and their manager
Manager deletes worker's performance document	Employee whose performance document is deleted

To make the deleted performance document no longer available for an employee when eligibility profiles are used, HR specialists can use the Performance Eligibility task. To prevent employees and managers from creating anytime documents, implementors can deselect the **Available to Use** check box for the document period in the performance template used for the anytime document.

Implementors can enable audit to track the deletion of performance documents and the content in it. But note that you can't restore the deleted document and its content from the audit.

## Restore Performance Documents

Some completed performance documents may have been canceled in error or due to some administrative reasons. HR specialists and managers can restore such canceled performance documents to Completed status.

This table shows how HR specialists and managers can restore canceled performance documents.

Who	How
HR specialists	<ol style="list-style-type: none"><li>1. Go to <b>My Client Groups &gt; Performance &gt; Performance Documents</b>.</li><li>2. Search for and select the canceled performance documents that you want to restore.</li><li>3. From the Actions menu, select <b>Restore</b>.</li><li>4. Optionally, choose a reason for the restore.</li></ol> <p><b>Note:</b> Organizations can add their own reasons to the default list by using the ORA_HRA_MASS_UPD_TASK_REASON profile option in the <b>Performance Lookups</b> task in the Setup and Maintenance work area.</p> <ol style="list-style-type: none"><li>5. Click <b>Submit</b>.</li></ol>
Managers	<ol style="list-style-type: none"><li>1. Go to <b>My Team &gt; Performance</b> or the Performance tab on the employee's person spotlight page.</li><li>2. Select the appropriate review period.</li><li>3. Filter for performance documents with status as <b>Canceled</b>.</li><li>4. From the Actions menu of the performance document that you want to restore, select <b>Restore</b>.</li></ol>

## Performance Documents You Can Restore

HR specialists and managers can restore performance documents that meet these conditions:

- Current status of the document is **Canceled**.
- Document status was **Completed** before the document was canceled.

HR specialists can search for performance documents and employees they have security access to, but not themselves or their own performance documents. HR specialists can select and restore multiple performance documents at one time.

Managers can restore canceled performance documents they manage.

## Impact of Restoring a Performance Document

Here's what happens after you restore a performance document:

- The profile content, such as ratings and comments, that changed when the performance document was canceled is restored.
- When the notifications listed in this table are enabled, employees and managers are notified.

Notification	Who is Notified
HR restores worker's performance document	Employees whose performance document is restored and their manager
Manager restores worker's performance document	Employees whose performance document is restored

## How You Change the Feedback Due Date

Workers, managers, and HR specialists can change the feedback due date. How you change the feedback due date depends on which role you have. Note that the due date for participant feedback isn't enforced.

HR specialists change the participant feedback due date using the **Change Due Date** task. To reach the **Change Due Date** task, go to **My Client Groups > Participant Feedback**. Use the action **Change Due Date** when results are displayed. You can optionally select a reason for changing the due date.

Workers and managers can change the due date by resending the participant feedback request rather than just sending it. They can resend the request if all of these are true:

- Participant feedback task is still open
- Feedback request isn't locked
- Feedback request isn't completed
- Process flow used in the performance template is configured so the worker can request feedback; managers can always send the request

1. Navigate to the Performance page.
  - a. If you're a worker, click **Me > Career and Performance > Performance**.
  - b. If you're a manager, click **My Team > Career and Performance > Evaluate Performance**.
2. Select the review period.
3. Find the performance document for which you want to change the feedback date, for example, an employee's Annual 360 Development Evaluation.
4. Click the link on the participant feedback status (for example, **0 of 1 participants responded**) or from the **Actions** menu (shown by three dots), and select **Manage Participant Feedback**.
5. Click the check box by the participant who will receive a new date.
6. Click **Actions** and select **Resend Request**.

7. In the **Due** field, click the calendar icon and select the new date.
8. (Optional) Enter a message to the participant.
9. Click **Submit**.

## Search Criteria and Results

Change the feedback due date for performance documents you manage that meet these conditions:

- The performance document includes the Manage Participant Feedback task in the process flow.
- The manager or worker added participants to the performance document.
- Participants haven't submitted their feedback.
- Participants aren't locked out from providing feedback.

HR specialists can search for performance documents and workers they have security access to, but not for themselves or their own performance documents.

## Impact of Changing the Feedback Due Date

Participants can still provide feedback after the due date if the Manage Participant Feedback task isn't completed.

## How You Delete Participant Feedback

Human resource (HR) specialists can remove a participant and the participant's feedback from a performance document.

### Delete Feedback

The HR specialist can remove any participant and the feedback regardless of the participant's feedback status.

1. Go to **My Client Groups > Performance > Participant Feedback**.
2. Select the review period.
3. Select or enter a participant, employee, manager, or department.
4. In the search results area, select the participant that you want to delete, and click **Delete** from the **Actions** menu.
5. Select a reason for the deletion and click **Submit**.

## Search Criteria and Results

You can search for documents that include the Manage Participant Feedback task to remove a participant. You can search for performance documents or workers that you have access to, but you can't search for yourself or your own performance documents.

The participants for the performance document appear in the search results. You can select one or more of the participants and delete them from the performance document.

## Impact of Deleting Participant Feedback

When you delete the participants, their feedback also is removed from the document. You can't recover the participants or their feedback.

# Monitor Late Tasks in Performance Documents Task

As an HR specialist you can search for tasks in performance documents that managers and workers are late in performing and change the due dates or send reminder notifications for those tasks.

You can use filters on the Performance Documents page to find the performance documents with overdue tasks.

Late tasks are determined by the due date entered in the performance template for the document period from which the performance document is created. If more than one task is late in the performance document, then all the late tasks appear in the search results. You can search for one performance document name at a time. You can search for performance documents and workers you have security access to. You can't search for yourself or your own performance documents.

Here's what you need to know when you search for late tasks:

- You can search for performance documents and workers you have security access to.
- You can't search for yourself or your own performance documents.

## Change Due Dates

When you select a performance document and click **Change Due Dates**, you can edit any due date for any or all the tasks in the document.

