

Oracle Fusion Cloud Talent Management

**How do I create performance
template sections in the Redwood
experience?**

fa-latest



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1 Overview

Overview

Performance template sections map to an evaluation topic in your performance document.

You can create section types that are listed here:

- 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

Depending on the section type you choose, you'll need to configure 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 select and edit previously created sections or create new ones.

2 Set Up Performance Template Section

Tasks and Sections

Based on the tasks in your process flow you can create the section types to include in your performance template. The tasks that require a section, and the sections that you need to include are listed in the following table.

Task	Required Section
Worker Self-Evaluation Manager Evaluations of Workers	At least one of: <ul style="list-style-type: none">• Profile Content (for Competencies)• Performance Goals• Development Goals• Overall Summary
Manage Participant Feedback	At least one of: <ul style="list-style-type: none">• Profile Content (for Competencies)• Performance Goals• Development Goals• Overall Summary• Questionnaire
Worker Provides Final Feedback	Worker Final Feedback
Manager Provides Final Feedback	Manager Final Feedback

Calculation Rules

You can set up calculation rules to automatically calculate an employee's performance rating in addition to having workers and managers manually enter ratings in the sections.

The sections for which you can use calculated ratings are listed here:

- Overall Summary
- Profile Content
- Performance Goals

- Development Goals

For the Overall Summary section, 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 is used. 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

You use rating models in the Overall Summary, Profile Content (for Competencies), Performance Goals, and Development Goals sections, to rate the workers.

You set up rating models in Profile Management 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 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 Ratings and Weighting

You can determine whether you want to enable section ratings, comments, or both for the sections that you create.

When you enable section ratings and comments, managers, workers, and participants can select a rating for the section and provide comments. If configured, they can also rate the section separately from the individual content items contained within the section.

Managers, workers, participants, and matrix managers can use calculated ratings as a guide to manually select their ratings. For the profile content, performance goals, and development goals sections, ratings are calculated based on ratings on individual items in the section. For the overall summary section, the section ratings from the profile content, performance goals, and development goals sections are used.

You can select to weight a section, or items in a section to place more or less importance on the section or item. The weights are then used 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 those are considered in the overall rating if it's calculated, and their weights, if configured.

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.

3 Configure Performance Template Settings

Calculated Ratings

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

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

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

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

Where Calculated Ratings Appear

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

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

Calculated Ratings and Compensation Management

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

Calculated Ratings Roll Up

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

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

Guidelines for Setting Up Calculated Ratings in Performance Templates and Sections

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

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

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

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

Calculated Ratings Activation and Display Options

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

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

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

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

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

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

Section Rating Model and Calculation Rules

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

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

- Fast formula
- Average
- Sum
- Band

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

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

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

Decimal Places

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

Decimal Rounding Rule

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

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

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

Mapping Metric

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

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

Mapping Method

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

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

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

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

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

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

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

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

Related Topics

- [Overview of Using Fast Formulas](#)

Considerations for Using Performance Template Section Calculation Rules

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

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

- Average
- Sum
- Band
- Fast Formula

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

- Numeric rating
- Points range

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

Average Method

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

This is how the average is calculated:

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

This is how the points range mapping metric works:

- It calculates the total numeric score using the numeric ratings defined in the rating model

- It converts this total into the corresponding review rating for the section by mapping the total numeric score to the points range

Sum Method

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

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

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

This is how the points range mapping metric works:

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

Band Method

This method is similar to the sum method, but is available only for the Overall Summary section of a performance document. The Profile Content, Performance Goals, and Development Goals sections, however, use the average or sum method. To use the band method, the rating model that's associated with the Overall Summary section must define review points as well as point ranges (from points and to points).

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

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

Fast Formula Method

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

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

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

Related Topics

- [Overview of Using Fast Formulas](#)

Options for Item Processing in a Performance Template Section

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

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

Rating Type

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

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

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

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

When you select either Performance or Proficiency and performance rating types, you can use the same rating model for content items that the section uses, or select another. You can also select different performance rating models for individual content items. This enables your organization to rate some performance goals that may be specific to a department using a different rating model than that used for organization-wide goals, for example.

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

Item Calculation

The item calculation method determines how the item is rated.

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

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

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

Properties

Select the attributes you want to make available for items.

