



# Oracle Taleo Enterprise Edition

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**Using Performance**

**20B**



Oracle Taleo Enterprise Edition  
Using Performance

20B

Part Number: F29953-01

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# Preface

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

## Oracle Applications Guides

To find guides for Oracle Applications, go to the Oracle Help Center at <http://docs.oracle.com/>.

## Documentation Accessibility

For information about Oracle's commitment to accessibility, visit the [Oracle Accessibility Program website](#).

## Comments and Suggestions

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# 1 Getting Started

## Accessing Taleo Performance

### Taleo Performance Login

Three scenarios are supported for logging in to Performance depending on your status: a user with an employee record, a user with an employee record and an HR-Admin role, or an employee with no employee record but with an HR-Admin role.

The status associated with your user name and password determines the scope of the tasks you can perform in Taleo Performance.

- You have an employee record.

If you are a user who has an employee record, the rights associated with your status allow you to access your own information (performance review, succession plan and goal plan). When logging in to the application, you gain access to your profile automatically.

- You have an employee record **and** an HR-Admin role.

By default, you have access to your profile automatically when you log in to the application; however, you can also see other employees' information.

- You have no employee record, but you have an HR-Admin role.

Because you have no employee record, you have access only to other employees' information. Consequently, you have to specify whose information you want to consult. When you log in to the application, the system requests you to enter the appropriate information.

### Logging In With an Employee Record

Logging in to the application as a user who has an employee record enables you to gain access to your information (performance review, succession plan and goal plan).

1. Select Performance from the product list window.
2. If a Legal Agreement window displays, you will need to accept it to be able to continue.

You can also select the Remember my selection option to prevent further display of this agreement on the current computer.

3. From the User Sign In window, enter your user name and password. Click Sign In.
4. Performance opens and displays the Employee Center.

## Logging In With an Employee Record and an HR-Admin Role

Logging in to the application as a user who has an employee record and an HR-Admin role allows you to access your information (performance review, succession plan and goal plan) and the information about other employees in the organization.

1. Select Performance from the product list window.
2. If a Legal Agreement window displays, you will need to accept it to be able to continue.  
You can also select the Remember my selection option to prevent further display of this agreement on the current computer.
3. In the User Sign In window, enter your user name and password. Click Sign In.
4. Performance opens and displays the Employee Center.

## Logging In With No Employee Record But With an HR-Admin Role

When you have no employee record but you have an HR administrator role, you must specify whose file you want to consult.

1. Select Performance from the product list window.
2. If a Legal Agreement window displays, you will need to accept it to be able to continue.  
You can also select the Remember my selection option to prevent further display of this agreement on the current computer.
3. In the User Sign In window, enter your user name and password. Click Sign In.
4. Performance opens.
  - a. If the People Search dialog opens use it to navigate and select the employee whose records you want to work with.
  - b. If the Employee Center opens use the Quick Search or Advanced Search on the upper right corner of the screen to navigate to and select the the employee whose records you want to work with.

The Employee Center displays all the information available on the employee. All actions and security checks, however, are governed by the employee's rights and privileges. At any point, you can switch to another employee's file using the Search box on the upper right corner of the screen.

## Welcome Center

The Welcome Center is a home page that is displayed to users immediately after they log in. It provides a "one-click" access to Oracle Taleo Enterprise Edition products.

The Welcome Center contains an auxiliary navigation bar, a core navigation bar, a Quick Access panel, and a central panel.

- The auxiliary navigation bar contains links to additional resources such as the online help, setup, and the Sign Out link.
- The core navigation bar is a set of tabs that provide direct links to Oracle Taleo Enterprise Edition products. A user might have a tab for any or all of the following products: Performance, Recruiting, Compensation, Oracle Business Intelligence, Learn, and Configuration.
- The Quick Access panel provides an alternative "one-click" access to the same products available in the core navigation bar. It also provides access to modules within products for example, Onboarding (Transitions), Scheduling Center, and to specific content such as a requisitions and candidate files.

- In the central panel, customers can put information of interest to all product users. Alternatively, they can create distinct sets of information and associate an information set with a configuration profile.

If the Welcome Center is enabled, it replaces the table of contents page.

## Taleo Performance Basics

### Taleo Performance Home Page

The Performance main landing page presents a global navigation bar and the Employee Center. Its dashboard-like interface with panels or sections provides information on tasks assigned, network members, and goal progress. Screens within the system can be accessed with one click to add and update data.

The main landing page includes two main components of the Performance system:

1. The top navigation bar, which is present throughout the application, appears above all Performance modules.
2. The Employee Center, which is both a standalone page and the default landing page for Performance, can include Instructions, the My Tasks, My Goals and My Network sections.

Following is a brief overview of the landing page's components.

