

# Oracle Taleo Enterprise Edition

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## Implementing Performance Security and Permissions

**20B**



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# Preface

This preface introduces information sources that can help you use the application and this guide.

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# 1 Security in Taleo Performance

## Security Overview

Security is the combination of what type of information you can access, whose data you can view, and what actions you can perform.

Conceptually, security is broken down into three main pillars, focused on object ownership, hierarchy, and coverage areas. Other components, such as mentoring, matrix management and talent pools lead to slight variations on the three main themes.

Practically, security is handled by a combination of user type permissions, user accounts, coverage areas, and groups, which control access to functional domains. The placement of organization, location, and job fields within coverage areas and groups helps in segmenting user's access.

## Security Components

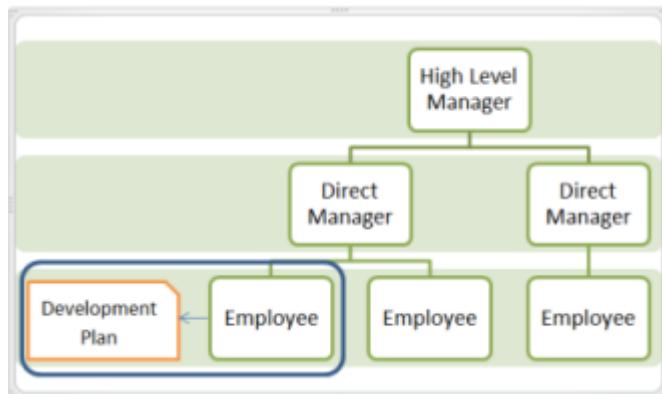
The majority of Taleo Performance security conditions can be met using the controls provided by object ownership, hierarchical control of objects and coverage areas.

These impact the relationship a user has with the different domains in Taleo Performance.

### Object Ownership

Ownership security means a user can access objects they own.

Typically when a new object is created for someone and assigned to them, they become the owner of that object. For instance, when an employee creates a development activity for themselves or when a manager creates a goal for an employee. The majority of the time this refers to the employee's perspective, however; for position management it is based on the position manager's perspective. There can only be a single owner of an object.

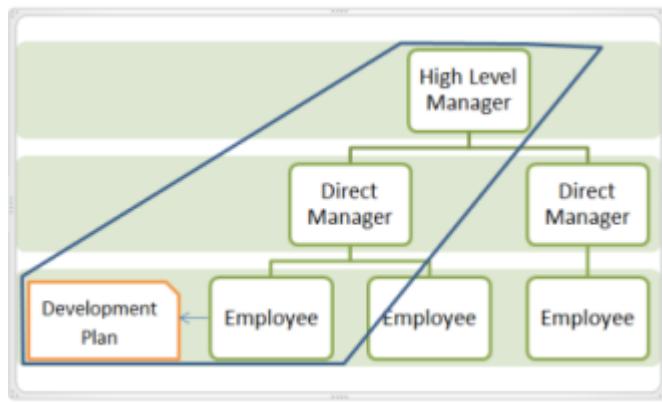


## Hierarchical Control of Objects

Hierarchical security is based on a hierarchical structure - the reporting relationships that exist within an organization.

This supports the employee organizational structure with two levels of hierarchical security: direct or indirect. Direct provides access to the details of a line manager's direct report (or level 1 in relation to the diagram). Indirect access can give higher level managers (level 2 & more) the same rights to the employee's information as the line manager. For example, a vice-president might have rights to assign a goal to all people who report below him, not just his direct reports.

Taleo Performance supports hierarchical control based on the employee organizational structure, meaning that access to objects is dependent on the user's relationship to the owner of the object.

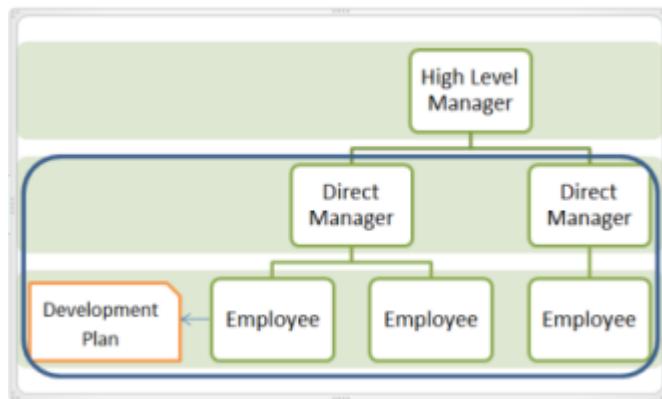


## Coverage Areas and User Groups

A coverage area is a combination of functional domains, organizations, locations, and job fields that can be associated with an individual - or combined in user groups and associated with multiple users - to control their access to people and parts of Taleo Performance.

Coverage areas must consist of at least a single functional domain, but otherwise can include any number of domains, organizations, locations and job fields. The items included in a coverage area are what the user associated with the coverage area has access to. Once a user is associated with a coverage area - either individually or via a group - they can only see other users who also have the same association. For instance, if your coverage area includes the engineering organization, then only employees in that organization will be displayed when you run a search.

Typically in large organizations it is not realistic or scalable to apply coverage areas to users individually and groups are preferred. Groups using coverage areas enable security to be applied that mirrors how your organization is structured. An additional benefit of using groups is that Taleo Connect Client can be used to assign groups to employees, saving the time of manually assigning them in SmartOrg.



Combining coverage areas and groups increases your access to Taleo Performance, much in the same way that user type permissions are cumulative and offer the widest access. If you have one coverage area with the Performance Reviews domain and the location Canada and add another coverage area with Goal Plans and United States, you can see employees who meet either coverage area criteria.

These are referred to as OR relationships, in that employees who fit either criteria are displayed to the user. They do not need to match both, which would be an AND relationship.

## Functional Domains for Coverage Areas

These functional domains can be added to coverage areas to provide users with access to the corresponding modules in Taleo Performance.

Functional domain information, in regards to user type permissions, is available in the section [Performance User Type Functional Domains](#).

Name	Function
Career Plans	This controls access to the Career Plan module.
Development Plans	This includes the Development Plan module and development activities. Activities can be created in context in different modules outside of the development plan module.
Employee Metrics	These can be displayed throughout Taleo Performance, such as the talent profile and performance card.
Employee Profile	This controls access to the overall talent profile object, however; this does not include all of the content of the talent profile. For instance, access to employee metric data on the talent profile requires the employee metrics domain. This also controls access to the people selector.
Goal Plans	This controls access to the Goal Plan module.
Performance Reviews	This controls access to the Performance Reviews module and managers also get access to the Performance Review Management view, which shows all the reviews they are responsible for in list form.
Succession Employee Search	This is required be able to search for people to add to succession plans and talent pools.

Name	Function
Succession Plans	This controls access to the Succession Plan module and Talent Pools.
Team Management	This controls access to actions in the Team Management and Talent Browser such as, adding an employee, adding a matrix manager, changing an employee's manager, and changing an employee's OLF values.

## User Type Security Permissions

User type permissions are the main method used for controlling security in Taleo Performance. This section provides information on these permissions and how they affect access to modules and the actions you can complete in Taleo Performance.

Access to Taleo Performance features are controlled by user type permissions. Permissions are organized by functional domains. For instance, Goal Plans, Performance Reviews and Employee Profiles are specific domains that can have unique user permissions configured for each user type. For each domain, the administrator can configure whether the user type will have read-only access (View) or full edit rights (Manage). With a goal plan a line manager may have View and Manage permissions, while with an employee profile the line manager may only be able to view it.

View and Manage permissions can be applied to the user's own data, their direct reports, the employees of those direct reports, employees within the user's coverage area and individuals the person mentors.



**Note:** Having manage access does not imply view access, it must also be selected.

Permissions are cumulative and the most expansive access related to those permissions is applied to the actions of a user. For instance a user may be assigned a line-manager user type, which enables them to edit the goals of their direct reports only. In addition, the user may also be associated with a user type that provides view and manage permissions for goal plans associated with the same group as the user, which would then allow the user to edit non-direct report goals.

## Default User Types

Performance provides three basic user types that can be used as the foundation for configuring different user types for your implementation.

Depending on the requirements of your organization and the modules that are used, your may need to create a number of customized user types. Most users typically fall into an employee, manager, or administrator category and the default user types make it easy to create your customized user types accordingly.

