Oracle Fusion Cloud Talent Management

How do I configure performance process flows?

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1 Set Up Performance Process Flow

Overview

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

You create and manage process flows using the **Performance Process Flows** task in **My Client Groups > Performance > Setup and Maintenance**.

What process flows you create determine the following:

- The tasks and subtasks to include
- The task sequence
- The task names

Tasks and Subtasks

A process flow can contain tasks and 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
Evaluation Preparation	N/A	Manager, worker, or both	Add content to rate, such as competencies, performance goals, and development goals to the performance document. Include this task to let workers and managers determine the content the worker is evaluated on, and expectations for the worker, for example, at the beginning of an evaluation period. If this task isn't included, managers and workers can still add content in the Worker Self-Evaluation and Manager Evaluation of Worker tasks. You can select whether to allow workers, managers, or both, to complete the task. When they complete the task, they can use the Share action to allow the other role to review the new content.

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	Worker evaluates self. Worker can also add content to be rated to the performance document. The manager: • Can track the worker self-evaluation to view any changes the worker makes to the performance document • Can't view the ratings and comments the worker provides until the worker completes the subtask
Manager Evaluation of Worker	N/A	Manager	Manager evaluates worker. Manager can also add content to be rated to the performance document. Select **Don't allow additional edit of manager evaluation task when completed** to prevent managers from updating ratings and comments once they submit the task.
Participant Feedback	N/A	Manager, worker, or both	Select participants to provide 360-degree feedback in a performance evaluation by providing ratings, comments, or both and completing questionnaires. Send requests to the participants, add questions to questionnaires, and track participant feedback to monitor the status of the request and feedback.
First Approval	N/A	Manager	First task for the approver to approve the performance document of the worker at one stage of the evaluation. Select **Automatically submit approvals when preceding task is completed** to submit the performance document for approval automatically when the previous task is completed.

Task	Subtask	Role that Performs Task	Task Function
			The automatic submission for approvals also applies when using the Update Performance Tasks task to move tasks forward or back to a task that precedes an approval task. The setting applies to both the First Approval and Second Approval tasks
Second Approval	N/A	Manager	Second task for the approver to approve the performance document of the worker at a later stage of the evaluation.
Share Performance Document	Subtask 1: Share Performance Document Subtask 2: Acknowledge Document	Subtask 1: Manager Subtask 2: Employee	The manager shares the document so the employee can view the manager's ratings and comments and acknowledge it. Managers can do any of these actions: • Share the document with the employee while continuing to edit it. • Release the document to the employee and no longer edit it. HR specialists can choose not to allow managers to share the document with employees during the calibration period. When they lock the document for sharing, managers see a banner explaining that they can't share it when it's locked. The settings in the performance template determine which of the manager's ratings and comments an employee can see on the shared performance document.
Confirm Review Meeting Held	Subtask 1: Conduct Meeting Subtask 2: Acknowledge Review Meeting	Subtask 1: Manager Subtask 2: Worker	After the worker and manager meet to discuss the evaluation, the manager indicates that the meeting was conducted, then the worker acknowledges that the meeting took place.

Task	Subtask	Role that Performs Task	Task Function
Provide Final Feedback	Subtask 1: Worker Provides Final Feedback Subtask 2: Manager Provides Final Feedback	Subtask 1: Worker Subtask 2: Manager	The worker, but not the manager, can provide final comments about the evaluation in the Worker Provides Final Feedback subtask. The manager, but not the worker, can provide final comments in the Manager Provides Final Feedback subtask. The **Include digital signature processing** option is available to enable workers to verify that they're the people submitting the performance document. The option is available only in the Worker Provides Final Feedback subtask, so the task must be included in the process flow to activate it. If the option is selected, the signature is required from the worker.

Task Sequence

You need to specify the task sequence after you select the tasks to include in your process flow.

You can determine and change the task sequence, if required. Some tasks are logical in sequence.

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:

- Evaluation Preparation
- 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 Evaluation Preparation 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 pages. You must configure task names separately for each process flow you set up.