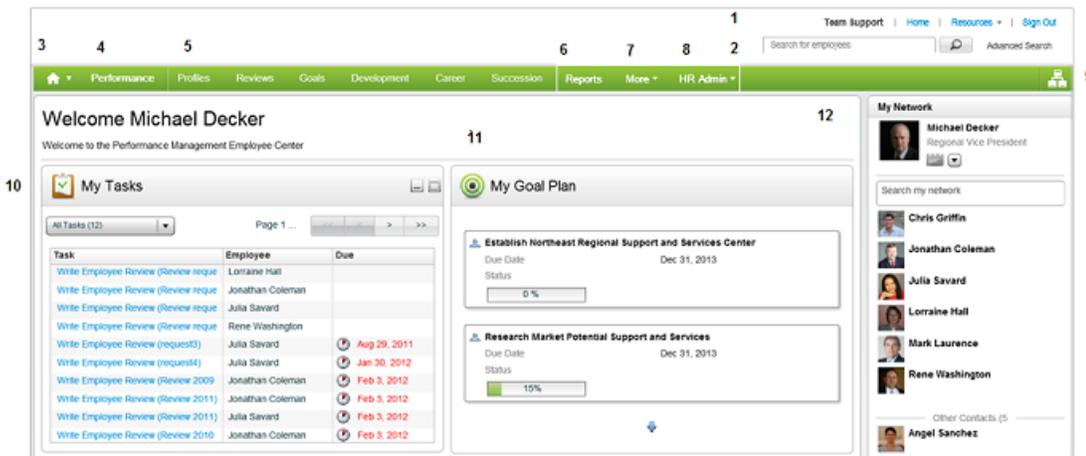


Figure: The Navigation bar displays above all of the Performance modules, including the Employee Center landing page.

Element	Description
1	Auxiliary navigation bar provides access to various information, such as: <ul style="list-style-type: none"> <li>• Login username.</li> <li>• Home link to return to product selection page (e.g. Recruiting, Configuration).</li> <li>• Resources menu with links to user account information, online help and product version.</li> <li>• Sign Out link.</li> </ul>
2	Search For Employees box and Advanced Search link.

Element	Description
3	Home icon to return to product selection page (e.g. Recruiting, Configuration). Aids in cross-product navigation to access other Oracle Taleo Enterprise Edition applications in your organization's implementation.
4	Performance link provides access to return you to the Employee Center landing page from any of the modules in the application.
5	Navigation bar displays fixed at the top of the screen for all Performance modules (e.g. Profiles, Reviews, Goals). Provides links for quick access to the main modules and functions in your organization's implementation, requiring no more that two clicks to get to a module.
6	Reports link opens the My Reports dialog.
7	More dropdown menu provides overflow links to additional modules of Performance (e.g. Team Reviews, Feedback, Mentoring Center).
8	HR Admin dropdown menu provides links to function available to the HR Administrator role (e.g. All Reviews, Review Analytics, Team Management).
9	Talent Browser icon opens the Talent Browser module.
10	My Tasks section provides notification of tasks that have been assigned to you. The task list can be displayed by type, as well as be sorted by employee or due date. Each task entry provides a direct link to the page in the application that corresponds to the task.
11	My Goal Plan section provides a quick view of your goals and their completion status.
12	My Network section provides you with the ability to manage your network, including a pre-populated list of contacts.



**Note:** The applications, modules and features you have access to depends upon your organization's implementation and your access permissions.

## Navigation

Performance provides an easy and intuitive navigation system to eliminate the numerous clicks and navigation steps required in traditional applications. You'll find this is more user-friendly than the traditional menu structure for navigating to information.

Navigation features in Performance include the following: a main navigation bar, object-based navigation menus, smart breadcrumbs, and deep linking.

### Navigation Bar

The Navigation bar provides persistent links to the Welcome Center, the Employee Center main landing page, and the various Performance modules. It displays fixed at the top of the page for all Performance modules (e.g. Profiles, Reviews and Goals), providing a quick way to navigate between modules, and requiring no more than two clicks to get to a module. The Navigation bar includes the following features:

- Home icon - Provides cross-product navigation to access other Oracle Taleo Enterprise Edition applications (e.g. Configuration, Recruiting, Learn) in your organization's implementation.
- Performance link - Returns you to the Employee Center landing page from any of the other modules in the application.

- Main module links - Provides navigation to open the main modules of Performance (e.g. Reviews, Goals, Development, etc.). By default opens the employee's review, goal plan, etc.
- Reports link - Opens the My Reports dialog.
- More dropdown menu - Provides overflow links to additional modules and features in Performance (e.g. Team Reviews, Feedback, Mentoring Center, etc. ).
- HR Admin dropdown menu - Provides links to tools available to the HR Administrator role (e.g. All Reviews, Review Analytics, Team Management).
- Talent Browser button - Opens the Talent Browser module.



**Note:** The applications, modules and features you have access to depends upon your organization's implementation and your access permissions.

### Object-based Navigation Menus

Objects in the system, such as employees or positions, have one-click navigation menus contextualized to reduce the amount of time spent navigating. For example, on the Performance Card you can access a Go To menu that allows you to navigate to various pages about that person. The navigable list includes the Talent Profile, Performance Review, Goal Plan, Career Plan and Job Position Profile. In many data grids one-click navigation allows you to navigate directly to information about a given employee by clicking a menu which expands when you click by the person's name.

### Smart Breadcrumbs

Smart breadcrumbs are located at the top of the application modules and dynamically change as users navigate through the system. The smart breadcrumbs allow you to switch between actions similar to the object-based navigation. Managers can navigate between direct reports with a single click. Smart breadcrumbs also include buttons that return you to the Employee Center landing page.