Performance Default User Types	
Name	Code
HR Administrator	PM_HR_ADMINISTRATOR

Performance Default User Types	
Name	Code
Manager	PM_MANAGER
System Administrator	PM_SYSTEM_ADMIN
Employee	PM_EMPLOYEE

## HR Administrator

The HR Admin user type provides access to HR Administration Tools, options for managing workflow processes of items like performance reviews and goal plans, as well as general administrative oversight into your Performance implementation.

The ability to use the HR Administration Tools is the most important part of the HR Administrator's permissions. These tools enable the administrator to troubleshoot approvals and restart them or complete them as necessary. This enables the administrator to act as the first line of support and potentially quickly resolves problems for managers and employees.

It is recommended that there be at least one individual assigned to the HR Administrator - Global role, to ensure that there is never an object (goal plan, succession plan, performance review, career plan) that does not have an HR Administrator responsible for it.

## Manager

The manager user type gives managers access to work with information on their reports for all functionalities across Performance.

Managers can view and edit information for their employees in each of the modules. By default, managers have read and write access to their direct reports and subsequent levels of employees.

## Employee

The employee user type is for those users in an organization, who do not have line manager or system admin duties and do not require access to HR Administration Tools or the Manager Center.

By default, an employee has read and write access to their own records and information, but not those of anyone else.

## Additional User Types

The Matrix Manager and Mentor user types enable any employee in the application to take those roles.

## Matrix Managers

Matrix management provides the ability to assign employees, for a specific period, to matrix or proxy managers that can participate in reviews, goals and any other tasks on behalf of the primary manager.

The matrix management feature provides important management functions:

- Allows managers to share their work responsibilities and administrative tasks with matrix managers who may act on their behalf.

- Allows managers or HR administrators to appoint temporary resource managers. In case that a primary manager is unavailable or on a leave, their tasks and performance management functions may be conducted by the matrix manager.
- Allows matrix managers to participate in performance management functions of employees who work in cross functional teams. It is important to note that to be entitled to participate in a review, matrix managers must also be made review collaborators.

## Mentors

Mentor user type permissions enable a user to take on the responsibilities of a mentor without needing to worry about organizational or hierarchical structures.

Mentor View/Manage permissions can be set for any functional domain that a mentor could require access to, such as development plans, career plans and employee profiles.

## Performance User Type Functional Domains

User type permissions are organized by functional domains.

A user type can accumulate permissions for multiple functional domains and gain access to many products and modules within them. For the functional domains to be available, the corresponding module must be activated in Configuration > [SmartOrg] Administration > Product Configuration. You must typically have support user access to activate modules.

## Performance Reviews

Users must have View permissions to access the Review links and Manage permissions to create and edit performance reviews.

Along with the typical view/manage and administration tools permissions, managers can have additional access to the Performance Review Management view with the Access via Manager Center permission. This permission grants the user access to the Performance Review Management view, from the 'Team Reviews' link displayed under the Navigation bar's More dropdown heading. However, the user needs viewing and/or managing rights to performance reviews to be able to view/manage reviews. When performance reviews are accessed via the Navigation bar > More dropdown > Team Reviews link, the user is presented with a list of reviews, which offers a new management view that can be used to display a specific group of reviews and to take action upon multiple reviews at once if needed.

## Succession Plans

Users must have View permissions to have access to the Succession Plan links and Manage permissions to create and edit succession plans.

With the appropriate view and manage permissions users can complete tasks such as, creating succession plans, adding and removing successors, requesting approvals, and ranking successors. While the Succession Plan module is required for Talent Pools to be available, Talent Pool user permissions are kept in the Common functional domain.

## Goal Plans

Users must have View permissions to have access to the My Goal Plan and Goal Plan links and Manage permissions to create and edit goal plans.

Along with allowing access to goal plans from HR Administration tools, the Access administration tools permission enables you to see which goal plan template is used for the goal plan you are currently viewing in Taleo Performance.

## Career Plans

Users must have View permissions to have access to the Career links and Manage permissions to create and edit career plans.

## Development Plans

Users must have View permissions to have access to the Development links and Manage permissions to create and edit dev plans.

As development activities can be created in different contexts throughout the system, it is not enough for a user to have access to a certain module, they must have the development plan permissions as well. For instance, while you do not need development plan user permissions to use talent pools, if you want to assign development activities to a talent pool member then you need them.

## Employee Metrics

Employee metrics represent employee information that can be used for analysis or calibration purposes or to show summary information about an employee.

While metrics user type permissions control overall access to metrics in Taleo Performance, configuration settings control which specific metrics are displayed and editable.

The employee metrics that are configured to be displayed and/or edited are reflected in various locations:

- in the Talent Profile
- in the employee's performance card and summary profile
- in the Employee Details window, available from the performance card
- in the Talent Snapshot

Employee metrics can also be used as dimension types for the X and Y axes in matrices. This can affect which people are automatically rated on a matrix and which people can have their metrics updated. Users with fewer employee metric permissions will typically see a larger unrated population.

## Team Management

Team Management provides managers with a self-service tool for performing employee changes and maintaining information about their employee-manager relationships.

The team management options are available from Performance Cards in the Manager Center and from HR Administration Tools. Users must have Access permission to create new requests via the Request Employee Change and Add Employee Go to menu options. To cancel a change request the user must have general Access permission and be the owner of the approval request or have the Access administration tools permission.

Following is a list of possible team management actions:

- Add an employee from another team
- Add a matrix manager
- Change an employee's manager, thus moving the employee to another team
- Change an employee's organization
- Change an employee's location

- Change an employee's job field

Team management permissions also control access to Talent Search, Native Reporting and setting up Matrix Manager relationships. Instead of having product settings to enable these features, they are enabled via their permissions.

## Employee Profile

These view and manage permissions control user's access to the Talent Profile.

Employee profile permissions grant access to the overall talent profile object, however; they do not necessarily grant access to all of the sections of a talent profile. For instance, the ability to edit the metrics displayed on the talent profile is controlled by **Configuration > [Taleo Performance] Administration > [Employee Management] Metrics Configuration**.

Employee profile permissions also control access to the People Selector from the **Employee > Other...** option. Without permissions more expansive than **View > If this user is the owner**, users will not be able to search for other employees while within a module. These permissions also impact who can upload an employee photo.

## Administration

This provides access to the Taleo Performance section of the Configuration module.

Selecting Allow system administration provides access to all of the configuration sections required for configuring Taleo Performance, with the exception of SmartOrg. To be able to access SmartOrg and set up users the **Manage User Accounts** permission is required.

## Business Goals and Projects

There are only single View and Manage permissions for business goals and projects.

These options add Business Goals and My Projects to the user's Navigation bar under the More dropdown, and enables the user to view those objects. The business goals you can view are dependent on which business organizations you have access to.



**Note:** These settings are not used for employee goal plans.

## Other User Type Domains

There are a few additional domains, sitting outside Performance that impact the product.

### Pools

While pools is currently only available within Taleo Performance, the permissions have been placed in a Common domain.

The permissions for talent pools do not work in the same manner as for other domains. A key difference between talent pool permissions and other components is that talent pools have explicit creation and deletion permissions nested within an umbrella manage permission. With only the Manage permission, the user can edit pools, but cannot create them. Once the Allow creating and deleting pools permission is selected then the user can begin adding new pools. Also to change pool ownership, users must have the high level View and Manage permissions.

## Compensation Data

The view and manage compensation data permissions control the ability to edit the data in those areas. This includes current salary, salary increase, target bonus and non-vested stock. This only impacts how compensation data is handled in the talent profile. Compensation security in Taleo Enterprise is managed separately.

## Succession Employee Search

This domain is only available when you are selecting functional domains to include in a coverage area associated with a user group.

This domain controls who users can search for within Succession Plans and Talent Pools. When a user within a group that has the Succession Employee Search domain associated with it, searches for people to add to a succession plan or pool, they will only be able to search amongst other people within that group.

## Learning

In addition to Learn user type permissions, Development Plan user permissions are required to successfully use Taleo Learn functionality within Taleo Performance.

Unlike other functional domains, which typically provide view and manage access to different levels of users, Learn permissions map user types in Taleo Performance to user types in Taleo Learn. For instance, you can access Learn as a default user, supervisor, administrator, or as a custom user type.

Please consult Taleo Learn documentation for full details on user permissions within the Learn system.



## 2 Examples of Security in Performance

### Examples Overview

The following examples try to cover some of the basics of permissions and coverage areas.

Each example consists of a description, permissions configuration, and quick walkthrough.

### Using the Talent Profile

The Talent Profile is a central piece of Taleo Performance that provides key information on employees.

