Oracle Fusion Cloud Talent Management

How do I configure performance documents for matrix management?

Oracle Fusion Cloud Talent Management
How do I configure performance documents for matrix management?

G19559-03

Author: Lakshmi VR and Priya Muralimohan

Contents

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

Increase your knowledge of Oracle Cloud by taking courses at *Oracle University*.

Join Our Community

Use *Cloud Customer Connect* to get information from industry experts at Oracle and in the partner community. You can join forums to connect with other customers, post questions, suggest *ideas* for product enhancements, and watch events.

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.

Share Your Feedback

We welcome your feedback about Oracle Applications user assistance. If you need clarification, find an error, or just want to tell us what you found helpful, we'd like to hear from you.

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

Thanks for helping us improve our user assistance!

1 Introduction

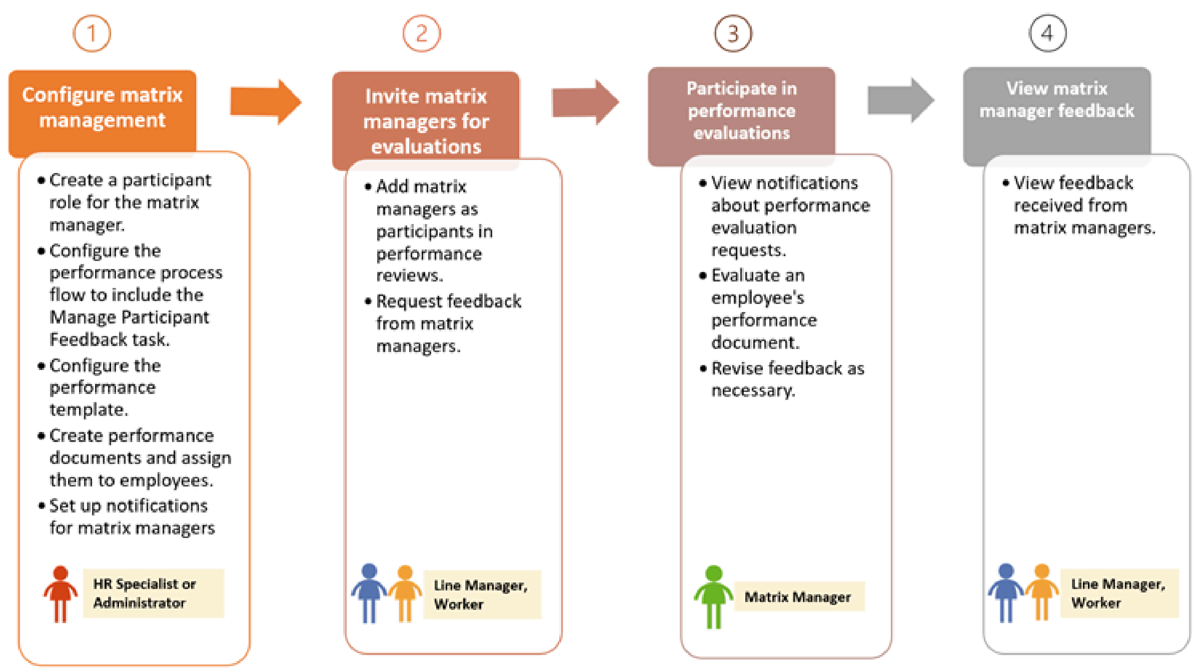
Scope of this Playbook

Based on your role, you can use this playbook to configure and use matrix management in your organization as part of the performance evaluation process.

- As an HR specialist, you can set up performance documents to automatically include matrix managers and assign the documents to employees for a performance evaluation.
- As a line manager or employee, you can invite matrix managers as review participants in the evaluation process.
- As a matrix manager, you can evaluate employees by providing feedback and ratings.

Matrix Management Workflow

At a high level, these are the workflow steps each user needs to perform to set up and use matrix management in performance evaluations.