### Deep Linking

Deep linking provides the ability to use the back and forward buttons of supported web browsers. Pages can also be bookmarked, enabling you to quickly return to popular pages.

## Navigation Bar Links



**Note:** The applications, modules and features you have access to depends upon your organization's implementation and your access permissions.

Navigation Bar Item	Module Accessed
Profile	Talent Profile
Reviews	Performance Reviews
Goals	Goal Plan
Development	Development Plan
Career	Career Plan
Succession	Succession Plan
Reports	My Reports dialog

Navigation Bar Item	Module Accessed
More dropdown	<ul style="list-style-type: none"> <li>• Team Reviews</li> <li>• Assessments</li> <li>• Business Goals</li> <li>• Feedback</li> <li>• Learning</li> <li>• Mentoring Center</li> <li>• Projects</li> <li>• Talent Pools</li> </ul>
HR Administrator dropdown	<ul style="list-style-type: none"> <li>• Review Analytics</li> <li>• All Reviews</li> <li>• All Goals</li> <li>• All Development</li> <li>• All Successions</li> <li>• Team Management</li> </ul>

## Browser History

The browser history links provide the ability to quickly return to a previously viewed page of Performance, by clicking its name in the list of history links or in the list of recently viewed pages.

The browser history feature is available in all Performance modules and provides a detailed name of the page previously viewed, so users can easily identify the page to be displayed.

The link names all start with the application name. The second part of the link name reflects the page title. If the information is specific to a user, the user name will be identified in the link name. In the same way, if the page is related to a specific period or view mode, those will also be part of the link name.

Following are a few examples of browser history links:

Window Name	Browser History Link
Talent Profile	Performance - Talent Profile - <employee name>
Journal	Performance - Journal
Job Position Profile	Performance - Job Position Profile
Job Role Profile	Performance - Job Role Information - <job role name>
Goal Plan (in list mode)	Performance - Goal Plan - <employee name> - <business period> - <tab name> List view
Competency Goal Details	Performance - Competency Goal- <goal name>
Project List (in card mode)	Performance - My Projects - Card view

Window Name	Browser History Link
Performance Review	Performance - Performance Review - <employee name> - <review request> - <review element name> - Compare view
Archived Activities	Performance - Development Plan - Archived Development Activities
Review Analytics	Performance - HR Administration Tools - Review Analytics
Succession Plan (in timeline mode)	Performance - Succession Plan - <job position name> - Timeline view
Talent Pool (in matrix mode)	Performance - Talent Pool - <talent pool name> - <tab name> - Matrix view
Mentoring Center	Performance - Mentoring Center

## Accessing a Previously Viewed Page

1. In the tool bar of your browser window, open the list of recently viewed pages.
2. In the list of all the viewed pages, select the page that you wish to, return to or use the back and forward arrows to go back or forward one page at a time.

The browser displays the page selected.

## Bookmarking a Page

1. Navigate to the page you want to add to your bookmarks (or favorites).
2. Choose the browser option to add a bookmark and choose the desired location.

The selected page will be added to your bookmarks (or favorites) and will allow you to quickly return to that page later one.

## Accessing a Bookmarked Page

1. From your browser window, select the menu option that lists bookmarked (or favorite) pages.
2. Select the Performance page you wish to open.
3. If you are not already signed in, you will be presented with the login page to enter your credentials; otherwise, the desired page will be displayed. The selected page will open, directly if you are already signed in, or after having entered your credentials in the login page if you were not already signed in.

The selected bookmarked page is displayed.

## Deep Linking

Deep linking provides the ability to use the back and forward buttons of supported web browsers, enabling you to quickly return to previously viewed pages.

Using the back and forward buttons of the browser means the internet browser behavior you expect to see is available when using Performance. This feature works at the higher module level, where different URLs are available, but does not differentiate between items within the module.

The following table lists features of Performance that support deep linking.

Deep Linking Support Levels			
Page	Module	Component	Support Level
Navigation bar - HR Admin	Review Analytics	Review Cycle Analytics	Full Support
		Review Request Analytics by Rating	Full Support
		Review Request Analytics by Status	Full Support
	All Reviews	Performance Review	Partial Support*
	All Succession Plan	Succession Planning	Partial Support*
	All Goal Plans	Goal Plans	Partial Support*
	Team Management	Team Management	Full Support
	All Development Plans	Development Plan	Partial Support*
Navigation bar - main modules	Profiles	General	Full Support
	Career	Career	Full Support
		Job Role Profile	Full Support
		Job Role Details	No Support
		Search for Development Activities	No Support
		Create an Activity	No Support
	Development	Development	Full Support
		Activity Details	Full Support
		Recommendations	Full Support
		Archived Development Activities	Full Support
	Reviews	Review	Full Support
		Tabs	No Support**
	Goals	List Mode	Full Support
		Time Line Mode	No Support
		Details Perspective	Full Support
		Living on the List Buttons	No Support
		General	Full Support
	Succession	List Mode	Full Support
		Compare	Full Support
		Time Line	No Support
	Matrix	No Support	

Deep Linking Support Levels			
Page	Module	Component	Support Level
Employee Center	My Tasks	General	Full Support
	My Goals	General	Full Support
	My Network	Network Contact List	Full Support
Common View	Pop-up Windows		No Support
	Performance Card		Full Support
Context Box	Home Button		Full Support
	People Selector		Full Support
	Module Selector		Full Support

\* Employee links are not supported.