## Send Reminders for Overdue Tasks

You can send reminder notifications to workers and managers for overdue tasks in a performance document. The action is enabled only for late tasks.

You can use this action to:

- Send notifications to the worker or manager task owner reminding them to work on late tasks.
- Send notifications to the performance document manager if it's a worker's task.
- Send notifications to other recipients, for example, a project manager.
- Send a notification for one late task in one performance document at a time.

# How Managers Return Performance Documents to Continue Evaluation

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

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

## Performance Documents You Can Return

You can see the **Return to Worker** action for performance documents that meet these conditions:

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

## Impact of Returning a Performance Document

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

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

# 5 Performance Management Setup and Maintenance

## 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](#)

## Rating Models

### Rating Models

Use rating models to rate workers on their performance and level of proficiency in the skills and qualities that are set up on the person profile.

You can also use rating models to specify target proficiency levels for items on a model profile, so that the model profile can be compared to workers' profiles. Use the Manage Profile Rating Models task in the Profiles work area to create a rating model.

To rate workers on their performance and proficiency, attach rating models to the content types included in the person profile. Then you can rate workers on the items within the type. For example, you can rate workers on the Communication content item within the Competencies content type.

For model profiles, you can specify target proficiency levels for items on the profile, to compare model profiles with worker profiles. Using the ratings:

- Managers can compare a model profile to workers' profiles with and determine the best person suited to fill a position.
- Workers can compare their profile to model profiles to identify:
  - Suitable positions within the organization.
  - Skill gaps and fill the gaps before applying for other positions.

Rating models that measure workers' potential and the impact and risk of loss are also available.

Rating models can include some or all of the following components, depending on the use for the model:

- Rating levels
- Review points
- Rating categories
- Distributions

## Rating Levels

Rating levels identify the qualitative values, such as 1, 2, 3, or 4, that you use to rate a worker.

For rating models that are used by Oracle Fusion Performance Management, you must:

- Define numeric ratings, particularly for rating models in performance documents that use calculated ratings.
- Define rating levels using whole numbers, with the highest number indicating the best rating. Rating levels determine high and low ratings in the analytics.

## Review Points

Define review points for rating models in performance documents that use the average, sum, or band calculation method. The review points and point ranges that you define for the rating model are used to calculate ratings.

## Rating Categories

Using rating categories you can group rating levels together for analysis tools used in the talent review process, such as the box chart that is used in the talent review process. You can group rating levels into categories such as low, medium, and high, and those categories then become the labels for the analytic. You should not change rating categories after setting them up, as the changes could affect the analytic.

## Distributions

Oracle Fusion Compensation Management and Oracle Fusion Performance Management both use rating model distributions to determine the targeted minimum and maximum percentage of workers that should be given each rating level. Compensation Management uses the distribution values that you set up directly on rating models. However, you can set up distributions using the Manage Target Ratings Distribution task for rating models that are used in Performance Management.

### Related Topics

- [Box Chart Matrix Options](#)
- [How You Update Talent Ratings](#)

## 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 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
<b>No Sections</b>	One section appears that contains all questions.
<b>Stack Regions</b>	Multiple sections appear as specified on the <b>Section Order</b> option.

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

Value	Description
<b>Sequential</b>	One section appears that contains all questions.
<b>Random</b>	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
<b>Vertical</b>	Questions appear in the specified order.
<b>Random</b>	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 deactivate the 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?	<ul style="list-style-type: none"><li>• Date</li><li>• Plain Text Box</li><li>• Rich Text Box</li></ul>	The class is too long and should be broken into 2 half-day classes.	<p>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.</p> <p>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.</p>
Single Choice	Respondent chooses only one correct answer.	Is Performance Management a subscriber application for questionnaires?	<ul style="list-style-type: none"><li>• Single Choice from List</li><li>• Radio Button List</li></ul>	Yes	

Type	Description	Sample Question	Response Type	Sample Response	Notes
			<ul style="list-style-type: none"> <li>• Radio Button with Image</li> <li>• Single Choice – Horizontal Buttons (applicable only for Touchpoints and Journeys Surveys subscribers)</li> </ul>		
Multiple Choice	Respondent can choose more than one answer.	Which applications are subscriber applications for questionnaires?	<ul style="list-style-type: none"> <li>• Check Multiple Choices</li> <li>• Check Box with Image</li> <li>• Multiple Choices from List</li> <li>• Multiple Choice – Horizontal Buttons (applicable only for Touchpoints and Journeys Surveys subscribers)</li> </ul>	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 side 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 Details	Notes	Sample Information
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 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

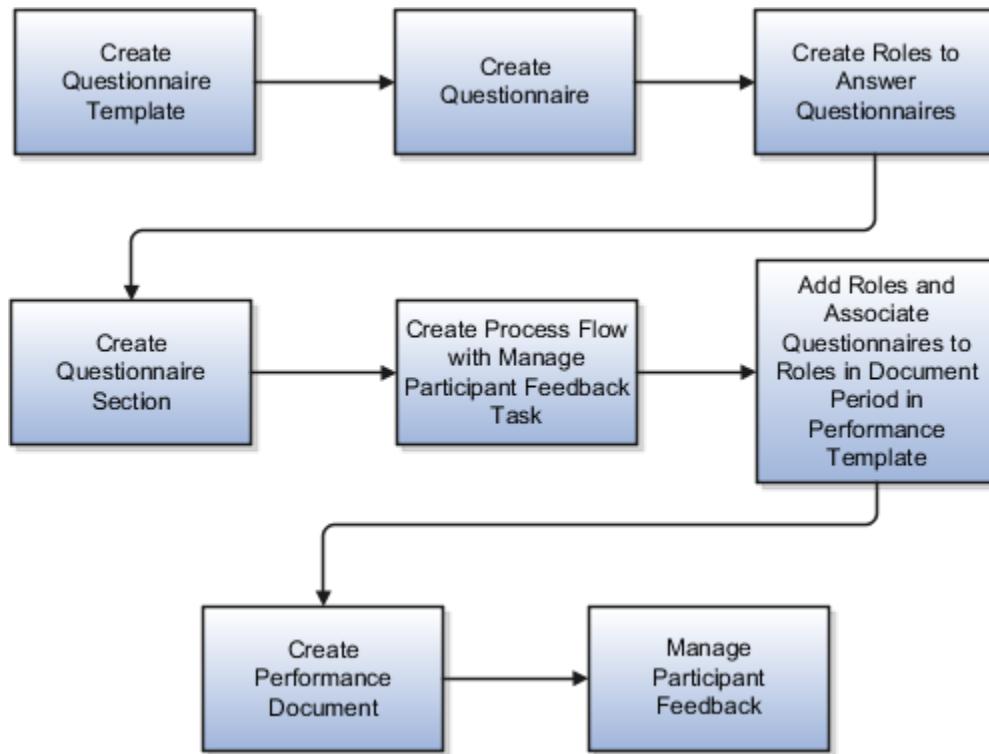
You can set up questionnaires to target general audiences, or specific groups, such as managers, workers, peers or other roles. You must associate questionnaires with performance template periods, and assign the roles that respond to the questionnaire. This enables you to create questionnaires that concentrate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