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

Property	Effect
Target Proficiency Level	Target proficiency levels appear for the items in the performance document. The target proficiency level that appears is the minimum proficiency level for the competency set in the profile type used to populate the performance document. For example, you select job profile as the profile type used by the section. The target proficiency levels in the performance document is the minimum proficiency level for the competencies belonging to the worker's job profile.
Target Performance Rating	You can select target performance ratings for the items you add to the section or the performance template. In the performance document, workers can select target performance ratings for items they add to the document. Managers can select target performance ratings for items that they, or the workers, add.
Weight	<p>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:</p> <ul style="list-style-type: none">• Items they add to the document• Performance goals added from the goal management business process• Development goals added from the career development business process <p>When using calculated ratings, the weights are used only when you select the Average calculation rule for the section.</p>
Minimum Weight	<p>You can enter minimum weights for items in the performance template.</p> <p>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.</p>
Required	In the performance template section or the performance template, select the Required check box to prevent workers and managers from editing or deleting the item in the performance template from the performance document.

How Performance Ratings Using the Sum and Band Methods Are Calculated

You can set up calculated ratings for each section and the overall rating using the sum method. You can use the sum method to calculate ratings using any rating model.

You can also use it to calculate the overall rating when at least one of the Profile Content, Performance Goals, or Development Goals sections uses the average method, and the others use the sum method.

Settings That Affect Sum and Band Rating Calculations

The factors that determine sum and band rating calculations are the:

- Rating models that are selected for each section and content item

- Numeric ratings and points ranges assigned to each rating level

Items without ratings aren't counted when calculating the ratings. For the band method, the numeric ratings must be associated with a points range. The rounding rules, mapping metric, and mapping methods must also be set in the performance template sections.

How Performance Ratings Are Calculated

In the sum method, the section rating is the sum of the numeric rating from the rating level for each content item. The overall rating is the sum of the numeric ratings for the section ratings.

For the band method, as in the sum method, the sum of the section rating is calculated. For the overall rating, the numeric rating total from the sections is converted to the points range associated with a rating level.

Example 1: Sum Method with Sum Sections

ABC Company uses the same rating model for the Competencies, and Performance Goals content items. The performance document contains no Development Goals section. The following table shows the rating levels and the numeric ratings assigned to each level.

Rating Level	Numeric Rating
1-Weak	1
2-Poor	2
3-Average	3
4-Good	4
5-Excellent	5

The following table shows the rating model used for the Competencies and Performance Goals sections, and the rating levels and numeric ratings assigned to each level.

Rating Level	Numeric Rating
1-Weak	5
2-Poor	10
3-Average	15
4-Good	20
5-Excellent	25

The following table shows the rating model for the Overall Summary section and the rating levels and numeric ratings assigned to each level.

Rating Level	Numeric Rating
1-Weak	10
2-Poor	20
3-Average	30
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

Goal	Item Numeric Rating
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

Rating Level	Numeric Rating

The following table shows the worker ratings for the Competencies section.

Competency	Item Numeric Rating
Teamwork	4
Leadership	3
Communication	2
Analytical Skills	4
Ethics	5
Conceptual Thinking	4

The sum of the item rating scores: $4 + 3 + 2 + 4 + 5 + 4 = 22$ is calculated. To determine the section rating, mapping rules for the rating model assigned in the performance template are used. In this example, the mapping rule is Nearest, which assigns the section a rating level of 2.

The following table shows the ratings for the Performance Goals section, which uses the average method.

Goal	Item Numeric Rating	Maximum Rating from Rating Model	Decimal Score (Item Rating / Maximum Rating)
Increase sales revenue	5	5	1.0
Cut expenses	3	5	0.6
Grow business in Asia	2	5	0.4
Participate in mentoring	4	5	0.8

The sum of the decimal scores is 2.8, from a possible maximum of 4.0. The 2.8 must be converted to a value on the rating model for the section. The section maximum numeric rating is 5, so the Performance Goals section calculated rating is: $(2.8 / 4) \times 5 = 3.5$.

To determine the Performance Goals final section rating, the mapping rules for the rating model assigned in the performance template are used. In this example, the mapping rule is Nearest and the calculated section rating for goals is 3.5 out of 5, which maps to a numeric rating of 4.

To determine the overall rating, the sum of the numeric ratings for the Competencies and Performance Goals sections is used: $20 + 4 = 24$, which maps to the section numeric rating 20.