\*\* Tabs are not supported, as they are contained within the page and cannot be separately linked.

## Auxiliary Navigation Bar

The auxiliary navigation bar, located at the top right of pages, provides users with quick access to a collection of resources that they typically want to consult on occasion; resources not associated with a specific Oracle Taleo Enterprise Edition product.

When enabled, the auxiliary navigation bar is available at all times for users to see and access.

The auxiliary navigation bar may contain the following elements (if enabled and if users were granted access to them):

Element	Description
Home	<ul style="list-style-type: none"> <li>If you have access to multiple Oracle Taleo Enterprise Edition products and you click Home, the Welcome Center is displayed.</li> <li>If you have access to Recruiting only and you click Home, the Recruiting Center front page is displayed.</li> <li>If you have access to Legacy Onboarding only and you click Home, the Legacy Onboarding WebTop front page is displayed.</li> <li>If you have access to Onboarding (Transitions) only and you click Home, the Onboarding (Transitions) Center front page is displayed.</li> <li>If you have access to Performance only and you click Home, the Employee Center front page is displayed.</li> <li>If you have access to Compensation only and you click Home, the Compensation Center (Rewards Planning) front page is displayed.</li> <li>If you have access to Configuration only and you click Home, the Configuration Center front page is displayed.</li> </ul>
Resources	<p>May include:</p> <ul style="list-style-type: none"> <li>My Setup: Access to personal preferences.</li> <li>Training: Access to online training materials.</li> </ul>

Element	Description
	<ul style="list-style-type: none"> <li>e-Learning: Access to eLearning materials.</li> <li>Support: Access to Oracle Support.</li> <li>Help: Access to online help.</li> <li>About: Information about the product such as the version number and the build number that you need to provide to Oracle Support when you need to contact them.</li> </ul>
Talent Grid	Access to Solution Exchange and Knowledge Exchange. Oracle Taleo Enterprise Edition clients who use only Performance have access to Knowledge Exchange only.
Sign Out	Terminates the session and you are automatically signed out of all Oracle Taleo Enterprise Edition products.

## Configuration

The display of the auxiliary navigation bar is enabled by the following setting.

Setting	Possible Values	Default Value	Location
Auxiliary Navigation Bar	<ul style="list-style-type: none"> <li>No</li> <li>Yes</li> </ul>	Yes	Configuration > [SmartOrg] Administration > Configuration Profile

Elements displayed in the auxiliary navigation bar depend on settings that were enabled and on permissions users were granted.

The following permissions are required to access the Talent Grid products:

User Type Permission	Location
Access Knowledge Exchange	Configuration > [SmartOrg] Administration > User Types > Grid > Knowledge Exchange
Access Solution Exchange	Configuration > [SmartOrg] Administration > User Types > Grid > Solution Exchange

## Help Center

The Help Center provides the standard online help for Performance. Access it from the Navigation toolbar at the top each page of the application. Click the Resources link and then select the Help Center option. The Help Center opens in a new window; providing a help content viewer with search, navigation and topic display capabilities. The Help Center feature is delivered enabled at implementation. There is no configuration required.

The Help Center topic content is the same as that delivered in the PDF versions of the User and Administration guides, the main difference being the Help Center content is accessible from within the application.

Links to specific sections of the Help Center can be configured using the Customizable Online Help feature to display in the Supporting Tools pane of most Performance modules, providing a more contextual deployment of the standard content. This option is not available if you choose to use the Customizable Online Help feature to deploy your organization's own custom help content. For more information see [Customizable Online Help](#) and [Supporting Tools](#).

## Supporting Tools

The Supporting Tools feature displays as a pane on the right side of most modules of the Performance Application. It provides users quick access to Feedback, Fit Analysis or Attachments tools appropriate to the module or context. The Supporting Tools pane can also be configured to display customizable online help; either your organization's own custom help content, or selected sections of the delivered, standard online help.

Configuration of the default state of the Supporting Tools window (expanded or collapsed) is determined using the setting **Supporting Tools Displayed by Default** (in Configuration under the Global Settings category.) The setting controls the Supporting Tools window in all modules of Performance in which the window appears. When set to Yes the setting makes the Supporting Tools window open (or expanded) by default. When set to No the window is collapsed by default. No is the initial default value for this setting when the application is first opened. In either case the window also has an expand/collapse button that allows you to open or close the window as needed.

For more information see [Customizable Online Help](#) and refer to the **Oracle Taleo Enterprise Edition Administration Guide for Performance** for configuration instructions.

## Customizable Online Help

The Customizable Online Help feature provides your organization the ability to present contextual, customizable online help to your users. Configuration settings allow you to contextualize the presentation of online help at the Performance module level (reviews, goals, feedback, etc.). For each module you'll have the ability to display your organization's own custom content. Users will access it through the right side Supporting Tools pane which displays for each module. With this feature you can make available to your users, from within the application, your organization's relevant help content; such as internal policies and procedures, forms, and help videos.