Jack is a high-level manager with over 50 direct and indirect reports. He does not want to change details of indirect reports himself, but does want to view talent profiles when required during succession planning or during the review process. Elizabeth reports to Jack, but also has a number of direct reports whose talent profile she needs to view and update. Steve, who reports to Elizabeth, can access and edit some of his own details, but he should not be able to view other information which is found in the employee metrics section.

### Configuration

To ensure the access is as expected the administrator must set up the Employee Profile user type permissions for the managers and employees, set up the talent profile competencies, and set up the employee metrics permissions.

Jack will have instances where he will be a higher level manager, direct manager, and employee and requires user permissions to account for each situation. Elizabeth does not have indirect reports and only requires direct manager and employee permissions, while Steve has no managerial responsibilities.

User Type Permissions			
Name	Jack	Elizabeth	Steve
Performance > Employee Metrics > View - If this user is a higher level manager	Yes		
Performance > Employee Profile > View - If this user is a higher level manager	Yes		
Performance > Employee Metrics > View - If this user is the direct manager	Yes	Yes	
Performance > Employee Metrics > Manage - If this user is the direct manager	Yes	Yes	
Performance > Employee Profile > View - If this user is the direct manager	Yes	Yes	
Performance > Employee Profile > Manage - If this user is the direct manager	Yes	Yes	

User Type Permissions			
Name	Jack	Elizabeth	Steve
Performance > Employee Profile > View - If this user is the owner	Yes	Yes	Yes
Performance > Employee Profile > Manage - If this user is the owner	Yes	Yes	Yes

The display of Talent Profile competencies is also controlled at the user type level, but these settings are found in **Configuration > [Taleo Performance] Administration > [Employee Management] > Talent Profile Competency Configuration**.

 **Note:** The specific employee metrics that can be displayed are controlled by the **Configuration > [Taleo Performance] Administration > [Employee Management] Metrics Configuration** settings, while the specific talent profile sections and fields that are displayed are controlled by the **Configuration > [Taleo Performance] Administration > [Employee Management] Talent Profile Section Configuration** settings.

## Walkthrough

1. Before discussing Steve's pay raise with Jack, Elizabeth may have wanted to manually adjust some of Steve's metrics to better reflect his past twelve months. After a particularly productive year, she decides to change his **Employee - Potential** metric from Medium to High.
2. When Jack is involved in discussing Steve's pay raise with Elizabeth, after the completion of the annual performance reviews, he can select Steve's Talent Profile. When he does so he can see his most recent review ratings, potential and competency ratings before approving the pay raise suggested by Elizabeth. But as he does not need to make any changes, just viewing the profile is sufficient.
3. Steve can only view and access his own profile, except Metrics which are hidden from him. But as he has completed his Prince2 project management certification, he can add that to the **Certifications** section.

## Using Coverage Areas

Coverage areas and user groups control access to users based on a combination of employee organization, location and job family. Users can have different coverage areas for each functional domain.

There are two HR Administrators with standard user type permissions for an administrator; however, one is responsible for the North East and the other for the Mid Atlantic region. This is reflected in their coverage areas, where their Functional Domains include all of the Performance modules and are the same, except that one has the Locations value North East and the other has Mid Atlantic. This ensures that they can only view and access employees that work in their region.

As Helen's current job has her in the North East region, her details can be viewed by one of the HR Administrators. The employee's location is taken from the **Employee Information > Location** field. Similarly, this is where the Organization and Job Role fields are, that can also be used with coverage areas.

## Configuration

The user type permissions are the standard HR Administrator permissions.

Settings from both user group/coverage area and employee information are used when checking to see if an employee should be accessible to the user.

Settings	
User Group Constraints	Corresponding Employee values
Coverage Areas > Organizations	Employee Information > Organization
Coverage Areas > Location	Employee Information > Location
Coverage Areas > Job Fields	Employee Information > Job Role

## Walkthrough

1. Helen is transferring from the North East to the Mid Atlantic and the overnight feed from the HRIS system updates Helen's record in Taleo Performance to reflect this.
2. From that point on, when the North East HR Admin views HR Administration Tools and selects a module such as Performance Review or Goal Plan, Helen is no longer included in the list.
3. The HR Admin for the Mid Atlantic now has Helen included in his list of employees when viewing modules in the HR Administration Tools.
4. If the company was to realign its personnel in the future and the North East HR Admin assumed the same role for the Mid Atlantic and added the location to his coverage area, then Helen would again be visible to that HR Admin.

## Talent Pools

Talent pools help organizations plan and review their workforce beyond position-based succession plans, along with providing the ability to create groups of people for the purposes of tracking, monitoring and actioning.

Diane, the HR Manager, is the owner of the talent pool. This enables her to create it, add pool members and change owners if required. Kelly and Sam are departmental managers who will populate the pool and work with Diane to evaluate the employees and build a strong group of pool members. The focus of the pool is on building a group of talented employees for the company's North American operations.

## Configuration

It is not only the talent pool permissions that are required, but to see the metrics displayed in the list view employee metrics permissions must also be granted.

User Type Permissions			
Name	Diane	Kelly	Sam
Common > Pools > View - If this user is the pool owner or a pool user	Yes	Yes	Yes
Common > Pools > Manage	Yes		
Common > Pools > Manage - If this user is the pool owner or a pool user		Yes	Yes
Performance > Employee Metrics > View	Yes		
Performance > Employee Metrics > View - If this user is the direct manager		Yes	Yes

User Type Permissions			
Name	Diane	Kelly	Sam
Performance > Employee Metrics > View - If this user is a high level manager		Yes	Yes

In addition to the user permissions a North American user group will be created and Kelly and Sam will be added to it.

- The coverage area that is added to their North American user group will include all of the Performance functional domains, as well as the locations Canada, Mexico, and United States.
- The location constraint means that they can only view items, such as performance reviews and development plans, for employees that are based in one of those three regions.
- The Succession Employee Search domain is only available in this context. It is used to control which employees can be found when running a search from within a Succession Plan or Talent Pool. The employees Kelly and Sam can search for are limited to those in the North American user group.

#### Functional Domains | Add

Domain > Subdomain
Performance > Team Management
Performance > Employee Metrics
Performance > Development Plans
Performance > Career Plans
Performance > Goal Plans
Performance > Succession Plans
Performance > Performance Reviews
Performance > Succession Employee Search
Performance > Employee Profile

#### Organizations | Add

Name
This group is not associated to any specific element and

#### Locations | Add | Remove All

Name
Canada
Mexico
United States

## Walkthrough

1. Diane can access **[Navigation bar] > More dropdown > Talent Pools** and create a talent pool. This includes adding Kelly and Sam as pool users.
2. As pool users, they can now log into Taleo Performance and begin adding pool members. They can search within their reporting structure and network or they can use keywords to find users in the system.

Being included in the North American user group, their search results will be limited to employees whose location is either Canada, Mexico, or the US. This does not impact searches for candidates, as candidates do not have the user account OLF values that employees have, which are checked when a search is run.

3. After they have added the pool members, when they are in List view they will only be able to see the Review Rating, Risk of Loss and Potential values for employees they are line managers for or who sit under them in the organization structure. If they see different member's metrics it is because Kelly and Sam have different hierarchical relationships with those members.

If they have added candidates to the pool, candidates do not have metrics so there are no values to display.

## Mentoring

Mentoring occurs outside of the typical hierarchical and object based security concepts and provides a simple method to give someone access to another user's information.

Henry is a senior consultant with deep-domain experience in his field and has been asked to mentor Bill and Catherine. He is not in their direct reporting line and lacks any managerial permissions for accessing their details. Because of this, specific mentoring user permissions can be used to give Henry the required access.

## Configuration

To help mentor, Henry will definitely want view access to their goal plans and development plans, along with their employee profiles to see where they have the largest gaps to close. Having manage access for development plans enables him to directly assign development activities.

There are no special permissions for mentees.

User Type Permissions	
Name	
Performance > Performance Reviews > View - If this user is a mentor	
Performance > Performance Reviews > Manage - If this user is a mentor	
Performance > Goal Plans > View - If this user is a mentor	Yes
Performance > Goal Plans > Manage - If this user is a mentor	
Performance > Career Plans > View - If this user is a mentor	Yes
Performance > Career Plans > Manage - If this user is a mentor	
Performance > Development Plans > View - If this user is a mentor	Yes
Performance > Development Plans > Manage - If this user is a mentor	Yes
Performance > Employee Metrics > View - If this user is a mentor	
Performance > Employee Metrics > Manage - If this user is a mentor	
Performance > Employee Profile > View - If this user is a mentor	Yes
Performance > Employee Profile > Manage - If this user is a mentor	

## Walkthrough

1. From the Performance Card, Bill and Catherine's supervisor uses the **Request Mentoring** option to assign them to Henry as mentees.
2. Henry logs into Taleo Performance, and can select **[Navigation bar] > More dropdown > Mentoring Center**, and send feedback regarding Bill or Catherine, as well as break the mentoring relationship.
3. To view his mentees' details, he could select **[Navigation bar] Profile** and then select **Employee**.
4. By using a keyword search, Henry can select either Bill or Catherine and display their Talent Profile.
5. Now he can select from Goals Plans, Career Plans, or Development Plans.
6. Selecting Development Plan enables Henry to edit their current plans and to give them development activities that would help close their skills gap.