# 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

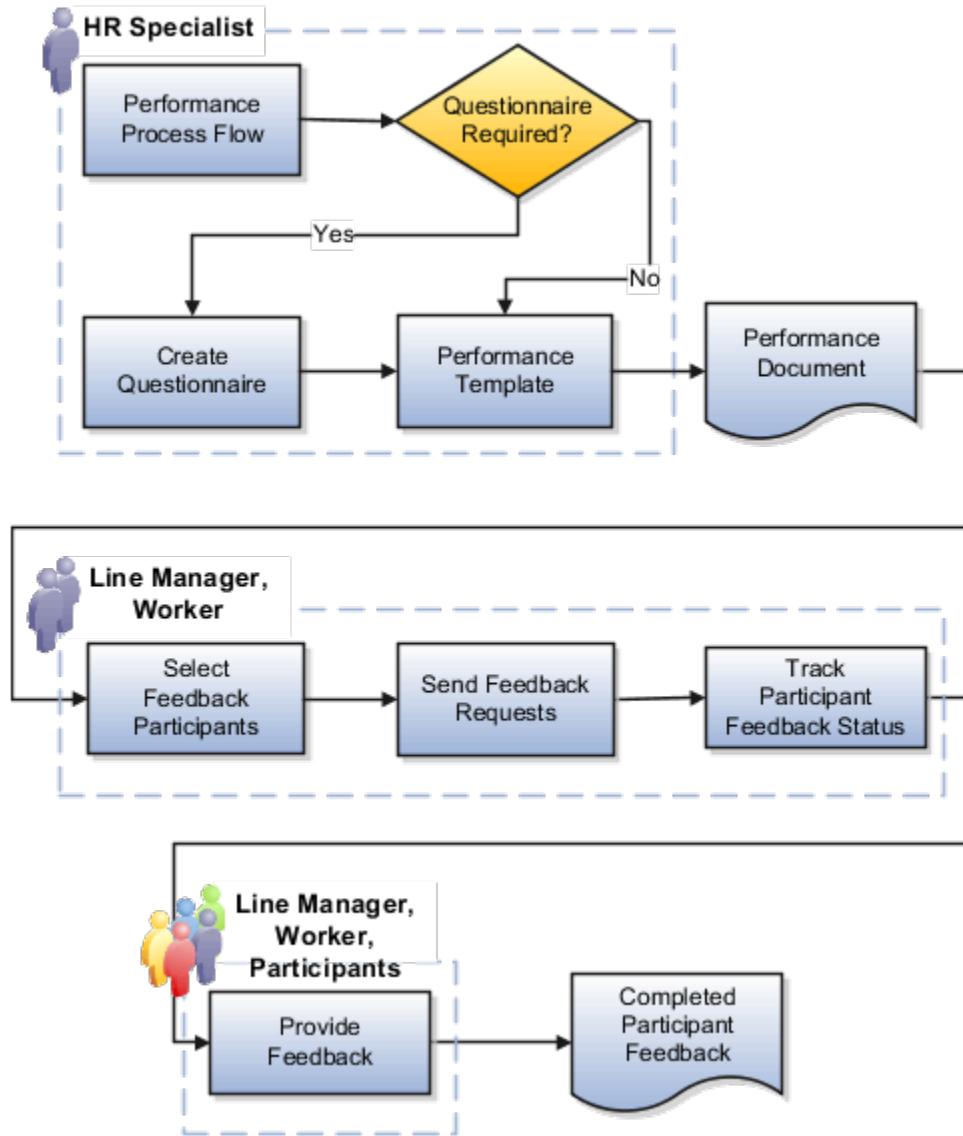
The Manage Participant Feedback task enables individuals other than the line manager and worker to provide direct feedback into the worker's performance document. Additional roles providing feedback might include peers, mentors, customers, and other managers, such as matrix managers.

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.

# Matrix Management

## 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 <b>Auto-populate matrix managers of the worker as participants</b> 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'.

Option	Impact
	<p>If selected, managers can assign any role to a participant in the Manage Participant Feedback page.</p> <p>If not selected, any participant roles configured in this template aren't available for managers to select in the Manage Participant Feedback page.</p>

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	<b>Yes</b> , to share ratings with employee	<b>Yes</b> , to share comments with employee	<ul style="list-style-type: none"> <li><input type="radio"/> <b>Yes</b>: To let manager view participant name</li> <li><input type="radio"/> <b>No</b>: To display participants only as <b>Participant</b></li> </ul>	<ul style="list-style-type: none"> <li><input type="radio"/> <b>Yes</b>: To let manager view participant role</li> <li><input type="radio"/> <b>No</b>: To display participant roles as <b>Participant</b></li> </ul>
Worker	By default, this is <b>Yes</b> . You can't change this value.	By default, this is <b>Yes</b> . You can't change this value.	<ul style="list-style-type: none"> <li><input type="radio"/> <b>Yes</b>: To let employee view participant name</li> <li><input type="radio"/> <b>No</b>: To display participants only as <b>Participant</b></li> </ul>	<ul style="list-style-type: none"> <li><input type="radio"/> <b>Yes</b>: To let employee view participant name</li> <li><input type="radio"/> <b>No</b>: To display participants only as <b>Participant</b></li> </ul>
Matrix Manager	<b>Yes</b> , to share ratings with employee	<b>Yes</b> , to share comments with employee	Inherits Manager setting	Inherits Manager setting
Participants	<b>Yes</b> , to share ratings with employee	<b>Yes</b> , 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](#)