### Customizable Online Help Versus Standard Online Help.

**Customizable Online Help** - Is created by your organization, with your own content on your website or server. You can configure your URLs into Performance to display content in the right side Supporting Tools pane.



**Note:** It is the customer's responsibility to ensure their custom help is accessible to end-users if it is hosted on a server with restricted access.

**Standard Online Help** - Is the default Oracle Taleo Standard Online Help content, which can be displayed from the Supporting Tools pane. It can be contextual in the sense the content provided can be at the level in the documentation relevant to the application module.



**Note:** This is the same content as delivered in the main Help Center, the complete contents of which are accessible via the Resources link on the navigation toolbar at the top right of each page.

For more information see [Help Center](#).

### Display of Help in the Right Side Supporting Tools

When activated in configuration, the right side Supporting Tools pane displays in the application module using a collapsible/expandable style.

- When the pane is collapsed the Help button always displays below the Show Tools button, if both are enabled.
- When the pane is expanded the Show Tools and Help display as tabbed frames, if both are enabled.

Here are some tips about the sizing of the custom help display window:

- The internal size of the HTML frame is adaptive to the window height and fixed in width to 177 pixels.
- Some websites use code that prevents them from being embedded within another frame.
- There are methods for creating web pages your organization can use to have your hyperlinks launch popup windows. These may present a better way to organize help content for display, such as having a main page of help topic links leading to separate popup pages for each help topic.

For more information see *Supporting Tools*.

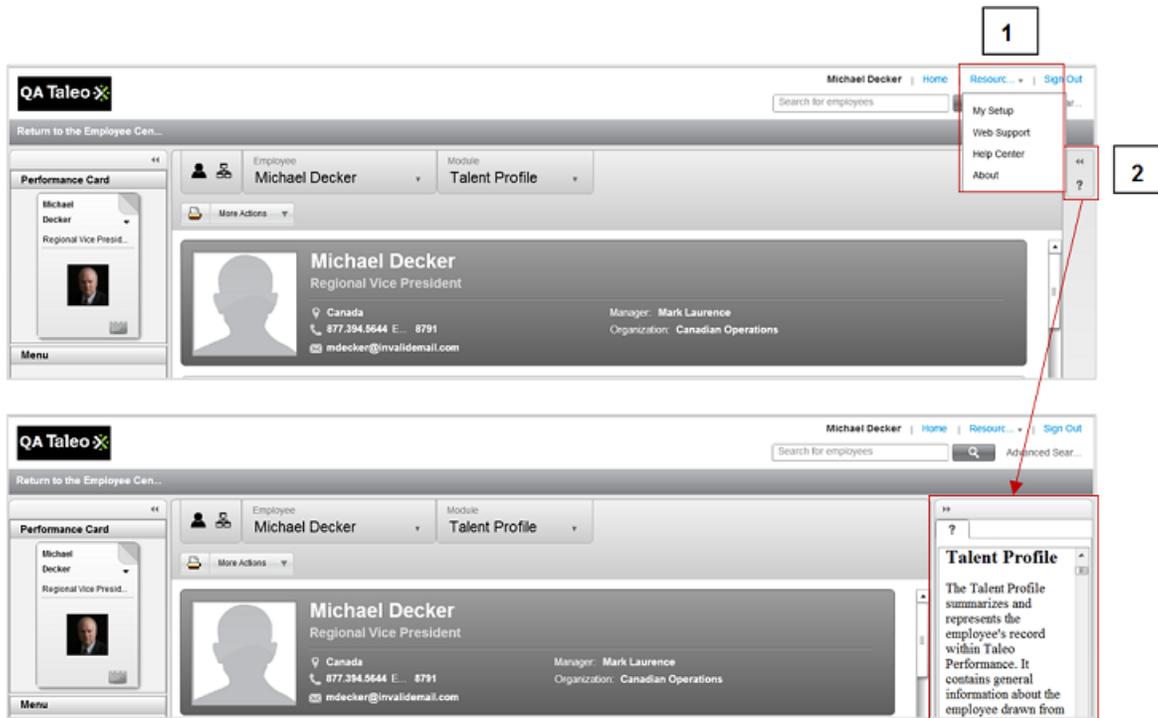


Figure: Michael Decker's Talent Profile page with links to online help in the upper right toolbar and right side supporting tools.

With respect to the figure immediately above:

1. To access the entire Standard Online Help click **Resources > Help Center**.
2. To access the customizable/contextual Help click the **Help** button or tab in the right side Supporting Tools pane.

### Configuring the Customizable Help Display

For each Performance system module there are a pair of corresponding configuration settings: Activation and URL. With these settings, the right side Supporting Tools pane for each module can be configured to one of three display options:

1. **No Help Display** - Use the Activation setting for a module to activate the display of the Help tab in the Supporting Tools pane. The default setting is No (false or deactivated).
2. **Customizable Online Help** - Use the URL setting to display your organization's customized online help, by entering the URL path of the website where your content is stored into the applicable value field. Do this for each implemented language. This should be the path to the location where your policies, procedures, articles, video clips, etc. are accessible.