This table outlines the steps depicted in the image here, along with each role that performs the steps.

Workflow Step	Performed by Role	Tasks
Configure matrix management	HR Specialist or Administrator	• *Create a Participant Role for the Matrix Manager* • *Include the Participant Feedback Task in the Performance Process Flow* • *Configure the General Step* • *Create Standard Performance Documents and Assign Them to Employees* • *Set Up Notifications for Matrix Managers*
Invite matrix managers to evaluate standard performance documents	• Line Manager • Worker	• *Add Matrix Managers as Participants in Performance Reviews*
Participate in performance evaluations	Matrix Manager	• *Matrix Manager Tasks in a Performance Evaluation* • *Evaluate an Employee's Standard Performance Document* • *Revise Your Evaluation*
View matrix manager feedback	Line Manager or Worker	• *View a Matrix Manager's Evaluation*

2 Before You Start

Case Study

In this playbook, a case study is used to define the scope of the implementation tasks and illustrate their interdependence.

The case study is based on a fictitious company named Vision Corp, a leading provider of software products. Employees are assigned to different projects and report not only to a line manager but also to project managers who handle different components of a product. These project managers are referred to as matrix managers in this playbook.

In 2024, Vision Corporation would like to implement a comprehensive performance review in their company. They think this will allow other managers of the employee such as project managers to evaluate and submit their ratings and comments during the annual performance review. The HR configures a performance template that automatically populates the project manager (matrix manager) as a participant in the performance evaluation process.

The following fictitious roles and users from Vision Corporation are used to illustrate the workflow steps in this case study.

Roles	Users
HR Specialist or Administrator	Scott Campbell
Line Manager	Elizabeth Mavery
Matrix Manager	Bonnie Vickers
Worker	Bala Gupta

Prerequisites

These prerequisites aren't covered in this case study but are required for the overall performance review process.

As an HR specialist or administrator, you need to not only understand but also be able to configure these features as required by your organization.

- Create at least one or more performance template sections, as required. We've referred to them as Competencies, Performance goals, Development goals, and Overall summary. You can name these sections as per your requirement. For more details, see Considerations for Creating Performance Template Sections.
- Create review periods for the performance template. The review period differs from organization to organization. In this case study, the current fiscal year is considered as the review period. For more details, see Review Periods in Talent Management.
- Create a performance document type to associate with your performance template. For more details, see Overview of Performance Document Types.

- Create an eligibility profile to control the availability of the standard performance documents to workers in a specific location, in this case US Location. For more details, see How You Use Eligibility Profiles with Performance Documents.
- Assign the appropriate role and work assignment to a matrix manager, such as a project manager or team lead, and assign the matrix manager to their indirect reports. For more details, see Matrix Manager for an Assignment.

3 Set Up Performance Management for Matrix Managers

Create a Participant Role for the Matrix Manager

HR specialists create participant roles that need to participate in the performance review process.

In this case, they create participant roles for the employee's peers and matrix managers since both these roles need to be able to evaluate the employee's standard performance document. Once defined, the roles must be selected in the standard performance document to be able to access various sections of the document. Sign in as HR specialist Scott Campbell to create a participant role.

1. Go to **My Client Groups > Performance > Setup Maintenance > Performance Roles**.
2. Create the performance role.
3. Enter a unique name for the performance role and a brief description.
4. From the Role Type list, select **Participant**, if not already selected.
5. In Role, enter **Project Manager** as the matrix manager's role. The role name can be any additional manager types who are expected to review employees.
6. In Description, enter **Project manager (matrix manager) role for accessing documents and providing feedback**.
7. In From Date, enter today's date.
8. In To Date, enter **12/31/2026**.
9. From the Status list, select **Active**, if not already selected.
10. Select **Allow role to view worker, manager, and participant ratings, comments, and questionnaires**. This allows the Project Manager matrix manager additional access as participant in a performance document to view the employee's own ratings and comments and those of the line manager performing the actual evaluation.
11. Repeat steps 4-10 to create the **Peer** role.
12. Click **Submit**.