Example 3: Band Method

ABC Company sets up a performance template in which the section ratings are calculated using exactly the same parameters as in the previous example, but the band method is used for the Overall Summary section to calculate the overall rating.

The following table shows the review point ranges set up for the Overall Section rating model to assign the rating level for the overall rating.

Rating Level	From Points	To Points
1-Weak	0	5
2-Poor	6	10
3-Average	11	25
4-Good	26	40
5-Excellent	41	50

To determine the overall rating, add the section numeric ratings from the previous example. The Competencies numeric rating is 20; the Performance Goals section numeric rating is 4. The total is: $20 + 4 = 24$. Using the total numeric rating and applying the point ranges shown in the table, the total score of 24 for the sections lies in the range of 11 to 25. The worker's overall rating is 3-Average.

How Performance Ratings Using the Average Method Are Calculated

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

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

Settings That Affect Average Rating Calculations

The factors that determine average rating calculations are the:

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

How Performance Ratings Are Calculated

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

Example: Average Method Without Weighting

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

Assume the following performance template section configurations:

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

The following table shows the ratings for the Competencies section.

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

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

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

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

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

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

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

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

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

Example: Average Method with Weighting

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

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

The following table shows the ratings for the Competencies section.

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

Competency	Item Numeric Rating	Maximum Numeric Rating from Rating Model	Decimal Score (Item Rating / Maximum Rating)	Weight	Weighted Score (Decimal Score x Weight)
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:

(Weighted Score) / (Total Maximum Weighted Score) x (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
Grow business in Asia	5	5	1.0	25	25.0
Participate in mentoring	5	5	1.0	15	15.0

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

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

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

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

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

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

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

Example: Average Method with Weighting and Rating Model Variations

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

Assume the following performance template section configurations:

- Section weights are applied
- Different weights are applied to the content items
- Decimal rounding rule is Standard
- Decimal display is 2
- Mapping metric is Numeric Rating
- Mapping method is Nearest

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

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

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

$(\text{Weighted Score}) / (\text{Total Maximum Weighted Score}) \times (\text{Maximum Numeric Rating from Section Rating Model})$, 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 sum of the numeric ratings is calculated for the two weighted sections, then it converts the score to the rating model scale. ABC sets the Competencies section weight to 40, and the Performance Goals section weight to 60. The overall summary section uses a rating model with a maximum score of 9.

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

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

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

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

The scores are then converted to the rating model scale to determine the overall rating: $(83.8 / 100.0) \times 9 = 7.542$. When the rounding rules and decimal places are applied, overall rating is 7.54, which maps to the section numeric rating 8.

How 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.

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).

4 Add Competency Content Sections

Sources for Profile Content Section

You can select and populate competencies from the model profile related to the worker's job, job family, position, or organization in the Profile Content section. 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.

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.

Populate Performance Documents With Person Profile Competencies

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

This gives employees the opportunity to be evaluated on other individual competencies that aren't populated based on their job, position, or organization.

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

Update Performance Document Model Profile Competency Sections

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

You can run the process to add any new competencies that were added to job, position, or organization profiles to performance documents that use those profiles. This process is available at **My Client Groups > Performance > Process Mass Actions for Performance Documents**. When you submit it, it only updates in-progress performance documents. In-progress performance documents are documents where the evaluation tasks, worker self-evaluation, manager evaluation, and manage participant feedback are incomplete.

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 Profile Management aren't automatically removed from performance documents.

Considerations for Adding or Removing Competencies in Talent Profile Competency Sections

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

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

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

5 Add Goal Content Sections

Sources for Goals Content Section

The sources for performance goals and development goals are different. The configuration options you select will determine how the goals appear in a performance document.

Performance Goals

You can select and add Performance Goals from goal plans in Goals Center to the Performance Goals section. To update goals in performance documents with weights that are revised in Goals Center, 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's 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 Goals Center 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.

Development Goals

You can select **Populate with workers development goals covering any part of evaluation period** in the Development Goals section to add goals from Career Development. You can select the following 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 workers existing goals in Career Development, the changes are reflected in the performance document when it's opened. To populate the performance document with new development goals from Career Development, they must use the Update Goals action in the performance document.

