Oracle Fusion Cloud Talent Management

How do I create performance templates and documents in Redwood experience?

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G31013-02

Author: Lakshmi VR

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1 Overview

Overview

Create performance templates to create the performance documents that managers, workers, and participants use to evaluate workers performance for a given time period or project.

When you create a performance template, you can select either of these types:

- Standard, for typical performance documents, such as annual or company-wide evaluations.
- Anytime, for performance documents that managers and workers can create any time to evaluate the worker such as for project work or performance improvement plans.

At a high-level, this playbook takes you through the steps to create a standard performance template and performance document:

- Set Up Template Requirements
- Create Performance Templates
- Run the Eligibility Batch Process
- Create Standard Performance Documents for Workers
- Run Scheduled Processes to Sync Content in Performance Documents

For information on profile options that you need to configure, refer to *HCM Redwood Pages with Profile Options* on My Oracle Support

2 Set Up Template Requirements

Create Review Periods

You need to create a review period and associate it in your performance template.

Review periods are business periods that you use to measure performance and achieve results. They enable you to organize your processes into time bound business cycles. For example, you can create a review period for the Financial Year 2020 as FY2020.

1. Go to **My Client Groups > Performance > Review Periods**.
2. Click **Add**.
3. In the New Review Period page, enter the following details.

Field	Value
Name	Unique name for the review period.
Description	Brief description for the review period.
Start Date	Start date of the review period.
End Date	End date of the review period.
Status	Select if you want the review period to be used.

4. Click **Create**.

Considerations for Review Periods

You can create review periods whenever you want to, and later associate them with goal plans, goal plan sets (if enabled), and performance documents.

These considerations apply for review periods:

- If a review period is in use, then you can't modify its start and end dates.
- You can set the status of a review period to active or inactive any time. The business objects already associated with a review period that you make inactive continue to use the review period. But HR specialists can't see an inactive review period when creating a business object, such as a goal plan, goal plan set, or performance document.
- You can hide inactive review periods in all employees and managers responsive pages. You need to set the Display Inactive Review Periods (ORA_HRT_DISPLAY_INACTIVE_REVIEW_PERIODS) profile option to No. But remember that HR specialists will continue to see inactive review periods regardless of the profile option value.
- You can delete review periods that aren't in use.

Create Document Types

You need to create performance document types to associate to performance templates. Document types help categorize templates.

You can use performance document types to determine:

- Which performance documents provide interim ratings in later performance documents
- Which goal plans the performance goals in a performance template belong to. Additionally, the Evaluation Type determines which section of the performance template the goal plan is mapped to.

1. Go to **My Client Groups > Performance > Performance Document Types**.
2. Click **Add**.
3. In the New Performance Document Type page, enter the following details.

Field	Description
Name	A unique name for the document type.
Description	A description for the document type.
Start Date	The start date of the document type. This date must be the same as or before the performance template from date.
End Date	The end date of the document type. This date must be the same as or later than the performance template to date.
Status	Set the status to Active to make it available for performance templates and performance goals plans. Once it's used in a template or goal plan, you can't set it to Inactive.

4. Click **Submit**.

Create Eligibility Profiles

You need to create eligibility profiles so that you can associate them at the template level and with performance document periods. You create eligibility profiles using the Eligibility Profiles task in the Setup Maintenance work area.

You can associate eligibility profiles for any profile usage to a performance template. However, only those with the assignment set to Specific assignment are available to associate with performance templates.

Eligibility profiles can either be required, or not required, and can be used in combination so that workers must match some or all criteria. Performance documents created from the template that has eligibility criteria are available only to the workers who meet the criteria. If you don't associate eligibility profiles with a performance document, the document can be created for everyone in the organization.

Create Performance Roles

Create roles that are eligible to participate in the performance evaluation and provide ratings and comments.

To implement multiparticipant feedback, you must first define the roles that can participate in the process. For example, you might have participant roles such as peer or mentor, or participant roles to facilitate a matrix management review. You may have additional manager roles used in performance templates where the default manager type isn't the line manager, such as, project performance documents where the default manager is a project manager.

1. Go to **My Client Groups > Performance > Setup Maintenance > Performance Roles**.
2. Enter a unique name for the performance role and a brief description.
3. Select either the Manager or Participant role type.
4. If the Role Type is Manager, select Default Manager Type.
5. If you want the participant role to be able to view worker and manager evaluations, select **Allow role to view worker, manager and participant ratings, comments, and questionnaires**.
6. Select a status. The default is Active.
7. Select From and To dates. These dates need to overlap with the performance template dates.
    - The from date must be the same as or before the performance template from date.
    - The to date must be the same as or later than the performance template to date.
8. Click **Submit**.