## Matrix Management

Matrix management provides the ability to assign employees for a specific period, to matrix or proxy managers that can participate in reviews, goals, and other tasks on behalf of the primary manager.

Aasif works in the Shared Services dept and reports to Samantha. The Shared Services dept acts as a service bureau for other groups in the company and Aasif's role is to work on various project teams. He has been placed on Lewis' project team for the next six months and Lewis will serve as his proxy manager for that period.

To provide granular access to Aasif's details, matrix management user type permissions can be applied to each module, as opposed to a blanket setting for assuming the exact access Samantha has. In this way Lewis can have access to those modules that are impacted by Aasif's project work, such as Goal Plans, Development Plans, Performance Reviews and Employee Profile.

## Configuration

Lewis requires additional user type permissions. The View/Manage permissions selected will enable him to take part in setting the goals and reviewing the results of the project Aasif will work on for Lewis. In case any development activities are tied to goals, access to development plans has been added as well. Having access to the talent profile is fairly standard, so the Employee Profile permission is also selected.

Samantha must have the Access Manage Matrix Manager permission, otherwise she will not be able to create the matrix manager relationship between Lewis and Aasif from the Talent Browser.

There are no special permissions required for delegated employees.

User Type Permissions		
Name	Lewis	Samantha
Performance > Performance Reviews > View - If this user is a matrix manager	Yes	
Performance > Performance Reviews > Manage - If this user is a matrix manager	Yes	
Performance > Goal Plans > View - If this user is a matrix manager	Yes	
Performance > Goal Plans > Manage - If this user is a matrix manager	Yes	
Performance > Development Plans > View - If this user is a matrix manager	Yes	
Performance > Development Plans > Manage - If this user is a matrix manager	Yes	

User Type Permissions		
Name	Lewis	Samantha
Performance > Employee Profile > View - If this user is a matrix manager	Yes	
Performance > Employee Profile > Manage - If this user is a matrix manager		
Performance > Team Management > Access Manage Matrix Manager		Yes

## Walkthrough

1. With the permissions set up and with Lewis assigned as a matrix manager with Aasif as his designated employee by Samantha, he can select **[Navigation bar] Profile** to display his own Talent Profile.
2. He can then select **Employee > Other** to display the People Selector and use **In my delegated employees** to find Aasif.
3. Aasif's Talent Profile is displayed in read-only view, with the exception of being able to add development activities to any competencies that are displayed, based on having the Development Plans View/Manager permissions.
4. Selecting **Module > Goal Plans** displays Aasif's goal plan and Lewis can add goals to the plan, based on the new project work.
5. During the life of the project, Lewis can go into the goal plan and make edits if there are any changes to the project work that affect the goals.



# 3 Performance Security FAQ

## FAQ: User Permissions and Access

The answers focus on security and user permission solutions.

### HR Administrators

**Q:** From **HR Administration Tools > Goal Plan**, not all of the goals in the system are being displayed, preventing me from acting on them. Are my permissions correct?

**A:** Check to ensure that the Goal Plan - View/Manage permissions are at the highest level without any restrictions. If that is the case, then there is likely a user group or coverage area restriction that is being applied via one of the user types associated with the HR administrator user account.

**Q:** How can I prevent one HR Administrator from accessing the review scores of another HR Administrator?

**A:** You can place the HR Administrators into a user group that does not include Performance > Performance Reviews functional domain. If there is a concern they could see the score via metrics, Performance > Employee Metrics could also be left out of the user group.

### User Groups and Coverage Areas

**Q:** What is the difference between user groups and coverage areas?

**A:** User groups include people who have the same access to the same information and objects, controlled by constraints added to coverage areas associated with the group. A coverage area can be included with a group or applied directly to an individual user account.

**Q:** With regards to coverage areas and user groups, does using OLFs create an AND or an OR constraint?

**A:** Prior to 10SP3 it may have created either, but since then they are OR relationships between the OLFs and functional domains.

### Talent Pools

**Q:** I can access and add members to a pool, but why can I not add Development Activities to a pool member?

**A:** You must have Development Plan View/Manage permissions to be able to Assign Activities via the Actions menu when you select a member.

**Q:** I just created a talent pool and want to assign a new owner, but the Owner field is grayed out. What access is required to change owners?

**A:** You must have the **Pools - Manage - Allow creating and deleting pools** to change owners.

**Q:** If I have access to a pool, will I be able to see the metrics of people I don't have access to?

**A:** No. The **Review Rating**, **Risk of Loss** and **Potential** metric values displayed in the List view will indicate NA or Not Specified.

**Q:** Can I search for people I don't have access to manage?

**A:** Yes. Using the keyword search in the People Selector you can add people you cannot actually manage; however, you cannot access their personal details.

**Q:** If an employee I don't have rights to manage is in a pool that I can manage, can I delete that person from the pool?

**A:** Yes. You can delete and add people you do not have rights to manage, however; you cannot access their personal details.

## Matrix Management

**Q:** As a matrix manager, I expected to receive delegated tasks, but have not.

**A:** There are **View/Manage - If this user is a matrix manager** permissions for each module and even if a user has been designated a matrix manager in Taleo Performance, they still need the required permissions.

**Q:** Why is the matrix manager unable to access the same modules as the employees delegated to them?

**A:** There are **View/Manage - If this user is a matrix manager** permissions for each module and even if a user has been designated a matrix manager in Taleo Performance, they still need those required permissions. Matrix managers do not automatically inherit the access rights of the manager they are replacing.

**Q:** Can an employee - ie. someone without direct reports - be a mentor or a matrix manager?

**A:** Yes. As both have specific user permissions, they are not constrained by the hierarchical user permissions structure.

**Q:** As a manager, do I need to have **If this user is a matrix manager** permissions to create a matrix manager relationship and delegate my tasks to a subordinate in the Talent Browser?

**A:** No. You specifically require the **Team Management > Access Manage Matrix Manager** permission, to have the option available in the Talent Browser.

**Q:** What is the difference between a mentor and a matrix manager?

**A:** A mentor is someone in your organization who can help develop fellow employees and who has access to the Mentoring Center for communicating with their mentees. Usually mentors are given view access so they can monitor the progress of their mentees and see where there are areas for improvement. Matrix managers are given managerial responsibility over another manager's employees and tasks. Typically they will need view and manage permissions to carry out this role.

## General

**Q:** How come I do not see the functional domain Performance when configuring user types?

**A:** It must be activated via **Configuration > [SmartOrg] Administration > [Production Security] Product Configuration**, for it to be displayed.

**Q:** How can Taleo Performance respect European privacy laws?

**A:** The granularity of the Performance - Employee Metrics and Performance - Employee Profile permissions enables them to be limited to just the employee if necessary or more elaborate access can be configured using groups and coverage areas.

**Q:** How can you limit which employees can request to add to their network?

**A:** By appealing to their professionalism and common sense. There are no user permission constraints for **My Network**.

**Q:** I have tasks assigned to me, but selecting them displays the message "You do not have the required permissions to see this task information". How can I complete tasks I do not have access to?

**A:** It is possible you had the required user permissions when the task was initially assigned, but due to a change in a user group, coverage area, or user type permissions your access has changed. Contact your system administrator who can reassign the tasks or provide you with access.

**Q:** Can we restrict who can view specific employee metrics, such as **Position - Critical** and **Employee - Risk of Loss**, via user type permissions?

**A:** No. While user permissions can be used to control who can see the whole of employee metrics or the talent profile, those individual fields are controlled by the **[Employee Management] Metrics Configuration** settings.

**Q:** I can edit most of the fields in the Talent Profile, but why are the Metrics fields uneditable?

**A:** You must have Manage access for **Performance - Employee Metrics** permissions.

**Q:** Can an executive be prevented from seeing data more than two levels down in their organization?

**A:** An executive can be restricted to their direct reports, but if access is required beyond that level, the **If this user is a higher level manager** grants access to all other levels.