3. **Standard Online Help as a default** - Use the URL setting to display the default Standard Online Help, by copying the default URL for each implemented module and language (from a list provided at the bottom of the configuration page), and pasting it into the applicable Value field.

Customizable Online Help configuration settings are located at **Configuration [Performance] Settings [Product Settings] [Refine by] Category=Help**. For more information refer to the **Performance Administration Guide** for configuration instructions.

The following is an example of how the Customizable Online Help feature can benefit an organization:

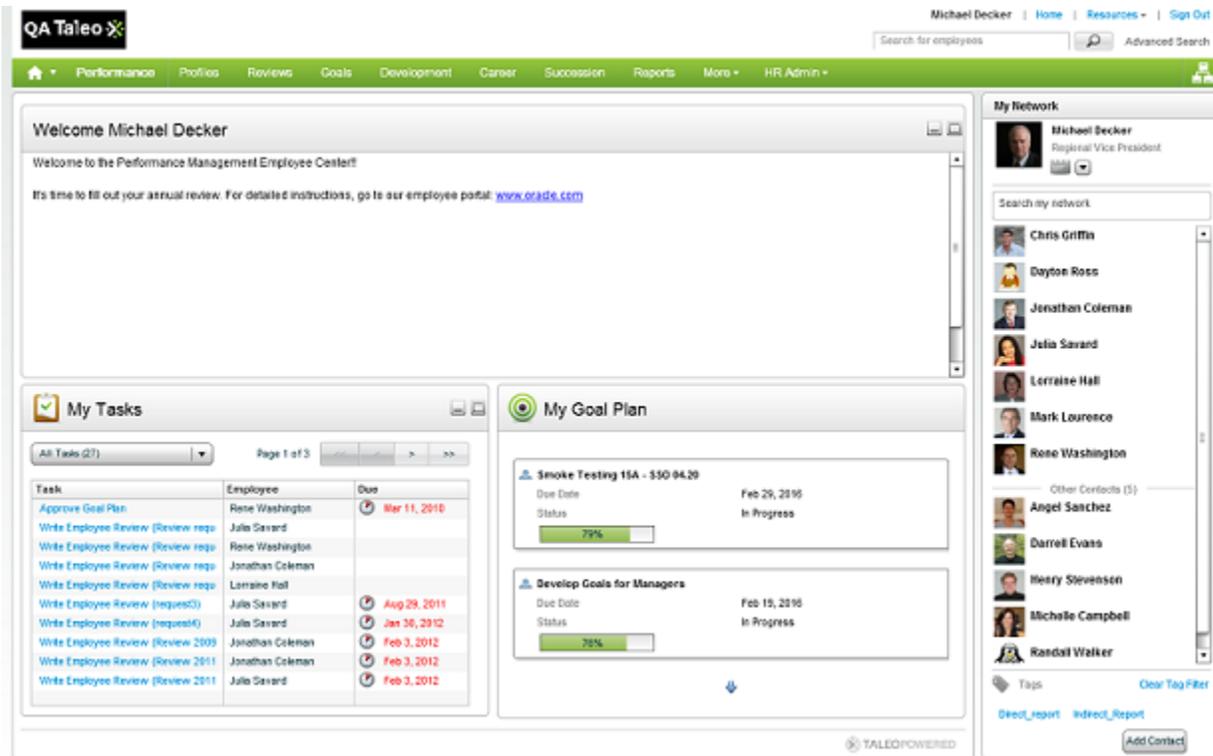
1. The administrator of an organization has an internal website with URL links to help documentation their organization has created for modules of the Performance application (Reviews, Talent Profile, Succession, etc.).
2. The internal website also contains translations of this custom help content for all the languages they've enable in the Performance application, and the website is organized so content for each module and language combination is presented on separate HTML pages.
3. Since the content is organized by module and by language, and the URL's to the website can be used to access the content via a popup window, the administrator configures the Performance application to display the URL links to the HTML pages, by module and by language.
4. The organization's users now have access to its custom help content in the Supporting Tools pane, contextually relevant to each configured module and language.

## Employee Center

The Employee Center is the landing page of the application. It presents a series of panes or sections that provide information relevant to the employee. In combination with the top Navigation bar they comprise the Performance Home page.

The Employee Center has a configurable dashboard-like interface with up to four sections, providing information on general information, tasks assigned, goal progress and network contacts. Each of the sections in the Employee Center are designed as widgets that can be enabled and disabled by Administrators to customize the layout and look of each customer's landing page. The system dynamically optimizes the real estate of the full page by expanding the widgets that are selected. Screens within the system can be accessed with one click to add and update data. The four sections of the Employee Center are:

- Instructions
- My Tasks
- My Goal Plan
- My Network



For information on how to enable and disable Employee Center widgets, see the Oracle Taleo Enterprise Edition Administration Guide for Performance for Feature Pack 15A onward.

## Instructions

The Instructions widget provides a rich text editor that Administrators can use to easily enter special announcements, instructions, links to internal portals, graphics or other custom employee resources. There is one Instruction widget per zone; this is not customizable by OLF.