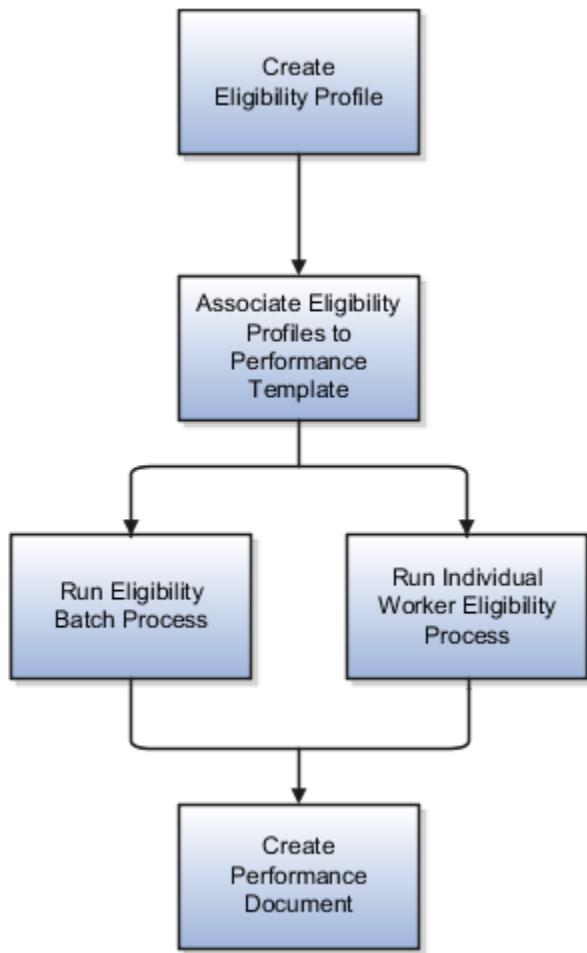
## Eligibility Profiles

### 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](#)

## 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	<p>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.</p> <p>For scheduled processes, select <b>Current Date</b> to use the system date every time the process runs.</p>
Review Period	<p>This is a mandatory parameter. Using this, you can find a performance document or check-in template that matches the selected review period.</p> <p>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.</p> <p><b>Note:</b> 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.</p>
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	<p>If you select this, the application automatically creates performance documents for each eligible employee.</p> <p>This field only applies when running the eligibility process for performance documents:</p> <p>The <b>Maximum Number of Concurrent Threads for Performance Document Creation</b> 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.</p>
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.

## Process Flow Definitions

### 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	<p>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.</p> <p>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.</p>

Task	Subtask	Role that Performs Task	Task Function
Worker Self-Evaluation	Subtask 1: Track Worker Self-Evaluation  Subtask 2: Worker Self-Evaluation	Subtask 1: Manager  Subtask 2: Worker	<p>Worker evaluates self. Worker can also add content to be rated to the performance document. The manager:</p> <ul style="list-style-type: none"> <li>• Can track the worker self-evaluation to view any changes the worker makes to the performance document</li> <li>• Can't view the ratings and comments the worker provides until the worker completes the subtask</li> </ul>
Manager Evaluation of Worker	N/A	Manager	<p>Manager evaluates worker. Manager can also add content to be rated to the performance document.</p> <p>Select <b>Do not allow additional edit of manager evaluation task when completed</b> to prevent managers from updating ratings and comments once they submit the task.</p>
Participant Feedback	N/A	Manager, worker, or both	<p>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.</p>
First Approval	N/A	Manager	<p>First task for the approver to approve the performance document of the worker at one stage of the evaluation.</p> <p>Select <b>Automatically submit approvals when preceding task is completed</b> 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</p>
Second Approval	N/A	Manager	Second task for the approver to approve the performance

Task	Subtask	Role that Performs Task	Task Function
			document of the worker at a later stage of the evaluation.
Share Performance Document	Subtask 1: Share Performance Document  Subtask 2: Acknowledge Document	Subtask 1: Manager  Subtask 2: Employee	<p>The manager shares the document so the employee can view the manager's ratings and comments and acknowledge it.</p> <p>Managers can do any of these actions:</p> <ul style="list-style-type: none"> <li>Share the document with the employee while continuing to edit it.</li> <li>Release the document to the employee and no longer edit it.</li> </ul> <p>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.</p> <p>The settings in the performance template determine which of the manager's ratings and comments an employee can see on the shared performance document.</p>
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	<p>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.</p> <p>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,</p>

Task	Subtask	Role that Performs Task	Task Function
			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

Task Order	Default Task Name	New Task Name	Default Subtask Name	New Subtask Name	Roles
30	Manager Evaluates Worker	Evaluate Employee	N/A	N/A	Manager
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

Task Order	Task	Subtask	Roles
20	First Approval	N/A	Manager
30	Share Performance Document	Subtask 1: Share Performance Document Subtask 2: Worker Acknowledges Document	Subtask 1: Manager Subtask 2: Worker

## Participant Feedback Task Options

The HR specialist 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 supply 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

HR can set this up without any special configuration, just by checking a box. You set up the process flows from **My Client Groups > Performance > Performance Process Flow** (under the Setup Maintenance area). To create a new performance process flow, click **Add**. You can also search for an existing performance process flow.

### 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. You configure performance templates using the **Performance Templates** task in the Setup and Maintenance area.

### 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

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 manager evaluation is visible** 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.

## 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 select a check box for workers, managers, HR specialists, and participants to enable to reopen submitted feedback in the Participant Feedback region in the Process Flow page in the Setup Maintenance area. 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 check box 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.

## 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 must be configured to allow concurrent evaluations to use the feature. 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. Go to **My Client Groups > Performance**. In the **Setup Maintenance** area, select **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 page, which is configured in the Setup and Maintenance work area.