Include the Participant Feedback Task in the Performance Process Flow

As an HR specialist or administrator, you must now configure a performance process flow in which you need to add the **Manage Participant Feedback** task.

Using this task, you can specify whether line managers, workers, or both, can select participants to provide feedback, add questions to the questionnaire, and track feedback request and completion status. When creating the performance template later, you'll need to include this process flow in the template. Continue to remain signed in as Scott Campbell, and use the following steps to create a performance process flow:

1. Go to **My Client Groups > Performance > Performance Process Flows > Add**
2. In the New Performance Process Flows page, enter **Performance Process Flow 2024** as the name of the process flow.

3. In Description, enter **Process Flow for 2024 Performance Evaluation**.
4. In From Date, enter **1/1/2024**.
5. In To Date, enter **12/31/2026**. These dates must be the same as or extend beyond the date range of the performance templates in which they're used.
6. From the Status list, select **Active**, if not already selected.
7. In the Worker Self-Evaluation and Manager Evaluation section, select these options:
    a. **Include worker self-evaluation task**: To let employees evaluate themselves.
    b. **Include manager evaluation of worker task**: To let line managers evaluate their direct report.
8. In the Participant Feedback section, select these options:
    a. **Include manage participant feedback task**, so that review participants, such as matrix managers or peers, can access the standard performance document.
    b. Select **Manager can select participant**, so that line managers can select review participants.
    c. Select **Participant can reopen submitted feedback** , so that participants such as peers or matrix managers can reopen feedback they submitted.
    d. Select **Manager can track participants** for line managers to see the status of the feedback request sent to the participant.
    e. Select **Worker can select participants** for employees to select participants.
9. In the Approval, Review and Meetings sections, select the options required for your business process.
10. Click **Task Names**.
11. Enter the sequence numbers and names for the tasks.
12. Click **Submit**.

Configure the General Step

As an HR specialist or administrator, you must configure a performance template for a standard performance document and add the participant roles that you created earlier.

In the General step, you need to add the matrix manager participant and peer roles that you created to the performance template.

1. Go to **My Client Groups > Performance > Performance Templates > Add**.
2. In the New Performance Template page, the template type is Standard by default.
3. Enter the name of the standard performance document as **Performance Evaluation US 2024** and optionally enter comments.
4. In From Date, enter **1/1/2024** and in To Date, enter **12/31/2026**. The From Date must be the same as or later than the From Date of the performance document type, process flow, roles, and sections used in the template. The To date must be the same as or earlier than the To Date used in these sections.
5. Set the Status to **Active**.
6. Select a document type that you need to associate to the performance template. This is the document type that you created using the Document Type task.
7. In the Eligibility Profile section, add eligibility profiles to limit the standard performance documents to eligible employees, if required by your business process.
8. In the Contributors section, add the roles that will evaluate the performance document. These are the worker role and manager role. Specify the manager type.

9. In the Participation section, enter the number of participants.
    a. Specify the minimum number for each participant role required in total.
    b. Specify the maximum number of participants allowed in total.
10. Click **Add Participant Role**.
11. Click **Add** and add each of the following roles that you created using the Performance Roles task. For example, peer, matrix manager.
12. Click **Save**.
13. Click **Continue**.

Configure the Process Step

In the Process step, add the process flow and configure participation options for the roles that you added in the General tab.