## My Tasks

My Tasks provides the employee notification of tasks that have been assigned to them. The list of assigned tasks can be viewed based on task types, employee and those tasks that are past due. Each task provides a link to directly access the related task.

Within My Tasks, the grid view is a collapsible/expandable window:

- The All Tasks dropdown list displays (and group counts the total number of) the Task Types and Task Names contained therein.
- The default view displays up to ten rows (tasks) with the following columns: Task name, Employee name and Due date.
- Collapse the task grid to hide the information in My Tasks.
- Maximize the grid to display up to 30 rows (tasks) with additional columns (Period/Cycle and Assigned).
- Hyperlinked tasks in either the default or maximized view provide quick access to open the modules and records requiring action.
- There is pagination if more tasks appear on the list than can fit on the available space.

- The task list is sortable based on the column headers. By default the list shows tasks in the order received, newest on top. Sorting is one page at a time, so you should go to the maximized view if you need sorting capability because more rows appear in that view.

## My Goal Plan

My Goal Plans provides a quick view of the employee's goals and their completion status. The section displays goal plans assigned to the logged-in user. It fits into the right hand section of a two-section area. Each goal plan displays a progress bar with a number showing the percent completed and a due date.

## My Network

My Network provides the mechanism to manage the employee's network. It fits into the far right-hand section of the page. From top to bottom it displays the following features:

- The Employee Card, including a dropdown menu containing general access to other modules for the employee, and the Snapshot Card.
- The Search My Network feature, allowing you to filter the list contacts currently shown. If the My Network widget is disabled, *Search My Network* in the People Selector is also disabled.
- A prepopulated list of your contacts. If you are a manager, you get: your manager, your peers, and your first-level direct reports. If you are an employee, you get: your manager and your peers. They are ordered in ascending alphabetical order, although the prepopulated list is sorted separately from the Other Contacts list. The prepopulated list is limited to the first 200 contacts in your network.
- A list of Other Contacts that you have added to your network (using the Add Contact button).
- Tags for filtering. These are not prepopulated tags. All tags are configured by the user, and users can create any tags they want. Tags can only be applied to Other contacts.



**Note:** A person can only appear in one of the contact lists. Their image, if any is available, displays to the left of their name.

## Viewing Assigned Tasks

Viewing assigned tasks from the My Tasks panel allows you to see all the tasks that have been assigned to you and that are not yet complete. You can filter the tasks by category or by those that are overdue.

### Performance > [Employee Center] > My Tasks

1. In the **My Tasks** section, navigate to the desired task from the list.  
Use the All Tasks dropdown, or the page buttons, or sort on the column headers to reduce the list and help you identify the desired task.
2. Click on the desired task.
3. The system opens the module and record needed to fulfill the task.  
If you do not have the required user permissions to complete the task a message is displayed.

## Networking

Networking is a critical component of Performance. It provides the ability for users to share data with people in their network for the purpose of gathering feedback and providing input that may impact their performance ratings. My Network is a section on the Employee Center that shows the list of individuals in the employee's current network.

Networking provides the ability for users to share data with people in their network for the purpose of gathering feedback or for rating performance on specific items. Users can select others to be included in their network. For the purpose of performance reviews, managers will need to approve which network members are allowed to provide feedback.

From the My Network section, a user can request feedback from one of their network members or they can choose to send unsolicited feedback to the employee.

Users established in My Network are leveraged when requesting feedback in each of the products. For example, when developing succession plans, a manager can request a member of his network to provide feedback on the plan or on specific members of the plan.

Network members can also be associated with tags that help identify them. A given network member can be associated with multiple tags. A list of tags allows the user to then quickly filter the members of their network by clicking on a single tag.

## Adding Network Contacts

**Performance > [Employee Center] > [My Network]**

1. In the My Network section click Add Contact to display the People Selector.
2. Select **In my direct reports** to find contacts by drilling down through your direct reports or **By keywords** to search based on name, email and job title.
3. Select the available employees name and click **Select**.
4. Enter a message for the contact and click Done.

A network invitation is sent to the recipient.

The employee reviews the invitation and if they accept the invitation, the sender is added to the recipient's network list. Regardless of whether they accept, you can still send feedback about the person.

## Feedback

The Feedback module offers employees and managers the ability to ask colleagues to provide input and insight about an employee. For example, an employee can request feedback on a goal plan or individual goals and then share that feedback with his or her manager during the performance review process. A manager can request feedback on an employee from co-workers or other managers that have interacted with the employee.

Through feedback, Performance offers users the tools to provide information about an activity (such as a goal or review). It provides the flow of information back to an employee so that actual performance can be compared with planned performance. It works alongside networking to provide employees with the ability to create, maintain and leverage social networks for mentoring, coaching and learning.

## Feedback Terminology

The following terms have specific, standardized meaning in relation to the Feedback module. They provide a foundation of consistent terminology for understanding and using Feedback Management.