6 Examples of Template Sections

Create a Performance Template Section for Profile Content

This example demonstrates how to create a Profile Content section to rate competencies in the performance document and use calculated ratings to determine the overall rating.

To create a performance template section for Profile Content, follow these steps:

1. Go to **My Client Groups > Performance > Performance Template Sections**.
2. Click **Add** in the Performance Template Sections page.
3. Complete each section as described below.

Section Details

1. In the **Section Details** section, complete the fields as shown in this table.

Field	Value
Name	Competencies
Description	This section is used to rate competencies and calculate section ratings as part of the overall ratings. The section weight section is 40 to complement the Performance Goals section.
From Date	01/01/2025
To Date	12/31/2025
Status	Active

2. Click **Save**.

Section Processing

1. In the **Section Processing** section, complete the fields, as shown in this table.

Field	Value
Section Type	Profile Content

Field	Value
Section Rating Model	Any
Rate Section	Select
Calculation Rule for Section	Average
Decimal Places	2
Decimal Rounding Rule	Standard
Mapping Metric	Numeric Rating
Mapping Method	Nearest
Enable section comments	Select
Weight section	Select
Item Weight	40

2. Click **Save**.

Item Processing

1. In the **Item Processing** section, complete the fields, as shown in this table. Use the default values except where indicated.

Field	Value
Enable items	Select
Rate items	Select
Rating Type	Proficiency
Use section rating model for performance rating	Select

Field	Value
Performance Rating Model	Any
Item Calculation	Proficiency
Enable item comments	Select
Target Proficiency Level	Select
Target Performance Rating	Select
Minimum Weight	Select
Weight	Select
Required	Select

2. Click **Save**.

Section Content

1. In the **Section Content** section, complete the fields, as shown in this table. Use the default values except where indicated.

Field	Value
Use profile related to worker's job data	Select
Profile Type	Job profile type
Use specific content items	Select
Enable writing assistant for manager	Select

2. In the **Content Items** section, click **Add**.

3. In the **Content Items** section, complete the fields, as shown in this table. Use the default values except where indicated.

Field	Value
Item Name	Any
Target Proficiency Level	Any
Weight	Any
Required	Select

4. Click **Save**.

Create a Performance Template Section for Performance Goals

This example demonstrates how to create a Performance Goals section to rate performance goals in the performance document and use calculated ratings to determine the overall rating.

To create a performance template section for Performance Goals, follow these steps:

1. Go to **My Client Groups > Performance > Performance Template Sections**.
2. Click **Add** in the Performance Template Sections page.
3. Complete each section as described below.

Section Details

1. In the **Section Details** section, complete the fields as shown in this table.

Field	Value
Name	Performance Goals
Description	This section is used to rate performance goals and calculate section ratings as part of the overall ratings. The section weight section is 60 to complement the Competencies section.
From Date	01/01/2025
To Date	12/31/2025

Field	Value
Status	Active

2. Click **Save**.

Section Processing

1. In the **Section Processing** section, complete the fields as shown in this table.

Field	Value
Section Type	Performance Goals
Section Rating Model	Any
Rate Section	Select
Calculation Rule for Section	Average
Decimal Places	2
Decimal Rounding Rule	Standard
Mapping Metric	Numeric Rating
Mapping Method	Nearest
Enable section comments	Select
Weight section	Select
Section Weight	60

2. Click **Save**.

Item Processing

1. In the **Item Processing** section, complete the fields as shown in this table. Use the default values except where indicated.

Field	Value
Enable items	Select
Rate items	Select
Rating Type	Performance
Use section rating model for performance rating	Select
Performance Rating Model	Any
Item Calculation	Performance
Enable item comments	Select
Target Performance Rating	Select
Minimum Weight	Select
Weight	Select
Required	Select

2. Click **Save**.

Section Content

1. In the **Section Content** section, complete the fields as shown in this table. Use the default values except where indicated.

Field	Value
Populate with Worker Performance Goals	Select

Field	Value
Allow update goals action to update goal weights from goal management business process	Select
Use specific content items	Select

- In the **Content Items** section, click **Add**.
- In the **Content Items** section, complete the fields, as shown in this table. Use the default values except where indicated.

Field	Value
Item Name	Any
Performance Rating Model	Any
Target Performance Rating	Any
Weight	Any
Minimum Weight	Any
Required	Select

- Click **Save**.