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	Evaluation Preparation	Set Competencies and Goals	N/A	N/A	Worker Manager
20	Worker Self-Evaluation	N/A	Subtask 1: Track Worker Self-Evaluation Subtask 2: Worker Self-Evaluation	Subtask 1: Track Employee Evaluation Subtask 2: Evaluate Yourself	Subtask 1: Manager Subtask 2: Worker
30	Manager Evaluates Worker	Evaluate Employee	N/A	N/A	Manager
40	Manage Participant Feedback	Request Feedback	N/A	N/A	Manager
50	First Approval	Approve Evaluation	N/A	N/A	Manager
60	Confirm Review Meeting Held	N/A	Subtask 1: Conduct Meeting Subtask 2: Worker Acknowledges Review Meeting	Subtask 1: Confirm Meeting Subtask 2: Acknowledge Meeting	Subtask 1: Manager Subtask 2: Worker
70	Provide Final Feedback	N/A	Subtask 1: Worker Provides Final Feedback Subtask 2: Manager Provides Final Feedback	Subtask 1: Provide Feedback to Manager Subtask 2: Provide Final Feedback	Subtask 1: Worker Subtask 2: Manager

Create a Process Flow for a Project Review

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

For the project review, these guidelines apply:

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

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

Task Order	Task	Subtask	Roles
10	Manager Evaluates Worker	N/A	Manager
20	First Approval	N/A	Manager
30	Share Performance Document	Subtask 1: Share Performance Document Subtask 2: Worker Acknowledges Document	Subtask 1: Manager Subtask 2: Worker

2 Define Tasks in Process Flow

Concurrent Worker Evaluation Tasks

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

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

Configure Evaluation Tasks for Concurrent Evaluations

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

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

Add, Remove, and Update Content

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

These rules apply to removing content:

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

View Added Competencies and Goals

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

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

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

View Ratings and Comments

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

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

Participant Feedback Task Options

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

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

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

Include the Manage Participant Feedback Task

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

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

Select Participants

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

Send Feedback

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

Add Questions to the Questionnaire

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

Track Participants and Feedback

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

Reopen Participant Feedback

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

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

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

Approval Tasks

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 needs to 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 need to approve the document before the evaluation continues.

You can configure performance process flows to skip the action of submitting performance documents for approval in the **Approval, Review and Meetings** section. If you enable the **Automatically submit approvals when preceding task is completed** option, the approval task submits automatically. This setting applies to both the **First Approval** and the **Second Approval** task.

Options for Configuring Performance Documents to Display Performance Ratings to Employees

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

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

- Process flow
- Sections in the performance template

Configure the Process Flow

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

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

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

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

Task Scenario	Impact
Share Performance Document task is included in process flow	Employees can view performance ratings and comments when the manager clicks either of these buttons: • **Share and Edit** • **Share and Release**

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

Configure Sections in the Performance Template

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

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

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

1. In the **Processing by Role** section, add a row and select **Manager**.
2. In the **Manager** row, select **Yes** in these columns:
    - **Share Ratings**: To share ratings with the employee
    - **Share Comments**: To share comments with the employee

    > **Note:** The default setting for both columns is **No**.
3. To make the section visible to the employee, add another row and select **Worker**. The **Share Ratings** and **Share Comments** settings for the **Worker** row are set to **Yes** and you can't change their value because managers can always view the employee ratings and comments.

3 Complete Tasks in Process Flow

How Performance Document Completion Status Is Determined

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

Settings That Affect Performance Document Completion Status

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

The following table shows the task statuses.

Task	Roles	Valid Statuses	Has Subtasks?
Evaluation Preparation	Worker Manager	Not started In progress Completed	No
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 Manager	Not started In progress Completed	Yes
First Approval	Manager as Requester	Not started Approved	No
Second Approval	Manager as Requester	Not started Approved	No

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

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

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

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

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

Task	Subtask	Roles	Valid Statuses
Share Performance Document	Share Performance Document	Manager	Not started

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

How Completion Status is Calculated

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

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

Document Status	What the Status Means
Not started	No tasks are started
In progress	At least one of the following tasks are in progress or completed: Worker Self-Evaluation, Manager Evaluation of Worker, Manage Participant Feedback
Submitted	Manager submitted the performance document for approval
Approved	Approver approved the performance document

Document Status	What the Status Means
Document shared with worker	Manager completed the Share Performance Document subtask
Document acknowledged	Worker completed the Share Performance Document subtask
Review meeting held	Manager completed the Confirm Review Meeting Held subtask
Review meeting acknowledged	Worker completed the Confirm Review Meeting Held subtask
Worker final feedback provided	Worker submitted final feedback
Manager final feedback provided	Manager submitted final feedback
Completed	All tasks and subtasks are completed
Canceled	Human Resource (HR) specialist or the manager canceled the performance document

Relationship of Subtask Status to Task Status for One Subtask

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

Relationship of Subtask Status to Task Status for Two Subtasks

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

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