# 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 them 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.

## 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.

## 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
<b>Share Performance Document</b> task is included in process flow	Employees can view performance ratings and comments when the manager clicks either of these buttons: <ul style="list-style-type: none"><li>• <b>Share and Edit</b></li><li>• <b>Share and Release</b></li></ul>
<b>First Approval</b> and <b>Manager Evaluation of Workers</b> tasks are included in process flow; <b>Share Performance Document</b> task isn't included	<ul style="list-style-type: none"><li>• If you place the <b>First Approval</b> task after the <b>Manager Evaluation of Workers</b> task, employees can view performance ratings and comments when the approval task is completed.</li><li>• If you place the <b>First Approval</b> task before the <b>Manager Evaluation of Workers</b> task, employees can view performance ratings and comments when the <b>Manager Evaluation of Workers</b> task is completed.</li></ul>
<b>Manager Evaluation of Workers</b> task is included in process flow; <b>Share Performance Document</b> and <b>First Approval</b> tasks aren't included	Employees can view performance ratings and comments when the <b>Manager Evaluation of Workers</b> 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 tab of the performance template.
- You create and edit performance templates using the **Performance Templates** task in the Setup and Maintenance work area or on the administrator's Performance page.

On the Structure tab, 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
3. **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. The process flow is used by a performance template to create performance documents.

The status of tasks and subtasks determines the completion status of the entire performance document.

### Settings That Affect Performance Document Completion Status

Each task and subtask has a status. For example, the Set Goals task can be not started, in progress, or completed. 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 In progress Completed	No
	Manager		
Worker Self-Evaluation	Worker	Not started In progress Completed	No
Manager Evaluation of Worker	Manager	Not started In progress Completed	No
Manage Participant Feedback	Worker	Not started	Yes
	Manager	In progress	

Task	Roles	Valid Statuses	Has Subtasks?
		Completed	
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 application 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

Document Status	What the Status Means
In progress	At least one of the following tasks are in progress or completed: Set Goals, 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, excluding Set Next Period Goals
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

Subtask Status: Worker Final Feedback	Subtask Status: Manager Final Feedback	Task Status: Final Feedback
Completed	In progress	In progress
Completed	Completed	Completed

## 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: <ul style="list-style-type: none"><li>Profile Content (for Competencies)</li><li>Performance Goals</li><li>Development Goals</li></ul>
Worker Self-Evaluation	At least one of: <ul style="list-style-type: none"><li>Profile Content (for Competencies)</li><li>Performance Goals</li><li>Development Goals</li><li>Overall Summary</li></ul>
Manager Evaluations of Workers	At least one of: <ul style="list-style-type: none"><li>Profile Content (for Competencies)</li><li>Performance Goals</li><li>Development Goals</li><li>Overall Summary</li></ul>
Manage Participant Feedback	At least one of: <ul style="list-style-type: none"><li>Profile Content (for Competencies)</li><li>Performance Goals</li><li>Development Goals</li><li>Overall Summary</li><li>Questionnaire</li></ul>
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.

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

## Populate Performance Documents With Person Profile Competencies

You can configure a competencies section in a performance template 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.

### Before you start

- Set the ORA\_HRA\_PERSON\_PROFILE\_COMP\_SECTION\_ENABLED profile option to Yes.

### Here's what to do

1. Navigate to **My Client Groups > Performance Templates**.
2. Create a performance template.
3. In the Structure tab, create a section to include a Competencies section type.
4. 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 is visible to both employees and managers.
  - b. The competency section defined in Profile Management must be associated with an Item Value Set and have at least one Evaluator Type configured that is visible to both employees and managers.
5. In the 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.
6. Complete details in the **Processing By Role** section.

## 7. Save the performance template.

Here are some things to consider when adding or removing competencies:

- When you add or remove a competency from an employee's person profile, any in progress performance documents are automatically updated. There's no need to manually update the performance document.
- 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.
- 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.

## Calculated Ratings

You can set up calculated ratings to automatically calculate ratings in performance documents. The application can calculate the overall performance rating in the Overall Summary section, and section ratings in the Profile Content, Performance Goals, and Development Goals sections.

The calculated rating derives from a score calculated from ratings provided by workers, managers, and participants using the calculation rules defined in the sections. The application maps the calculated score 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 click the calculator icon 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 are not 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 business process. 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, the application:

- Uses the ratings that managers, workers, and matrix managers and other participants provide on individual items in the section
- Performs roll-up calculations to determine the rating for the respective section automatically
- Uses the calculated ratings for the Profile Content, Performance Goals, and Development Goals sections 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. To configure a template, use the Performance Templates task in the Setup and Maintenance work area. Go to **My Client Groups > Performance > Setup Maintenance > Performance Templates**.

You can also configure sections using the Manage Performance Template Sections task. Go to **My Client Groups > Performance > Setup Maintenance > Performance Template Sections**.

## Calculated Ratings Activation and Display Options

On the Process tab 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**, and **Band**. You can specify the calculation rules either using the Manage 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 application uses the calculation rules for the Overall Summary section 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
<b>Standard</b>	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.
<b>Up</b>	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.
<b>Down</b>	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
<b>Highest</b>	Uses the next numeric rating greater than the calculated average.	Uses the next review point greater than the calculated average.
<b>Lowest</b>	Uses the next numeric rating less than the calculated average.	Uses the next review point less than the calculated average.
<b>Nearest</b>	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.

For the points range mapping metric, the application:

- Calculates the total numeric score using the numeric ratings defined in the rating model
- 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. The application:

- Uses the numeric ratings as defined in the rating model
- Calculates the total numeric score
- Converts this total into the corresponding review rating for the section by mapping the total numeric score to a rating level
- Ignores items without ratings

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

For points range metric mapping, the application:

- Uses the numeric ratings as defined in the rating model
- Calculates the total numeric score
- Converts this total into the corresponding review rating for the section by mapping the total numeric score to the points range
- 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 is associated with the Overall Summary section must define review points as well as point ranges (from points and to points).

