Oracle Fusion Cloud Talent Management

How do I configure performance document approvals?

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Author: Lakshmi VR

Contents

Oracle Fusion Cloud Talent Management
How do I configure performance document approvals?

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Oracle Fusion Cloud Talent Management
How do I configure performance document approvals?

Get Help

ORACLE

Oracle Fusion Cloud Talent Management
How do I configure performance document approvals?

Chapter 1
How do I configure performance document approvals

1 How do I configure performance document approvals

Set Up 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.

1. 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 Setup and Maintenance.
2. You set up approvals and the associated notifications using the **Define Approval Management for Human Capital Management** task in Setup and Maintenance.

Include Approval Tasks in Process Flow

To use approvals, you need to 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 autosubmit for approval tasks, when the preceding task is completed, the approval task submits automatically. You can select autosubmit 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.

Configure Approval Hierarchy and Notifications

When you configure approvals, the predefined approval chain includes the manager of the worker being evaluated.

However, you can add additional levels of approvers and other roles, such as HR specialist. Other roles must have the correct privilege for approvals and a data security profile that lets that includes access to the worker whose performance document they're asked to approve.

Oracle Fusion Cloud Talent Management
How do I configure performance document approvals?

Chapter 1
How do I configure performance document approvals

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**.

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.

Approval Actions for Performance Documents

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

Let's see 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

ORACLE

Oracle Fusion Cloud Talent Management
How do I configure performance document approvals?

Chapter 1
How do I configure performance document approvals

- Request Information

- Reassign

- Delegate

- Suspend

- Resume

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

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

Task Status After Rejection

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

Reassign and Delegate

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

Bypass

Bypass the Performance Approval task to separate it from the transactional approval task. Continue the evaluation process when approvers are unable to approve the performance document. For example, if they're on leave. Bypassing the performance approval task automatically stops 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.

ORACLE

Oracle Fusion Cloud Talent Management
How do I configure performance document approvals?

Chapter 1
How do I configure performance document approvals

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.

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