Create Process Flows

Set up the process flow to determine which tasks are included in the performance template. You can select an existing process flow or create one as you create the template.

You can determine the tasks and subtasks to include, the sequence, and the names.

1. Go to **My Client Groups > Performance > Performance Process Flows > Add**.
2. In the New Performance Process Flow page, enter the name of the process flow and a brief description.
3. Select a status. The default is Active.
4. Select the From and To dates. These dates must be the same as or extend beyond the date range of the performance templates in which they're used.
    1. Worker Self-Evaluation and Manager Evaluation Section
5. Select these options as needed:

Configure task	To
Include worker self-evaluation task	Enable employees to evaluate themselves.
Include manager evaluation of worker task	Enable line managers to evaluate their direct reports. If you don't want managers to make any changes after the manager evaluation task, select **Don't allow additional edit of manager evaluation task when completed**.

Configure task	To
Evaluation tasks can be performed concurrently	Enable both workers and managers to evaluate the worker's performance document at the same time.

2. Participant Feedback Section

6. Select these options as needed:

Configure participant feedback options	To
Include manage participant feedback task	Enable other participants, such as matrix managers, peers, colleagues to access the performance document and evaluate the worker.
Manager can select participant	Enable managers to select participants. This also enables other options that you can choose to allow managers to add questions, track participants, and reopen submitted feedback.
Participant can reopen submitted feedback	Enable participants such as matrix managers or peers to reopen the feedback they submitted.
Worker can select participants	Enable employees to select participants. This also enables other options that you can choose to allow workers to add questions, request feedback, track the feedback status, and reopen submitted feedback.

3. Approval, Review and Meetings Section

7. Select these options as needed:

Configure approval and review tasks	To
Include approval processing task	Enable the approver to approve the first task in 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. If you have a second approval task at a later stage of the evaluation, select the **Include second approval processing** task.
Include document sharing task	Enable managers to 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. Select **Allow document sharing task to be locked for calibration** to restrict managers from sharing the document with employees during the calibration period. Select **Worker must acknowledge document** to enable the worker to acknowledge the document.
Include review meeting task	Enable the worker and manager to meet and review the evaluation, and for the manager to indicate the meeting

Configure approval and review tasks	To
	was conducted. Enable **Worker must acknowledge review meeting** to confirm the review meeting was held.
Include worker provide final feedback task	Enable the worker to provide final comments on the evaluation. The **Include digital signature processing** option is available for 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.

8. Click **Task Names.**
9. Enter the sequence numbers and names for the tasks as per the role.
10. Click **Submit**.

Create Performance Template Sections

You need to create a section for each task used in the process flow. Each section corresponds to an evaluation topic or section in the performance document.

The section types you can create 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

In the performance template, you can create sections or select and edit previously created sections.

1. Go to **My Client Groups > Performance > Performance Template Sections**.
2. Click **Add** in the Performance Template Sections page.
3. Enter the section details.
4. Select the section type you want to add and specify the rating and calculation rules for the section.
5. Specify the item processing details.
6. Click **Submit**.

3 Create Performance Templates

Create Performance Template

A performance template brings together the information used to create performance documents. In the performance template, you can do the following:

- Select the document type and eligibility profiles.
- Add the roles that can access the performance documents created from the template.
- Specify the process flow for the document.
- Select the sections you want to include and specify the sequence.
- Add additional content on which to rate workers.
- Create document periods to create performance documents from the same template for different periods.
- Preview the details.

Configure the General Step

In the General step, specify the eligibility profile and the roles participating in the evaluation process.