# 4 Performance Security Appendices

## Appendix A - Default User Types

The three default user types in Taleo Performance can be used as the basis for bespoke user types required for your implementation.

### Default User Type Permissions

This table indicates which permissions the three default user types have, along with including the domains and permissions a Taleo Performance user could reasonably be expected to use in relation to Compensation and myTaleo. Domains are only available if the related module has been activated in Product Configuration.

Domain	Permission	Employee	HR Administrator - Global	Manager - Global
Recruiting > Candidates	General > Security level for external candidates (in edit mode) > confidential			
	General > Security level for external candidates (in edit mode) > general	Yes	Yes	Yes
	General > Security level for external candidates (in edit mode) > restricted			
	General > Security level for external candidates (in view mode) > confidential			
	General > Security level for external candidates (in view mode) > general	Yes	Yes	Yes
	General > Security level for external candidates (in view mode) > restricted			
	General > Security level for internal candidates (in edit mode) > confidential			
	General > Security level for internal candidates (in edit mode) > general	Yes	Yes	Yes
	General > Security level for internal candidates (in edit mode) > restricted			
	General > Security level for internal candidates (in view mode) > confidential			
	General > Security level for internal candidates (in view mode) > general	Yes	Yes	Yes

Domain	Permission	Employee	HR Administrator - Global	Manager - Global
	General > Security level for internal candidates (in view mode) > restricted			
Performance > Performance Reviews	Access administration tools		Yes	
	Access via Manager Center		Yes	Yes
	Manage		Yes	
	Manage > If this user is one of the authors	Yes		Yes
	Manage > If this user is the direct manager			Yes
	Manage > If this user is a higher level manager			Yes
	Manage > If this user is a matrix manager			
	Manage > If it belongs to the user's coverage area			
	Manage > If this user is a mentor			
	Manage > If it belongs to the user's coverage area or it is associated to a group to which this user belongs			
	View		Yes	
	View > If this user is one of the authors	Yes		Yes
	View > If this user is the direct manager			Yes
	View > If this user is a higher level manager			Yes
	View > If this user is a matrix manager			
	View > If it belongs to the user's coverage area			
	View > If this user is a mentor			
	View > If it belongs to the user's coverage area or it is associated to a group to which this user belongs			
Performance > Succession Plans	Access administration tools		Yes	
	Allow nominations			
	Manage		Yes	
	Manage > If this user is the direct manager of the related job position			Yes
	Manage > If this user is a higher level manager of the job position manager			Yes

Domain	Permission	Employee	HR Administrator - Global	Manager - Global
	Manage > If this user is a higher level manager of the job position manager			Yes
	Manage > If this user is a matrix manager			
	Manage > If it belongs to the user's coverage area			
	Manage > If it belongs to the user's coverage area or it is associated to a group to which this user belongs			
	View		Yes	
	View > If this user is the direct manager of the related job position			Yes
	View > If this user is a higher level manager of the job position manager			Yes
	View > If this user is a higher level manager of the job position manager			Yes
	View > If this user is a matrix manager			
	View > If it belongs to the user's coverage area			
	View > If it belongs to the user's coverage area or it is associated to a group to which this user belongs			
Performance > Goal Plans	Access administration tools		Yes	
	Manage		Yes	
	Manage > If this user is one of the authors	Yes		Yes
	Manage > If this user is the direct manager			Yes
	Manage > If this user is a higher level manager			Yes
	Manage > If this user is a matrix manager			
	Manage > If it belongs to the user's coverage area			
	Manage > If this user is a mentor			
	Manage > If it belongs to the user's coverage area or it is associated to a group to which this user belongs			
	View		Yes	
	View > If this user is one of the authors	Yes		Yes
	View > If this user is the direct manager			Yes
	View > If this user is a higher level manager			Yes

Domain	Permission	Employee	HR Administrator - Global	Manager - Global
	View > If this user is a matrix manager			
	View > If it belongs to the user's coverage area			
	View > If this user is a mentor			
	View > If it belongs to the user's coverage area or it is associated to a group to which this user belongs			
Performance > Career Plans	Manage		Yes	
	Manage > If this user is one of the authors	Yes		Yes
	Manage > If this user is the direct manager			Yes
	Manage > If this user is a higher level manager			Yes
	Manage > If this user is a matrix manager			
	Manage > If it belongs to the user's coverage area			
	Manage > If this user is a mentor			
	Manage > If it belongs to the user's coverage area or it is associated to a group to which this user belongs			
	View		Yes	
	View > If this user is one of the authors	Yes		Yes
	View > If this user is the direct manager			Yes
	View > If this user is a higher level manager			Yes
	View > If this user is a matrix manager			
	View > If it belongs to the user's coverage area			
	View > If this user is a mentor			
	View > If it belongs to the user's coverage area or it is associated to a group to which this user belongs			
Performance > Development Plans	Access administration tools		Yes	
	Manage		Yes	
	Manage > If this user is the owner	Yes		Yes
	Manage > If this user is the direct manager			Yes
	Manage > If this user is the high level manager			Yes

Domain	Permission	Employee	HR Administrator - Global	Manager - Global
	Manage > If this user is a matrix manager			
	Manage > If it belongs to the user's coverage area			
	Manage > If this user is a mentor			
	Manage > If it belongs to the user's coverage area or it is associated to a group to which this user belongs			
	View		Yes	
	View > If this user is the owner	Yes		Yes
	View > If this user is the direct manager			Yes
	View > If this user is a higher level manager			Yes
	View > If this user is a matrix manager			
	View > If it belongs to the user's coverage area			
	View > If this user is a mentor			
	View > If it belongs to the user's coverage area or it is associated to a group to which this user belongs			
Performance > Employee Metrics	Manage		Yes	
	Manage > If this user is the owner			
	Manage > If this user is the direct manager			Yes
	Manage > If this user is the high level manager			Yes
	Manage > If this user is a matrix manager			
	Manage > If it belongs to the user's coverage area			
	Manage > If this user is a mentor			
	Manage > If it belongs to the user's coverage area or it is associated to a group to which this user belongs			
	View		Yes	
	View > If this user is the owner			
	View > If this user is the direct manager			Yes
	View > If this user is a higher level manager			Yes
	View > If this user is a matrix manager			

Domain	Permission	Employee	HR Administrator - Global	Manager - Global
	View > If it belongs to the user's coverage area			
	View > If this user is a mentor			
	View > If it belongs to the user's coverage area or it is associated to a group to which this user belongs			
Performance > Team Management	Access		Yes	
	Access > If this user is the direct manager			Yes
	Access > If this user is a higher level manager			Yes
	Access > If it belongs to the user's coverage area			
	Access > If it belongs to the user's coverage area or it is associated to a group to which this user belongs			
	Access Talent Browser	Yes	Yes	Yes
	Access administration tools		Yes	
	Access centralized search		Yes	Yes
	Access Reporting			
	Access Manage Matrix Manager			Yes
Performance > Administration	Access application in maintenance mode			
	Allow system administration			
Performance > Employee Profile	Manage	Yes	Yes	Yes
	Manage > If this user is the owner	Yes		Yes
	Manage > If this user is the direct manager			
	Manage > If this user is the high level manager			
	Manage > If this user is a matrix manager			
	Manage > If this user is a mentor			
	Manage > If it belongs to the user's coverage area			
	Manage > If it belongs to the user's coverage area or it is associated to a group to which this user belongs			
	View	Yes	Yes	Yes

Domain	Permission	Employee	HR Administrator - Global	Manager - Global
	View > If this user is the owner	Yes		Yes
	View > If this user is the direct manager			Yes
	View > If this user is the high level manager			Yes
	View > If this user is a matrix manager			
	View > If this user is a mentor			
	View > If it belongs to the user's coverage area			
	View > If it belongs to the user's coverage area or it is associated to a group to which this user belongs			
Performance > Business Goals	Manage		Yes	
	View		Yes	
Grid > Knowledge Exchange	Access Knowledge Exchange		Yes	
	Manage Knowledge Exchange		Yes	
Grid > Solution Exchange	Access Solution Exchange		Yes	
	Manage Solution Exchange		Yes	
Grid > Talent Exchange	Access Talent Exchange		Yes	
	Manage Talent Exchange		Yes	
Compensation > Compensation Data	Manage compensation history			
	View compensation history			
	View compensation history > If this user is the owner			
	View compensation history > If this user is the direct manager			
	View compensation history > If this user is a higher level manager			
	View compensation history > If it belongs to the user's coverage area			
	View compensation history > If it belongs to the user's coverage area or it is associated to a group to which this user belongs			
myTaleo > Administration	Access the administration section			
myTaleo > Dashboards	Access default dashboard			

Domain	Permission	Employee	HR Administrator - Global	Manager - Global
Learning > Global Learning	Access Learn			
Learning > Learn	Access Learn as a default user			
	Access Learn as a supervisor			
	Access Learn as an administrator			
	Access Learn as user 1			
	Access Learn as user 2			
	Access Learn as user 3			
Common > Pools	Manage		Yes	Yes
	Manage > If this user is the pool owner or a pool user			
	Manage > Allow creating and deleting pools			
	View		Yes	Yes
	View > If this user is the pool owner or a pool user			

## Appendix B - User Type Permissions

These are all of the Taleo Performance user type permissions.