1. In the Process Flow list, search for and select **Performance Process Flow 2024**. This contains the **Manage Participant Feedback** task. This process flow definition will be applied to all performance docs generated using this template.
2. The tasks defined in Performance Process Flow 2024 appear in the Alerts section. Enter standard and critical alert days for these tasks.
3. In the Rating Calculation section, select **Calculate ratings**.
4. Select **Display calculated ratings to worker**.
5. Select **Display calculated ratings to manager**.
6. Deselect **Display calculated ratings to matrix managers** if you don't want to show the calculated ratings to matrix managers. In our case study, this is the Project manager role that you created as a participant earlier and for whom the **Allow role to view worker, manager, and participant ratings, comments, and questionnaires** option is enabled.
7. Deselect **Display calculated ratings to participants**, if you don't want to show the calculated ratings to other participants.
8. In the Processing Options section, select **Display star ratings**.
9. Select **Include digital signature**.
10. Select **Display Feedback Notes**.
11. In the Participant Options section, select any of the following options:
    a. **Auto-populate matrix managers of the worker as participants**. As HR, you can select this option so that the performance document is automatically assigned to the Matrix Manager (project manager) when you select them as a participant in the participants list.
    b. **Allow matrix managers to access worker document automatically** so that matrix managers can access the document as soon as it's created in the Participant Feedback for Others region of their Performance page.
    c. In the Manager Type list of values, select **Specific Manager Types**. This means that you need to select a specific manager, such as the **Project manager** in this case.
    d. **Worker can assign participant roles that can view worker and manager evaluations**. If the **Auto-populate matrix managers of the worker as participants** option above isn't already selected, then select

this option to enable workers to assign the Project Manager role as a matrix manager participant in the Manage Participant Feedback page.

   e. **Manager can assign participant roles that can view worker and manager evaluations**. If the **Auto-populate matrix managers of the worker as participants** option above isn't already selected, then select this option to enable managers to assign the Project Manager role as a matrix manager participant in the Manage Participant Feedback page.

12. Click **Save**.
13. Click **Continue**.

Configure the Structure Step

In the Structure step, you add the sections that you've already configured using the Performance Templates Section task.

After you add each section, you also define which roles have access to these sections and define processing settings for each role so line managers and matrix managers, workers, and other participants can access the sections to rate workers and provide feedback. Any setting that you have configured as part of the Performance Template sections task will be overridden by the changes you make during this configuration.

1. Click **Select Existing Section**.
2. From the list, search for and select the Competencies section. This is the section you already created using the **Performance Template Sections** task.
3. In the Comments section, select **Enable section comments**, if not already selected.
4. In the Processing by Role section at the bottom of the page, click **Add**.
5. From the Role list, select the **Manager** role.
   a. From the Item Ratings, Item Comments, Section Ratings and Section Comments drop-down lists, leave **Optional With Warning** selected.
   b. Select **Yes** for Share Ratings and **Yes** for Share Comments.
   c. Select **Yes** for Update Profile, View Participant Names, and View Participant Roles.
6. From the Role list, select the **Project Manager** role.
   a. From the Item Ratings, Item Comments, Section Ratings and Section Comments drop-down lists, leave **Optional With Warning** selected.
   b. Select **Yes** for Share Ratings and **Yes** for Share Comments.
7. From the Role list, select the **Employee** role.
   a. From the Item Ratings, Item Comments, Section Ratings and Section Comments drop-down lists, leave **Optional With Warning** selected.
   b. Select **Yes** for Share Ratings and **Yes** for Share Comments.
   c. Select **Yes** for Participant Names and View Participant Roles.
8. From the Role list, select the **Peer** role.
   a. From the Item Ratings, Item Comments, Section Ratings and Section Comments drop-down lists, leave **Optional With Warning** selected.
   b. Select **Yes** for Share Ratings and **Yes** for Share Comments.
9. If you have other sections such as Summary or Overall Summary, then repeat steps 4 to 9.
10. Click **Save**.
11. Click **Continue**.

Configure the Document Periods Step

In the Document Periods step, define the review period for the standard performance document, specify eligibility profiles, if any, and create interim evaluation documents, as required.