During the calculation process, the application:

- Calculates the total numeric score across all sections
- Maps this total into the equivalent rating level using the points range

For numeric rating metric mapping, the application:

- Calculates the total numeric score across all sections
- Converts this total 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 application:

- Calculates the total numeric score based on the fast formula
- Maps the score to the rating level

For the points range mapping metric, the application:

- Calculates the total numeric score based on the fast formula
- Maps this total into 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 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 multiples 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
<b>Target Proficiency Level</b>	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.
<b>Target Performance Rating</b>	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.
<b>Weight</b>	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: <ul style="list-style-type: none"><li>• Items they add to the document</li><li>• Performance goals added from the goal management business process</li><li>• Development goals added from the career development business process</li></ul> When using calculated ratings, the weights are used only when you select the Average calculation rule for the section.
<b>Minimum Weight</b>	You can enter minimum weights for items in the performance template.

Property	Effect
	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 in the performance document. The minimum weights you enter for competencies in model profiles which are used to populate the performance document also display.
<b>Required</b>	In the performance template section or the performance template, select the <b>Required</b> 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

The application can calculate ratings for each section and the overall rating using the average calculation rule. You can use the average rule to 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 application first calculates the average of the content item ratings to work out the section rating. The application then calculates the average of the section ratings to determine the overall rating. The application calculates ratings using precise values throughout the calculation process, and applies rounding 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:

$(\text{Total Decimal Score}) / (\text{Total Maximum Decimal Score}) \times (\text{Maximum Numeric Rating from Section Rating Model})$ , 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 application calculates the average numeric rating for the two sections. 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. The application validates that the:

- 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
Cut expenses	3	5	0.6	30	18.0

Goal	Item Numeric Rating	Maximum Numeric Rating from Rating Model	Decimal Score (Item Rating / Maximum Rating)	Weight	Weighted Score (Decimal Score x Weight)
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 application calculates the sum of the numeric ratings for the two weighted sections, then converts the score to the rating model scale. ABC sets the Competencies section weight to 40, and the Performance Goals section weight to 60. First, the application calculates the decimal scores of the weighted sections:

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

The application then calculates the weighted scores for each section, and adds them 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 application converts the scores 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 application applies the maximum numeric rating from each rating model 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:

$(\text{Weighted Score}) / (\text{Total Maximum Weighted Score}) \times (\text{Maximum Numeric Rating from Section Rating Model})$ , 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 application calculates the sum of the numeric ratings for the two weighted sections, then 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 application calculates the decimal scores of the weighted sections:

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

The application then calculates the weighted scores for each section, then adds them 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 application converts the scores 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

The application can calculate 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 application calculates the sum of the section rating. For the overall rating, the application converts the numeric rating total from the sections 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 application calculates the sum of the item rating scores:  $4 + 3 + 2 + 4 + 5 + 4 = 22$ . To determine the section rating, the application uses the mapping rules for the rating model assigned in the performance template. 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 application uses the mapping rules for the rating model assigned in the performance template. 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 application calculates the sum of the numeric ratings for the Competencies and Performance Goals sections:  $20 + 4 = 24$ , 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.

## 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.

The following table summarizes key decisions for this scenario.

Decisions to Consider	In This Example
What type of section is this?	Profile Content section, for competencies
Calculate section ratings? With which calculation rule?	Yes, the section uses the Average calculation rule
Which section rating model is used?	Any
Weight the section?	Yes, the weight complements the Performance Goals and Development Goals section weights so the sum of the sections is 100
Enable content items for the section?	Yes
Rate content items?	Yes, using the proficiency rating type, and section rating model
What properties are included with the content items?	<b>Weight, Required, Target Proficiency Level</b>
What is the source of competencies for the content items?	Worker job profile
Do you require any content items to be added to the section?	Yes, one content item is required
Enable the writing assistant to suggest comments managers can add for competencies?	Yes

To create a performance template section for Profile Content, follow these steps:

1. Go to the Setup and Maintenance work area, and select **Workforce Development** from the Setup list.
2. Search for the **Performance Template Sections** task and select it.
3. Click **Create** in the Performance Template Sections page.
4. Complete each section as described below.

## Section Details

1. In the **Section Details** section, complete the fields as shown in this table.

Field	Value
<b>Name</b>	Competencies
<b>Description</b>	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.
<b>From Date</b>	01/01/2017
<b>To Date</b>	12/31/2021
<b>Status</b>	Active

2. Click **Save**.

## Section Processing Details

1. In the **Section Processing** section, complete the fields, as shown in this table.

Field	Value
<b>Section Type</b>	Profile Content
<b>Section Rating Model</b>	Any
<b>Rate Section</b>	Select
<b>Calculation Rule for Section</b>	Average
<b>Decimal Places</b>	2
<b>Decimal Rounding Rule</b>	Standard
<b>Mapping Metric</b>	Numeric Rating
<b>Mapping Method</b>	Nearest

Field	Value
<b>Enable section comments</b>	Select
<b>Weight section</b>	Select
<b>Item Weight</b>	40

2. Click **Save**.

## Item Processing Details

1. In the **Item Processing** section, complete the fields, as shown in this table. Use the default values except where indicated.

Field	Value
<b>Enable items</b>	Select
<b>Rate items</b>	Select
<b>Rating Type</b>	Proficiency
<b>Use section rating model for performance rating</b>	Select
<b>Performance Rating Model</b>	Any
<b>Item Calculation</b>	Proficiency
<b>Enable item comments</b>	Select
<b>Target Proficiency Level</b>	Select
<b>Target Performance Rating</b>	Select
<b>Minimum Weight</b>	Select
<b>Weight</b>	Select

Field	Value
<b>Required</b>	Select

2. Click **Save**.

## Section Content Details

1. In the **Section Content** section, complete the fields, as shown in this table. Use the default values except where indicated.

Field	Value
<b>Use profile related to worker's job data</b>	Select
<b>Profile Type</b>	Job profile type
<b>Use specific content items</b>	Select
<b>Enable writing assistant for manager</b>	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
<b>Item Name</b>	Any
<b>Target Proficiency Level</b>	Any
<b>Weight</b>	Any
<b>Required</b>	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.