### List of Taleo Performance User Type Permissions

The settings in the following table relating to user permissions are found under Configuration > [SmartOrg] Administration > User Types. Most of the permissions are either for view or manage access and you must explicitly select view permissions for corresponding manage permissions to work. Manage permissions do not imply view permissions.

Permission	Description
Performance > Performance Reviews > View	When no constraint is selected, the user has read-only access to all employee reviews, current or not.
Performance > Performance Reviews > View - If this user is one of the authors	The user has read-only access to performance reviews for which he is the author. The author can be the employee when writing his self-assessment, the employee's direct manager or to whom the review was transferred to when writing the employee's review, or a review collaborator when writing the employee's review.
Performance > Performance Reviews > View - If this user is the direct manager	The user has read-only access to performance reviews of his direct reports, even if he is not the author.

Permission	Description
<b>Performance &gt; Performance Reviews &gt; View - If this user is a higher level manager</b>	The user has read-only access to performance reviews of employees within his organizational chart that are not direct reports. Non-direct reports in other parts of the organization cannot be viewed.
<b>Performance &gt; Performance Reviews &gt; View - If this user is a matrix manager</b>	The user has read-only access to performance reviews of employees for whom he is a matrix manager.
<b>Performance &gt; Performance Reviews &gt; View - If this user is a mentor</b>	The user has read-only access to performance reviews of employees for whom he is a mentor.
<b>Performance &gt; Performance Reviews &gt; View - If it belongs to the user's coverage area</b>	The user has read-only access to performance reviews of employees who share the same coverage area.
<b>Performance &gt; Performance Reviews &gt; View - If it belongs to the user's coverage area or it is associated to a group to which this user belongs</b>	The user has read-only access to performance reviews of employees who share the same coverage area and/or groups.
<b>Performance &gt; Performance Reviews &gt; Manage</b>	When no constraint is selected, the user has write access to all employee reviews, current or not.
<b>Performance &gt; Performance Reviews &gt; Manage - If this user is one of the authors</b>	The user has write access to performance reviews he has created.
<b>Performance &gt; Performance Reviews &gt; Manage - If this user is the direct manager</b>	The user has write access to performance reviews of his direct reports.
<b>Performance &gt; Performance Reviews &gt; Manage - If this user is a higher level manager</b>	The user has write access to performance reviews of employees within his organizational chart that are not direct reports. Non-direct reports in other parts of the organization cannot be edited.
<b>Performance &gt; Performance Reviews &gt; Manage - If this user is a matrix manager</b>	The user has write access to performance reviews of employees for whom he is a matrix manager.
<b>Performance &gt; Performance Reviews &gt; Manage - If this user is a mentor</b>	The user has write access to performance reviews of employees for whom he is a mentor.
<b>Performance &gt; Performance Reviews &gt; Manage - If it belongs to the user's coverage area</b>	The user can edit performance reviews of employees who share the same coverage area.
<b>Performance &gt; Performance Reviews &gt; Manage - If it belongs to the user's coverage area or it is associated to a group to which this user belongs</b>	The user has write access to performance reviews of employees who share the same coverage area and/or groups.
<b>Performance &gt; Performance Reviews &gt; Access administration tools</b>	This permission adds the Performance Review and Review Analytics links in the HR Administration Tools panel and entitles the user to access the performance reviews of employees within the organization and to perform administrative tasks.
<b>Performance &gt; Performance Reviews &gt; Access via Manager Center</b>	This permission grants the user access to the Performance Review management view, by displaying the Team Review link displayed under the Navigation bar's More dropdown. However, the user needs viewing and/or managing rights to performance reviews to be able to view/manage reviews.
<b>Performance &gt; Succession Plans &gt; View - If this user is the direct manager of the related job position</b>	The user has read-only access to succession plans for the positions of his direct reports.

Permission	Description
<b>Performance &gt; Succession Plans &gt; View - If this user is the direct manager of the job position manager</b>	The user has read-only access to succession plans for job positions managed by his direct reports.
<b>Performance &gt; Succession Plans &gt; View - If this user is a higher level manager of the job position manager</b>	The user has read-only access to succession plans for job positions managed by employees within his organizational chart that are not direct reports. Non-direct reports in other parts of the organization cannot be viewed.
<b>Performance &gt; Succession Plans &gt; View - If this user is a matrix manager</b>	The user has read-only access to succession plans of employees for whom he is a matrix manager.
<b>Performance &gt; Succession Plans &gt; View - If it belongs to the user's coverage area</b>	The user has read-only access to succession plans of employees who share the same coverage area.
<b>Performance &gt; Succession Plans &gt; View - If it belongs to the user's coverage area or it is associated to a group to which this user belongs</b>	The user has read-only access to succession plans of employees who share the same coverage area and/or groups.
<b>Performance &gt; Succession Plans &gt; Manage - If this user is the direct manager of the related job position</b>	The user has write access to succession plans for the positions of his direct reports.
<b>Performance &gt; Succession Plans &gt; Manage - If this user is the direct manager of the job position manager</b>	The user has write access to succession plans for job positions held by his direct reports.
<b>Performance &gt; Succession Plans &gt; Manage - If this user is a higher level manager of the job position manager</b>	The user has write access to succession plans of employees within his organizational chart that are not direct reports. Non-direct reports in other parts of the organization cannot be viewed.
<b>Performance &gt; Succession Plans &gt; Manage - If this user is a matrix manager</b>	The user has write access to succession plans of employees who's positions
<b>Performance &gt; Succession Plans &gt; Manage - If it belongs to the user's coverage area</b>	The user has write access to succession plans of employees who share the same coverage area.
<b>Performance &gt; Succession Plans &gt; Manage - If it belongs to the user's coverage area or it is associated to a group to which this user belongs</b>	The user has write access to succession plans of employees who share the same coverage area and/or groups.
<b>Performance &gt; Succession Plans &gt; Access administration tools</b>	This permission adds the Succession Plan link to the HR Administration Tools panel and entitles the user to performance administrative tasks in relation to succession plans.
<b>Performance &gt; Succession Plans &gt; Allow nominations</b>	Users require this permission for the Nominate for a position... and Nominate for this position options to be available.
<b>Performance &gt; Goal Plans &gt; View</b>	When no constraint is selected, the user has read-only access to all goal plans, current or not.
<b>Performance &gt; Goal Plans &gt; View - If this user is the owner</b>	The user has read-only access to goal plans for which they are the owner. Typically, the owner will initially be the employee the object was created for.
<b>Performance &gt; Goal Plans &gt; View - If this user is the direct manager</b>	The user has read-only access to goal plans of his direct reports only.
<b>Performance &gt; Goal Plans &gt; View - If this user is a higher level manager</b>	The user has read-only access to goal plans of employees within his organizational chart that are not direct reports. Non-direct reports in other parts of the organization cannot be viewed.