1. In the Document Periods section, click **Add**.
2. Enter **FY 2024 Annual Evaluation** as the name of the review period.
3. From the Review Period list, search for and select **Review Period**.
4. In the start and end dates of the performance document, leave the default dates selected.
5. Enter **FY24 Eval** as the short name of the performance document.
6. In the Eligibility Profile for the Period section, click **Add**.
7. From the Eligibility Profile drop-down list, search for and select **US Location**. This eligibility profile assigns the standard performance document to all employees located in the US.
8. In the Document Types for Interim Evaluation section, click **Add**.
9. Select **Annual Evaluation**.
10. In the Due Dates section, select dates for each task in a logical sequence.
11. Click **Save**.
12. Click **Continue**.

Preview Your Configuration

As the final step, you can now preview the configurations made for the performance template.

1. Review the template details.
2. Click **Submit**.

Need More Help?

If you need further help with setting up performance documents for matrix management, see these additional resources:

- *Guidelines for Setting Up Performance Templates*
- *Guidelines for Associating Eligibility Profiles with Performance Templates*
- *How You Specify the Number of Participants for a Performance Document*
- *Guidelines for Setting Up Calculated Ratings in Performance Templates and Sections*
- *Guidelines for Defining Processing Roles for Performance Template Sections*
- *Guidelines for Setting Up Performance Document Periods*
- *Performance Document Task Alert Notifications*

Create Standard Performance Documents and Assign Them to Employees

The next step in the process is to create a standard performance document, **Performance Evaluation US 2024** and assign it to **Bala Gupta**. The HR specialist, administrator, or line manager can perform this task.

1. Click **My Client Groups** > **Performance** > **Performance Documents**.
2. Click **Create Document**.
3. Search for an eligible worker by specifying these criteria:
    a. Review Period: **FY 2024 Annual Evaluation**
    b. Performance Document: **Performance Evaluation US 2024**
    c. Employee: **Bala Gupta**
4. Select **Bala Gupta** from the search results to create the performance document.
5. Review the document period start and end dates defined in the performance template.
6. (Optional) Select the line manager of the performance document. This manager must have access to the worker to manage the document.
7. (Optional) Specify a reason for creating the document.
8. Click **Create**.

Add Matrix Managers as Participants in Performance Reviews

HR specialists, line managers, and employees can add matrix managers as review participants to any performance document that they have access to.

This step is necessary only if the HR specialist hasn't already configured the performance template to automatically add matrix managers as participants (that is, if the **Auto-populate matrix managers of the worker as participants** checkbox isn't selected in the Process tab of the performance template). Line managers can verify whether an employee has a matrix manager by viewing the employee's organization hierarchy in Connections.

In this case study, the standard performance document **Performance Evaluation US 2024** has been created from the template and assigned to the employee, **Bala Gupta**. In this task, you'll sign in as **Elizabeth Mavery**, the line manager of **Bala Gupta**, and add his project manager, **Bonnie Vickers**, as a matrix manager participant.

1. Sign in as **Elizabeth Mavery**.
2. Click **My Team** > **Performance**.
3. Use the search filters to view the employee's standard performance document listed in the search results.
4. From the **Actions** menu (displayed as three dots) next to the standard performance document, select **Manage Participant Feedback**.
5. Click **Add**.
6. In Select person from, select the employee pool to which Bonnie Vickers belongs. In this example, select **Team** since Bonnie Vickers belongs to Bala Gupta's project team.

7. Select **Bonnie Vickers** as the matrix manager.
8. In Provide Feedback as, select **Project Manager**, which is the role assigned to Bonnie Vickers.
9. To send the request to the matrix manager right away, leave the **Send now** toggle button selected.
10. Specify a due date and send an optional message to the matrix manager.
11. Click **Save**.

    The employee can also request feedback from their matrix managers by navigating to **Me** > **Career and Performance** > **Feedback** > **Feedback requests about me**. If the **Worker can select participants** checkbox is selected in the performance process flow, the workers can request feedback from matrix managers without needing approval from their line managers. If this checkbox isn't selected, workers can still add participants, but the request is sent to the line manager who'll then review it and forward it to the matrix manager.

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

Set Up Notifications for Matrix Managers

The matrix manager can receive notifications when they're assigned as a review participant only if the appropriate notifications are set up by the administrator.