1. Go to **My Client Groups > Performance > Performance Template > Add**.
2. In the New Performance Template page, the template type is Standard by default. Leave it as is.
3. Enter the name of the standard performance template.
4. Enter the Start and End dates.
5. Set the status to Active.
6. Select the document type you want to associate to the performance template. This is the document type that you created using the Create Document Types task.
7. In the Eligibility Profile section, add eligibility profiles to restrict the performance documents to eligible employees.
8. In the Contributors section, add the roles that will evaluate the performance document. Include the worker role and manager role. Specify the manager type.
9. In the Participation section, enter the number of participants:
    a. **Specify the minimum number for each participant role required in total**. To enforce this, you must configure the minimum number of participants. This enforcement is applicable to workers only if they can select or send participant feedback requests.
    b. **Specify the maximum number of participants allowed in total**.
10. In the Participation section, click **Add Participant Role**. If a participant role is configured to view other contributor evaluations, an icon displays to indicate this
    a. Click **Add** and add each of the following roles that you created using the Performance Roles task. For example, peer, matrix manager.
11. Click **Save**.

12. Click **Continue** to go to the *Process* step.

Configure the Process Step

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

1. From the Process Flow list, search for and select the performance process that you created in Create Process Flows.
2. Enter the number of days before the tasks are due to send both standard and critical alerts. If you choose to repeat the alerts are sent until the task is completed.
3. In the Rating Calculation section, select Calculate ratings.

Select this option	To
Calculate ratings	See automatically calculated ratings. 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.
Display calculated ratings to worker	Display the ratings to workers.
Display calculated ratings to manager	Display the ratings to managers.
Display calculated ratings to participants	Show the calculated ratings to other participants.
Display calculated ratings to participants who can view other contributor evaluations	Show the calculated ratings to other participants.
Include digital signature	Verify that workers are the people submitting the performance document. This 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.
Display Check-Ins	Display check-in details in the performance document.
Display Requested Feedback	Display requested feedback in the performance document.

4. In the Participant Options section, select any of the following options:

Select this option	To
Auto-populate matrix managers of the worker as participants	HR specialists can select this option so that the performance document is automatically assigned to the matrix manager when they are selected as a participant in the participants list.
Workers can view the participants added by manager or HR	Enable workers to see the participants added by their manager or HR.
Allow matrix managers to access worker document automatically	Enable matrix managers to access the document as soon as it's created in the Participant Feedback

Select this option	To
	for Others region of their Performance page. In the Manager Type list, select Specific Manager Types. This means that you need to select a specific manager, such as the project manager, regional manager.
Worker can assign participant roles that can view worker and manager evaluations	Enable workers to assign participant roles that can view manager as well as their evaluation feedback.
Manager can assign participant roles that can view worker and manager evaluations	Enable managers to assign participant roles that can view worker as well their evaluation feedback.

5. Click **Save**.
6. Click **Continue** to go to the *Structure* step.

Configure the Structure Step

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

After you add each section, you also define which roles have access to these sections and define processing settings for each role.

1. Click **Select Existing Section.**
2. From the list, search for and select a content section. This is the section you already created using the Performance Template Sections task.
3. In the Comments section, select **Enable section comments**, if not already selected.
4. In the Processing by Role section at the bottom of the page, click **Add** to add all the roles that require access to the section, whether to provide ratings or feedback, or view the section. For example, if your organization requires only managers to rate goals, but workers to only view the goals and ratings, you must add both the manager and worker roles to that section.
5. From the Role list, select a role.
    a. For Item Comments and Section Comments, leave **Optional With Warning** selected. This displays a warning message when no ratings or comments are provided. This is the default value for all ratings and comments.
    b. Select **Yes** for Share Ratings and **Yes** for Share Comments. This determines whether to share with workers the ratings or comments that managers or participants provided in the Profile Content, Goals, or Overall Summary sections.
    c. Select **Yes** for Update Profile. This determines whether to update the worker profile with the ratings provided by the manager and any content items that were added to the performance document that aren't in the worker profile. If you elect to update profiles for competency sections, you can also specify the instance qualifier to identify that the source of the proficiency level provided by the manager for competencies is the performance document. Instance qualifiers must be set up and maintained in Oracle Fusion Profile Management.
    d. Select **Yes** for View Participant Names and View Participant Roles. This determines whether managers, workers can view participant names and roles.
6. Repeat steps 4 and 5 to add other roles as required.
7. Click **Save**.

8. Click **Continue** to go to the *Document Periods* step.

Configure the Document Periods Step

In the Document Periods step, define the review period for the standard performance document, specify eligibility profiles, if any.