Permission	Description
<b>Performance &gt; Goal Plans &gt; View - If this user is a matrix manager</b>	The user has read-only access to goal plans of employees for whom he is a matrix manager.
<b>Performance &gt; Goal Plans &gt; View - If this user is a mentor</b>	The user has read-only access to goal plans of employees for whom he is a mentor.
<b>Performance &gt; Goal Plans &gt; View - If it belongs to the user's coverage area</b>	The user has read-only access to goal plans of employees who share the same coverage area.
<b>Performance &gt; Goal Plans &gt; View - If it belongs to the user's coverage area or it is associated to a group to which this user belongs</b>	The user has read-only access to goal plans of employees who share the same coverage area and/or groups.
<b>Performance &gt; Goal Plans &gt; Manage</b>	When no constraint is selected, the user has write access to all goal plans, current or not.
<b>Performance &gt; Goal Plans &gt; Manage - If this user is the owner</b>	The user has write access to goal plans for which he is the owner. Typically, the owner will initially be the employee the object was created for.
<b>Performance &gt; Goal Plans &gt; Manage - If this user is the direct manager</b>	The user has write access to goal plans of his direct reports only.
<b>Performance &gt; Goal Plans &gt; Manage - If this user is a higher level manager</b>	The user has write access to goal plans of employees within his organizational chart that are not direct reports. Non-direct reports in other parts of the organization cannot be edited.
<b>Performance &gt; Goal Plans &gt; Manage - If this user is a matrix manager</b>	The user has write access to goal plans of employees for whom he is a matrix manager.
<b>Performance &gt; Goal Plans &gt; Manage - If this user is a mentor</b>	The user has write access to goal plans of employees for whom he is a matrix manager.
<b>Performance &gt; Goal Plans &gt; Manage - If it belongs to the user's coverage area</b>	The user has write access to goal plans of employees who share the same coverage area.
<b>Performance &gt; Goal Plans &gt; Manage - If it belongs to the user's coverage area or it is associated to a group to which this user belongs</b>	The user has write access to goal plans of employees who share the same coverage area and/or groups.
<b>Performance &gt; Goal Plans &gt; Access administration tools</b>	This permission adds the Goal Plan link to the HR Administration Tools panel and entitles the user to perform administrative tasks in relation to goal plans.
<b>Performance &gt; Career Plans &gt; View - If this user is the owner</b>	The user has read-only access to career plans for which he is the owner. Typically, the owner will initially be the employee the object was created for.
<b>Performance &gt; Career Plans &gt; View - If this user is the direct manager</b>	The user has read-only access to career plans of his direct reports only.
<b>Performance &gt; Career Plans &gt; View - If this user is a higher level manager</b>	The user has read-only access to career plans of employees within his organizational chart that are not direct reports. Non-direct reports in other parts of the organization cannot be viewed.
<b>Performance &gt; Career Plans &gt; View - If this user is a matrix manager</b>	The user has read-only access to career plans of employees for whom he is a matrix manager.
<b>Performance &gt; Career Plans &gt; View - If this user is a mentor</b>	The user has read-only access to career plans of employees for whom he is a mentor.
<b>Performance &gt; Career Plans &gt; View - If it belongs to the user's coverage area</b>	The user has read-only access to career plans of employees who share the same coverage area.

Permission	Description
<b>Performance &gt; Career Plans &gt; View - If it belongs to the user's coverage area or it is associated to a group to which this user belongs</b>	The user has read-only access to career plans of employees who share the same coverage area and/or groups.
<b>Performance &gt; Career Plans &gt; Manage - If this user is the owner</b>	The user has write access to career plans for which he is the owner. Typically, the owner will initially be the employee the object was created for.
<b>Performance &gt; Career Plans &gt; Manage - If this user is the direct manager</b>	The user has write access to career plans of his direct reports only.
<b>Performance &gt; Career Plans &gt; Manage - If this user is a higher level manager</b>	The user has write access to career plans of employees within his organizational chart that are not direct reports. Non-direct reports in other parts of the organization cannot be edited.
<b>Performance &gt; Career Plans &gt; Manage - If this user is a matrix manager</b>	
<b>Performance &gt; Career Plans &gt; Manage - If this user is a mentor</b>	The user has write access to career plans of employees for whom he is a mentor.
<b>Performance &gt; Career Plans &gt; Manage - If it belongs to the user's coverage area</b>	The user has write access to career plans of employees who share the same coverage area.
<b>Performance &gt; Career Plans &gt; Manage - If it belongs to the user's coverage area or it is associated to a group to which this user belongs</b>	The user has write access to career plans of employees who share the same coverage area and/or groups.
<b>Performance &gt; Career Plans &gt; Access administration tools</b>	This permission adds the Career Plan link to the HR Administration Tools panel and entitles the user to perform administrative tasks in relation to career plans.
<b>Performance &gt; Development Plans &gt; View - If this user is the owner</b>	The user has read-only access to development plans for which he is the owner. Typically, the owner will initially be the employee the object was created for.
<b>Performance &gt; Development Plans &gt; View - If this user is the direct manager</b>	The user has read-only access to development plans of his direct reports only.
<b>Performance &gt; Development Plans &gt; View - If this user is a higher level manager</b>	The user has read-only access to development plans of employees within his organizational chart that are not direct reports. Non-direct reports in other parts of the organization cannot be viewed.
<b>Performance &gt; Development Plans &gt; View - If this user is a matrix manager</b>	The user has read-only access to development plans of employees for whom he is a matrix manager.
<b>Performance &gt; Development Plans &gt; View - If this user is a mentor</b>	The user has read-only access to development plans of employees for whom he is a mentor.
<b>Performance &gt; Development Plans &gt; View - If it belongs to the user's coverage area</b>	The user has read-only access to development plans of employees who share the same coverage area.
<b>Performance &gt; Development Plans &gt; View - If it belongs to the user's coverage area or it is associated to a group to which this user belongs</b>	The user has read-only access to development plans of employees who share the same coverage area and/or groups.
<b>Performance &gt; Development Plans &gt; Manage - If this user is the owner</b>	The user has write access to development plans for which he is the owner. Typically, the owner will initially be the employee the object was created for.

Permission	Description
<b>Performance &gt; Development Plans &gt; Manage - If this user is the direct manager</b>	The user has write access to development plans of his direct reports.
<b>Performance &gt; Development Plans &gt; Manage - If this user is a higher level manager</b>	The user has write access to development plans of employees within his organizational chart that are not direct reports. Non-direct reports in other parts of the organization cannot be edited.
<b>Performance &gt; Development Plans &gt; Manage - If this user is a matrix manager</b>	The user has write access to development plans of employees for whom he is a matrix manager.
<b>Performance &gt; Development Plans &gt; Manage - If this user is a mentor</b>	The user has write access to development plans of employees for whom he is a mentor.
<b>Performance &gt; Development Plans &gt; Manage - If it belongs to the user's coverage area</b>	The user has write access to development plans of employees who share the same coverage area.
<b>Performance &gt; Development Plans &gt; Manage - If it belongs to the user's coverage area or it is associated to a group to which this user belongs</b>	The user has write access to development plans of employees who share the same coverage area and/or groups.
<b>Performance &gt; Development Plans &gt; Access administration tools</b>	This permission adds the Development Plan link to the HR Administration Tools panel and entitles the user to perform administrative tasks in relation to development plans.
<b>Performance &gt; Employee Metrics &gt; View - If this user is the owner</b>	The user has read-only access to employee metrics if he is the owner. Typically the owner will initially be the employee the object was created for.
<b>Performance &gt; Employee Metrics &gt; View - If this user is the direct manager</b>	The user has read-only access to employee metrics of his direct reports.
<b>Performance &gt; Employee Metrics &gt; View - If this user is a higher level manager</b>	The user has read-only access to employee metrics of employees for whom he is a higher level manager. Non-direct reports in other parts of the organization cannot be viewed.
<b>Performance &gt; Employee Metrics &gt; View - If this user is a matrix manager</b>	The user has read-only access to employee metrics of employees for whom he is a matrix manager.
<b>Performance &gt; Employee Metrics &gt; View - If this user is a mentor</b>	The user has read-only access to employee metrics of employees he is mentoring.
<b>Performance &gt; Employee Metrics &gt; View - If it belongs to the user's coverage area</b>	The user has read-only access to employee metrics of employees who share the same coverage area.
<b>Performance &gt; Employee Metrics &gt; View - If it belongs to the user's coverage area or it is associated to a group to which this user belongs</b>	The user has read-only access to employee metrics of employees who share the same coverage area and/or groups.
<b>Performance &gt; Employee Metrics &gt; Manage - If this user is the owner</b>	The user has write access to employee metrics if he is the owner. Typically the owner will initially be the employee the object was created for.
<b>Performance &gt; Employee Metrics &gt; Manage - If this user is the direct manager</b>	The user has write access to employee metrics of his direct reports.