The administrator can use the Talent Notifications task in the Setup and Maintenance work area or their Performance page to set up Performance Management notifications.

HR specialists can also set up notifications by navigating to **My Client Groups** > **Performance** > **Setup** > **Talent Notifications** > **Performance Management** task.

When an employee submits a completed self-evaluation, matrix managers receive a notification, if the **Worker completes self-evaluation notification** option is enabled.

4 Participate in Performance Evaluations

Matrix Manager Tasks in a Performance Evaluation

As a matrix manager, these are the tasks you can do in a performance evaluation:

- Provide ratings and comments in sections that you can access in the standard performance document.
- Review the submitted ratings, comments, and questionnaire responses provided by the employee, other managers, and other participants, if your role has access to them in the standard performance document.
- Reopen feedback that you submitted and revise your comments or ratings. You can continue to revise your feedback until the line manager either locks the feedback process or completes the Manager Evaluation of Workers task and submits the standard performance document.

> **Note:** Note that matrix managers can't add or remove content items, such as competencies or goals, from a standard performance document.

To participate in the performance evaluation process, you'll sign in as the matrix manager Bonnie Vickers.

Evaluate an Employee's Standard Performance Document

As a matrix manager, you might see competencies, goals, and an overall summary section on the Participant Feedback page, depending on how the performance document is set up.

You can view the ratings and comments provided by the employee, performance document manager, and other participants only if you're assigned a participant role. Also, the **Allow role to view worker and manager evaluations** checkbox must be selected for your participant role on the Performance Roles page.

In our example, the standard performance document has the Competencies and Overall Summary sections set up.

1. Go the Participant Feedback page.
2. Expand each competency.
3. In Participation Proficiency, indicate your proficiency level. This isn't a required field.
4. In Participant Rating, provide your rating for the employee.
5. If you see a comments field, it's recommended that you provide your comments to support your rating.
6. Click **Save and Next**.
7. Repeat steps 2 to 5 for the rest of the competencies.
8. Provide your overall rating for the employee's performance, along with comments.
9. Click **Save and Close**.
10. Click **Submit**.

Revise Your Evaluation

After submitting your evaluation as a matrix manager, you can revise it if required, and until the standard performance document is available for your review.

1. Go to your Feedback spotlight page.
2. Click the **Feedback About Others** tab. You'll see the standard performance document for the employee in the Feedback requests about others section.
3. Click the **Give Feedback** icon to revise your evaluation.
4. You can revise your ratings and comments as required and submit the document.

View a Matrix Manager's Evaluation

After a matrix manager provides their feedback, the line manager and the employee can see their ratings and comments, if they have the required permissions set up in the standard performance document.

If you're a line manager, here's how you can see the matrix manager's evaluation:

1. Click **My Team** > **Performance**.
2. Use the search filters to view the employee's standard performance document.
3. Click the link displayed in the Participant Feedback section. For example, if you sent the request to 3 participants, and one of them completed their evaluation, you'll see the link, **1 of 3 participants responded**.
4. Click the **Actions** menu (three dots) next to the matrix manager's name and select **View Feedback**.

If you're an employee, here's how you can see the matrix manager's evaluation:

1. Click **Me** > **Performance** > **Feedback**.
2. In the Feedback requests about me section, you can see the feedback that you've received.
3. You can print the feedback, if required.

View Notifications for Performance Evaluation Requests

When a manager or an employee adds a matrix manager as a participant in a standard performance document and sends the evaluation request, the matrix manager receives a notification on the global header, if the notification has been set up by the administrator.

As a matrix manager, you can access the standard performance document for evaluation in one of these ways:

- Click the **Provide Participant Feedback** link in the notification.
- Or, click **Me** > **Feedback**. Click the **Feedback About Others** tab. You'll see the evaluation requests that you received in the Feedback requests about others section.

This takes you to the next page in the process, the Participant Feedback page.