1. In the Document Periods section, click **Add**.
2. Enter the name of the document period.
3. Search for and select the review period. The review period typically corresponds to the talent business period, such as a calendar or fiscal year, or semi-annual period.
4. In the start and end dates of the performance document, leave the default dates selected.
5. Enter the short name of the performance document.
6. In Eligibility Profile for the Period, click **Add**. Then search for and select a profile. Eligibility profiles you set at the template level are inherited by document periods. You can also set additional profiles at the period level.
7. In Document Types for Interim Evaluation, click **Add**, then select **Annual Evaluation**.
8. In Due Dates, select due dates for each task in a logical sequence.
9. Click **Save**.
10. Click **Continue** to go to the *Summary* step.

Review Summary

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

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

4 Create Performance Documents

Create Performance Documents

Before you create standard performance documents for workers, verify these prerequisites:

- The worker's assignment start date is before the performance document end date.
- The worker's assignment has a manager. If a worker doesn't have a manager, for example, they're the head of the company, then you can create a dummy manager for them.

You can create performance documents for any type of worker including employees, contingent workers, and nonworkers, depending on business needs.

Who Can Create Performance Documents

As an HR specialist you can create performance documents for anyone for whom you have security access.

You can create standard performance documents in different ways:

- Using the Performance Document task for specific workers.
- Using the Process Mass Actions for Performance Documents task for groups of workers.
- Running the eligibility batch process (only if an eligibility profile is associated with the performance document period in the performance template).
- Using HCM Data Loader for multiple workers at the same time.

When you create the document, goals and competencies may be added depending on the configuration.

Run the Eligibility Batch Process

You can run the Eligibility Batch Process to determine which standard performance documents a population of workers is eligible to use for their performance evaluation.

If you don't choose to create performance documents while running the eligibility process, you can create them later using the other methods.

1. Go to **My Client Groups > Performance > Eligibility Batch Process**.
2. Select Assign Performance Document from the Batch Process Type list.
3. Enter values for these parameters:
    - Effective as of Date: This determines when a worker population is eligible for performance documents and check-in templates.
    - Review Period: Using this, you can find a performance document template that matches the selected review period.

- Create Eligible Performance Document: If you select this, the application automatically creates performance documents for each eligible employee.

4. Choose whether to permanently delete the results of historic performance eligibility batch processes to improve system performance. Purge any results data older than the specified date.
5. Click **Submit**.

Create Standard Performance Documents for Specific Workers

Here's how you create standard performance documents for specific workers.

1. Go to **My Client Groups > Performance > Performance Documents**.
2. Search for eligible workers by specifying a review period and performance document name. Then, type the name of a worker, manager, or department to start the search.
3. Select the workers for whom you want to create performance documents.
4. Click **Continue**.
5. (Optional) Change the dates, if required. These must be within the document period start and end dates defined in the performance template.
6. (Optional) Select the manager of the performance document. The manager must have access to the worker to manage the document.
7. (Optional) Select a reason for creating the document.
8. Click **Create**.

Create Standard Performance Documents for a Group of Workers

Here's how you create standard performance documents for groups of workers.

1. Go to **My Client Groups > Performance > Mass Actions for Performance Documents.**
2. Click Create Documents.
3. In the New Process to Create Performance Documents page, select the review period for which you want to create the performance documents.
4. Select a performance document from the performance documents list.
5. (Optional) Select a reason for creating the performance documents.
6. Select the population type and then select the specific worker, manager, business unit, or department for whom you want to create the performance documents.
7. Select Active for assignment status.
8. Click Submit.

5 Sync Content in Performance Documents

Run Scheduled Processes to Sync Content in Performance Documents

After the performance document is assigned to a worker you can keep the performance document content such as goals and competencies in sync by running the following scheduled processes.

Use the Scheduled Process area to run the processes listed in the following table.

Process	What it does	Parameters
Synchronize Goal Data in Performance Documents	Run this process to sync goal data in performance documents with the goal data in Goals Center and Career Development.	Action: Select to preview the changes before submitting or select Update to submit the changes. Review Period: Use the review period to help filter and find the goal plans you want to process. Goal Plans: Select the goal plans from which data needs to be synced to performance documents. Worker Person Number: Specify the person numbers of the workers for whose performance documents the update is applicable.
Synchronize Person Profile Competencies in Performance Documents	Run this process to add competencies that haven't been brought into the performance documents automatically using the person profile competency in a performance template.	Action: Select to preview the changes before submitting or select Update to submit the changes. Review Period: Use the review period to help filter and find the goal plans you want to process. Performance Document Name: Select the performance document in which competencies need to be synced. Worker Person Number: Specify the person numbers of the workers to whom the performance document is applicable.