The following table summarizes key decisions for this scenario.

Decisions to Consider	In This Example
What type of section is this?	Performance Goals
Calculate the section rating? With which calculation rule?	Yes, the section uses the Average calculation rule
Which section rating model?	Any
Weight the section?	Yes, the weight should complement the Competencies section weights so the sum of the sections is 100
Enable content items for the section?	Yes
Give workers and managers the opportunity to add performance goals during the Set Goals task, if that task is included in the process flow?	Yes
Rate content items?	Yes, using the Performance rating type, and the same rating model as the section uses
What properties are included with the content items?	Weight, Required, Target Performance Level
What is the source of performance goals for the content items?	Oracle Fusion Goal Management
Add content items to the section?	Yes, add one content item.

To create a performance template section for Performance Goals, follow these steps:

1. Go to the Setup and Maintenance work area, and select **Workforce Development** from the Setup list.
2. Search for the **Performance Template Sections** task and select it.
3. Click **Create** in the Performance Template Sections page.
4. Complete each section as described below.

## Section Details

1. In the **Section Details** section, complete the fields as shown in this table.

Field	Value
<b>Name</b>	Performance Goals
<b>Description</b>	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.
<b>From Date</b>	01/01/2017
<b>To Date</b>	12/31/2021
<b>Status</b>	Active

2. Click **Save**.

## Section Processing Details

1. In the **Section Processing** section, complete the fields as shown in this table.

Field	Value
<b>Section Type</b>	Performance Goals
<b>Section Rating Model</b>	Any
<b>Rate Section</b>	Select
<b>Calculation Rule for Section</b>	Average
<b>Decimal Places</b>	2
<b>Decimal Rounding Rule</b>	Standard
<b>Mapping Metric</b>	Numeric Rating
<b>Mapping Method</b>	Nearest

Field	Value
<b>Enable section comments</b>	Select
<b>Weight section</b>	Select
<b>Section Weight</b>	60

2. Click **Save**.

## Item Processing Details

1. In the **Item Processing** section, complete the fields as shown in this table. Use the default values except where indicated.

Field	Value
<b>Enable items</b>	Select
<b>Rate items</b>	Select
<b>Rating Type</b>	Performance
<b>Use section rating model for performance rating</b>	Select
<b>Performance Rating Model</b>	Any
<b>Item Calculation</b>	Performance
<b>Enable item comments</b>	Select
<b>Target Performance Rating</b>	Select
<b>Minimum Weight</b>	Select
<b>Weight</b>	Select
<b>Required</b>	Select

Field	Value

2. Click **Save**.

## Section Content Details

1. In the **Section Content** section, complete the fields as shown in this table. Use the default values except where indicated.

Field	Value
<b>Populate with Worker Performance Goals</b>	Select
<b>Allow update goals action to update goal weights from goal management business process</b>	Select
<b>Use specific content items</b>	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
<b>Item Name</b>	Any
<b>Performance Rating Model</b>	Any
<b>Target Performance Rating</b>	Any
<b>Weight</b>	Any
<b>Minimum Weight</b>	Any
<b>Required</b>	Select

4. Click **Save**.

# 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](#)

# 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](#)

## 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](#)

## 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**.

## 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 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 to 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 a 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](#)

## 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
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

Decisions to Consider	In This Example
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

Field	Value
<b>Name</b>	Annual Performance Evaluation
<b>Comments</b>	This template is used for an annual performance evaluation.
<b>From Date</b>	01/1/17
<b>To Date</b>	12/31/21
<b>Status</b>	Active
<b>Document Type</b>	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
<b>Eligibility Profile</b>	Any
<b>Required</b>	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
<b>Set the minimum number for each role check box</b>	Select
<b>Total minimum number of participants required in the document</b>	2

Field	Value

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
<b>Process Flow</b>	The process flow you created as a prerequisite for this task.
<b>Calculate ratings</b>	Select
<b>Display star ratings</b>	Select
<b>Include digital signature</b>	Select
<b>Display feedback notes</b>	Select
<b>Display requested feedback</b>	Select
<b>Participant feedback is required</b>	Select
<b>Worker can view participants added by manager</b>	Select
<b>Auto-populate matrix managers of the worker as participants</b>	Select
<b>Default participant role</b>	Matrix Manager
<b>Allow matrix managers to access worker document automatically</b>	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
<b>Section Type</b>	Profile Content
<b>Section Rating Model</b>	Any
<b>Rate Section</b>	Select
<b>Enable manual section rating</b>	Select
<b>Calculation Rule for Section</b>	Average
<b>Decimal Places</b>	2
<b>Decimal Rounding Rule</b>	Standard
<b>Mapping Metric</b>	Numeric Rating
<b>Mapping Method</b>	Nearest
<b>Enable section comments</b>	Select
<b>Enable section weights</b>	Select

Field	Value
<b>Section Weight</b>	40
<b>Section Minimum Weight</b>	10

4. In the Item Processing section, complete the fields as shown in this table. Use the default values except where indicated.

Field	Value
<b>Enable items</b>	Select
<b>Enable ratings for items</b>	Select
<b>Rating Type</b>	Proficiency
<b>Use section rating model for performance rating</b>	Select
<b>Performance Rating Model</b>	Any
<b>Item Calculation</b>	Any
<b>Enable item comments</b>	Select
<b>Target Performance Rating</b>	Select
<b>Weight</b>	Select
<b>Required</b>	Select
<b>Target Proficiency Level</b>	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
<b>Role</b>	Manager
<b>Item Ratings</b>	Optional With Warning
<b>Item Comments</b>	Optional With Warning
<b>Section Ratings</b>	Optional With Warning
<b>Section Comments</b>	Optional With Warning
<b>Share Ratings</b>	Yes
<b>Share Comments</b>	Yes
<b>Update Profile</b>	Yes
<b>Instance Qualifier</b>	Supervisor
<b>View Participant Names</b>	Yes
<b>View Participant Roles</b>	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
<b>Role</b>	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
<b>Section Type</b>	Performance Goals
<b>Section Rating Model</b>	Any
<b>Rate Section</b>	Select
<b>Calculation Rule for Section</b>	Average
<b>Decimal Places</b>	2
<b>Decimal Rounding Rule</b>	Standard
<b>Mapping Metric</b>	Numeric Rating
<b>Mapping Method</b>	Nearest
<b>Enable section comments</b>	Select
<b>Weight section</b>	Select
<b>Section Weight</b>	60

4. In the Item Processing section, complete the fields as shown in this table. Use the default values except where indicated.