Permission	Description
<b>Performance &gt; Employee Metrics &gt; Manage - If this user is a higher level manager</b>	The user has write access to employee metrics of employees for whom he is a higher level manager. Non-direct reports in other parts of the organization cannot be edited.
<b>Performance &gt; Employee Metrics &gt; Manage - If this user is a matrix manager</b>	The user has write access to employee metrics of employees for whom he is a matrix manager.
<b>Performance &gt; Employee Metrics &gt; Manage - If this user is a mentor</b>	The user has write access to employee metrics of employees he is mentoring.
<b>Performance &gt; Employee Metrics &gt; Manage - If it belongs to the user's coverage area</b>	The user has write access to employee metrics of employees who share the same coverage area.
<b>Performance &gt; Employee Metrics &gt; Manage - If it belongs to the user's coverage area or it is associated to a group to which this user belongs</b>	The user has write access to employee metrics of employees who share the same coverage area and/or groups.
<b>Performance &gt; Team Management &gt; Access - If this user is the direct manager</b>	This option enables the user to view and action requests displayed on the performance cards of direct reports. The Request Employee and Add Employee options can also be used. If the user has Mentor permissions enabled, the Request Mentoring option will be available.
<b>Performance &gt; Team Management &gt; Access - If this user is a higher level manager</b>	This option enables the user to view and action requests displayed on the performance cards of employees within his organizational chart that are not direct reports. The Request Employee and Add Employee options can also be used. If the user has Mentor permissions enabled, the Request Mentoring option will be available.
<b>Performance &gt; Team Management &gt; Access - If it belongs to the user's coverage area</b>	This option enables the user to view and action requests displayed on the performance cards of employees who share the same coverage area. The Request Employee and Add Employee options can also be used. If the user has Mentor permissions enabled, the Request Mentoring option will be available.
<b>Performance &gt; Team Management &gt; Access - If it belongs to the user's coverage area or it is associated to a group to which this user belongs</b>	This option enables the user to view and action requests displayed on the performance cards of employees who share the same coverage area and/or groups. The Request Employee and Add Employee options can also be used. If the user has Mentor permissions enabled, the Request Mentoring option will be available.
<b>Performance &gt; Team Management &gt; Access administration tools</b>	This option adds a Team Management link to the HR Administration Tools section. This links enable the user to access the Filter Results page.
<b>Performance &gt; Team Management &gt; Access Talent Browser</b>	This option is used to access the Talent Browser on the Navigation bar.
<b>Performance &gt; Team Management &gt; Access Centralized Search</b>	This permission provides access to the talent search box displayed at the top of each screen and advanced search. It also provides access to the central talent search page where results are displayed and advanced searches are run and modified.
<b>Performance &gt; Team Management &gt; Access Reporting</b>	This permission is required to enable Native Reporting. This feature is not generally available in Taleo 12A.
<b>Performance &gt; Team Management &gt; Access Manage Matrix Manager</b>	Required for the Manage Matrix Manager option to be available from the Talent Browser for logged in users.
<b>Performance &gt; Administration &gt; Allow system administration</b>	This option enables the user to access and perform administrative tasks in the Configuration module. Configuration sections relating to Taleo Performance can be accessed, with the exception of SmartOrg. Integration tasks cannot be completed with this level of access.

Permission	Description
<b>Performance &gt; Administration &gt; Access application in maintenance mode</b>	This option gives the user access to the system when it is moved to maintenance mode.
<b>Performance &gt; Employee Profile &gt; View - If this user is the owner</b>	The user has read-only access to the talent profile if he is the owner. Typically the owner will initially be the employee the object was created for.
<b>Performance &gt; Employee Profile &gt; View - If this user is the direct manager</b>	The user has read-only access to the talent profiles of his direct reports.
<b>Performance &gt; Employee Profile &gt; View - If this user is a higher level manager</b>	The user can view the talent profiles of employees within his organizational chart that are not direct reports. Non-direct reports in other parts of the organization cannot be viewed.
<b>Performance &gt; Employee Profile &gt; View - If this user is a matrix manager</b>	The user has read-only access to the talent profiles of employees for whom he is a matrix manager, that is for his delegated employees.
<b>Performance &gt; Employee Profile &gt; View - If this user is a mentor</b>	The user has read-only access to the talent profiles of employees he is mentoring.
<b>Performance &gt; Employee Profile &gt; View - If it belongs to the user's coverage area</b>	The user can view talent profiles of employees who share the same coverage area.
<b>Performance &gt; Employee Profile &gt; View - If it belongs to the user's coverage area or it is associated to a group to which this user belongs</b>	The user can view talent profiles of employees who share the same coverage area and/or groups.
<b>Performance &gt; Employee Profile &gt; Manage - If this user is the owner</b>	The user has write access to the talent profile if he is the owner. Typically the owner will initially be the employee the object was created for.
<b>Performance &gt; Employee Profile &gt; Manage - If this user is the direct manager</b>	The user has write access to the talent profiles of his direct reports.
<b>Performance &gt; Employee Profile &gt; Manage - If this user is a higher level manager</b>	The user has write access to the talent profiles of employees for whom he is a higher level manager. Non-direct reports in other parts of the organization cannot be edited.
<b>Performance &gt; Employee Profile &gt; Manage - If this user is a matrix manager</b>	The user has write access to the talent profiles of employees for whom he is a matrix manager, that is for his delegated employees.
<b>Performance &gt; Employee Profile &gt; Manage - If this user is a mentor</b>	The user has write access to the talent profiles of employees he is mentoring.
<b>Performance &gt; Employee Profile &gt; Manage - If it belongs to the user's coverage area</b>	The user has write access to the talent profiles of employees who share the same coverage area.
<b>Performance &gt; Employee Profile &gt; Manage - If it belongs to the user's coverage area or it is associated to a group to which this user belongs</b>	The user has write access to the talent profiles of employees who share the same coverage area and/or groups.
<b>Performance &gt; Business Goals and Projects &gt; View</b>	<p>This option adds Business Goals and My Projects to the user's navigation inks and enables the user to view those objects. The business goals you can view are dependent on which business organizations you have access to.</p> <p>Note: These settings are not used for Goal Plans.</p>

Permission	Description
<b>Performance &gt; Business Goals and Projects &gt; Manage</b>	This option enables users to create business goals and sub-business goals, as well as projects. Note: These settings are not used for Goal Plans.
<b>Common &gt; Pools &gt; View &gt; If this user is the pool owner or a pool user</b>	The user has read-only access to talent pools he has created or talent pools he has been given access to.
<b>Common &gt; Pools &gt; Manage &gt; If this user is the pool owner or a pool user</b>	The user has write access to talent pools he has created or talent pools he has been given access to.
<b>Common &gt; Pools &gt; Manage &gt; Allow creating and deleting pools</b>	The user has specific create and delete rights for all talent pools.

## Talent Pool User Permissions

User type permissions control the ability to view, create, edit and delete talent pools. Permissions also affect whether user account transfers can be used to transfer talent pool ownership and responsibilities.

The following table provides examples of five user type permission configurations for talent pools and how they impact the user.

**User** – the letter designation (A, B, C, D, E) is used to reference users in the **User Account Transfer** column.

**Selected User Permissions** – permissions example to illustrate the impact on talent pool functionality and user account transfers.

**Talent Pool Feature Access** – description of the functionality the user has access to with the corresponding permissions.

**User Account Transfer** – indicates whether a SmartOrg user account transfer should be initiated between the users.

**Transfer to** means the recipient of the transfer has the required user permissions to access the current user's features.

**Transfer from** indicates the user will retain, at a minimum, the feature access of the transferring user.

User	Selected User Permissions	Talent Pool Feature Access	User Account Transfer
A	View  Manage  Create and Delete pools	<p>These are the most expansive permissions for talent pools. A user with these permissions can complete any talent pool related task and has access to all talent pool features in Taleo Performance.</p> <p>They can create and delete pools, view and edit all pools in the system and change pool ownership to other users.</p>	<p>Transfer to: None</p> <p>Transfer from: All</p>
B	View  Manage	These permissions are similar to A, except that the user cannot create or delete pools. They can view and edit all pools in the system, including changing the ownership.	<p>Transfer to: A</p> <p>Transfer from:</p>

User	Selected User Permissions	Talent Pool Feature Access	User Account Transfer
			D, E
C	<p>View</p> <p>Manage, if this user is the pool owner or pool user.</p> <p>Create and Delete pools that they own only.</p>	<p>These permissions enable the user to view all pools in the system, but the user cannot change pool ownership.</p> <p>Also, if this user is the pool owner or a pool user, they can only edit the Members tab and delete pools that they own.</p>	<p>Transfer to: A</p> <p>Transfer from: D, E</p>
D	<p>View</p> <p>Manage, if this user is the pool owner or pool user.</p>	<p>These permissions enable the user to view and manage only those pools the user is already associated with.</p> <p>This user cannot change the ownership, create, or delete pools.</p>	<p>Transfer to: A, B, C</p> <p>Transfer from: None</p>
E	View	<p>These permissions enable the user to view all of the talent pools in the system only. The user can take no actions on talent pools, even if the user is a member of one of the pools.</p>	<p>Transfer to: A, B, C</p> <p>Transfer from: None</p>