Field	Value
<b>Enable items</b>	Select
<b>Rate items</b>	Select
<b>Rating Type</b>	Performance

Field	Value
<b>Use section rating model for performance rating</b>	Select
<b>Performance Rating Model</b>	Any
<b>Item Calculation</b>	Performance
<b>Enable item comments</b>	Select
<b>Target Performance Rating</b>	Select
<b>Minimum Weight</b>	Select
<b>Weight</b>	Select
<b>Required</b>	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
<b>Role</b>	Manager
<b>Share Ratings</b>	Yes
<b>Share Comments</b>	Yes
<b>Update Profile</b>	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
<b>Role</b>	Worker

Field	Value

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
<b>Role</b>	Manager
<b>Manager Questionnaire Can Be Viewed by the Role</b>	Yes
<b>Worker Questionnaire Can Be Viewed by the Role</b>	Yes
<b>Participant Questionnaire Can Be Viewed by the Role</b>	Yes
<b>Participant Name Can Be Viewed by the Role</b>	Yes
<b>Participant Role Can be Viewed by the Role</b>	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
<b>Role</b>	Worker
<b>Manager Questionnaire Can Be Viewed by the Role</b>	No

Field	Value
<b>Worker Questionnaire Can Be Viewed by the Role</b>	Yes
<b>Participant Questionnaire Can Be Viewed by the Role</b>	No
<b>Participant Name Can Be Viewed by the Role</b>	No
<b>Participant Role Can be Viewed by the Role</b>	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
<b>Role</b>	Colleague
<b>Participant Role Can Enter Comments Visible to Worker</b>	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
<b>Section Type</b>	Overall Summary
<b>Rate Section</b>	Select

Field	Value
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
<b>Section Name</b>	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
<b>Item Name</b>	Any

4. In the Details section, complete the fields as shown in this table. Use the default values except where indicated.

Field	Value
<b>Target Proficiency Level</b>	Any
<b>Performance Rating Model</b>	Any
<b>Required</b>	Select

5. On the Content tab, complete the fields as shown in this table.

Field	Value
<b>Section Name</b>	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
<b>Item Name</b>	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
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
<b>Set Goals</b>	6/24/17
<b>Worker Self-Evaluation</b>	7/1/17
<b>Manager Evaluation of Workers</b>	7/8/17
<b>First Approval</b>	7/15/17
<b>Share Performance Documents</b>	7/20/17
<b>Conduct Meetings</b>	7/25/17
<b>Provide Final Feedback</b>	7/30/17
<b>Set Next Period Goals</b>	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
<b>Template Role</b>	Manager
<b>Questionnaire Name</b>	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
<b>Name</b>	2017 Performance Evaluation Second Half
<b>Review Period</b>	FY2017
<b>From Date</b>	7/1/17

Field	Value
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
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

Implementors 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.
  - o 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.
  - o 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.

## 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:
  - o Display calculated ratings to worker
  - o Display calculated ratings to participants
  - o Display calculated ratings to manager
  - o 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:
  - o Profile Content (Competencies)
  - o Performance Goals or Development Goals
  - o 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**.
  - b. In the **Name** field, enter a name for the first quarter performance document.
  - c. Select a **Review Period**. The review period must be the same used for the annual performance period.
  - d. Edit the performance document start and end dates, if required for your business process.
  - e. Enter a **Short Name** for the period.
  - f. Select the **Available to Use** check box.
  - g. Select the **Lock Manager Share Task** check box if you don't want managers to share the document with employees during the calibration period.
  - h. Add eligibility profiles and select roles and questionnaires as required for your business process.
  - i. Enter the **Due Date** for each task.
8. Set up the document period for the second quarter evaluation.
  - a. In the Document Periods section, click **Add**.
  - b. In the **Name** field, enter a name for the second quarter performance document.
  - c. Repeat steps 7c through 7g for the period. The short name must be unique for each period.
  - d. In the Document Types section, click **Add**.
  - e. In the **Document Type** field, select **Annual and Quarterly** so the ratings and comments from the first quarter document appear in the document.
9. Set up the document period for the third quarter evaluation using the following steps.
  - a. In the Document Periods section, click **Add**.
  - b. In the **Name** field, enter a name for the third quarter performance document.
  - c. Repeat steps 7c through 7g for the period.
10. Set up the document period for the annual evaluation.
  - a. In the Document Periods section, click **Add**.

- b. In the **Name** field, enter a name for the annual performance document.
- c. Repeat steps 7c through 7g for the period.
- d. In the Document Types period, click **Add**.
- e. In the **Document Type** field, select **Annual and Quarterly** so the ratings and comments from each preceding quarter appear in the annual document.
- f. In the Document Types period, click **Add**.
- g. In the **Document Type** field, select **Project Evaluation** so the ratings and comments from the project evaluation appear in the annual document.

11. Click the **Summary** tab.

12. Review the template and click **Save and Close**.

13. Click **OK**.

# FAQs for Performance Templates

## What happens when I duplicate a performance template?

To duplicate a performance 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**.

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.

# 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.
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](#)

## 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.
  - o Department - Specific department to which the employees belong.
  - o Manager Person Number - Person number of a specific manager.
  - o 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.

## 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.

## What happens if I change the review period in a check-in template that's in use?

The users can create check-in documents with the associated review periods.

The already created check-in documents have no impact with the change in template.

## Can I dissociate the check-in template with associated review periods?

Yes you can. The already created check-in documents have no impact with the change in template.

## Feedback Templates

### 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

## Can I change the questionnaire in the Feedback template?

Yes, if the feedback template isn't in use.

## Can I delete a feedback template?

Yes, if the feedback template isn't in use.