Term	Description
Approver	The person who is requested to approve feedback (could be the same as Employee, Provider or Requester).
Context	The feedback subject, or type, indicating the focus of the feedback provided or asked for (e.g. Career Scenario, Competency, Development Activity, Employee Goal, General, Job Role).
Employee	The person who is the subject of the feedback, generally the person selected in the breadcrumbs at the top of the Feedback module page.
Provider	The person providing feedback (who could be the same as the Employee).
Recipient	The person who receives the feedback. If feedback is requested, the recipient is the same as the requester. Otherwise the recipient may be same as the provider, employee or direct manager.
Requester	The person requesting feedback (who could be the same as the Employee or Provider).

## Feedback Tools

Generally, the feedback tools provided in Performance fall into two categories:

1. The Feedback module functions distributed globally throughout the application. These are discussed in this section of the documentation.
2. The Feedback page providing a consolidated view of a person's feedback. This is discussed in the two following sections of the documentation: *Feedback Page* and *Results List*.

The Feedback module is accessed from many other modules in Performance, for the purpose of providing feedback to an employee. All feedback is entered in the system and stored in the Feedback module. Feedback that is given to the manager is kept private from the employee.

## Employee Center Quick Link

On the Employee Center, the **Feedback** quick link on the left side pane replaces the *Feedback Journal* link available in previous releases.

## Go To Dropdown List

The Go To dropdown list provides the user an option to open the Feedback page from these locations in the application:

- Performance Card
- Performance Reviews > Individual Employee
- Search Results > Individual Employee
- Succession Plan > Successor Name
- Succession Plan Nomination Slate > Individual Employee
- Talent Browser Talent Car
- Talent Pools > Person Name
- Talent Snapshot

## Feedback from the Supporting Tools

Users can request feedback through the Supporting Tools pane on the right of the application. The Feedback supporting tool is associated with these modules of Performance:

- Development Plan
- Performance Review
- Goal Plan
- Succession Plan

The configuration setting for the default state of the Supporting Tools window (expanded or collapsed) is determined using the setting named **Supporting Tools Displayed by Default**. It appears in Configuration > Global Settings. The setting controls the Supporting Tools window in all sections of Performance in which the window appears.

When set to Yes the setting makes the Supporting Tools window open (or expanded) by default. When set to No the window is collapsed by default. No is the initial default value for this setting when the application is first opened. In either case the window also has an expand/collapse button that allows you to open or close the window as needed.

### Feedback from the Oracle Taleo Inbox

From the Microsoft Outlook Inbox tool, users can request and capture feedback and supporting documents without logging into the application, when Oracle Taleo Inbox is also installed. That means most of the review content is already assembled at review time. Instead of writing the review, managers organize, compare, and synthesize the information.

### Feedback from the Task List

Once users receive a feedback request, an entry is added to their Employee Center's task list. Then, if they want to provide feedback, they just open the task and they will be taken to the feedback reply screen. The feedback response form for goal, succession and career plans has been enhanced to provide additional and contextual details about the employee for whom feedback is requested to help the respondent to provide information. The feedback provider can also provide a rating for a goal.

### Provide Feedback Dialog

In the Provide Feedback dialog the Feedback text entry box provides a maximum of 6,000 characters to accommodate more detailed and meaningful feedback. The entry area also has a character counter which dynamically displays, as you type, how many characters you have left or how many you are over the limit. The system allows you to continue typing once the 6,000 character limit is reached, but prevents you from sending the feedback when the number of characters is over the limit.

### Ask for Feedback Dialog

When you use the Ask for Feedback button to request feedback about yourself or someone else, the system opens a dialog box allowing you to choose the person to request feedback from. The dialog also allows you to choose the **Context** of feedback requested (i.e. General, Career Scenario, Competency Goal, Development Activity, Employee Goal or Review). Depending upon the Context selected the dialog also allows you to specify whether the feedback is requested on all elements of the context or just specific ones. For example, you can ask for feedback for an entire career scenario or a specific career option within the scenario. Feedback requests do not expire. A feedback request cannot be canceled, but it can be rejected or deleted.

### Feedback - Available Actions from Other Contexts

Feedback can be read, requested or provided from various locations in the application that is within specific contexts. The following table lists additional contexts where feedback actions are available:

Module	Available Actions	Related message template for email notification
My Tasks	Reply to a feedback request.	No email notification available
My Network	Send general feedback to the employee who's card is selected.	No email notification available
	Send general feedback to the manager of the employee who's card is selected.	No email notification available
Feedback	View received and sent feedback, and depending on configuration, also feedback about logged user.	Email notification not applicable for viewing
	Provide general feedback about an employee, using a text entry area allowing up to 6,000 characters.	No email notification available
	Request general or specific feedback about an employee or yourself, selecting the context and/or options within a context for feedback.	<ul style="list-style-type: none"> <li>Standard notification for a feedback request.</li> <li>Standard notification for a response to a feedback request.</li> </ul>
	View pending feedback requests.	Email notification not applicable for viewing
	Send Reminder for pending feedback requests.	Email notification sent as well as new task in Task List.
	Print Feedback entries currently displayed in the Feedback page in a PDF format report.	Email notification not applicable for printing the report
Talent Browser	Send general feedback to the employee who's card is selected.	No email notification available
	Send general feedback to the manager of the employee who's card is selected.	No email notification available
Career Plan	View general about the logged user and career plan feedback provided about the logged user's career plan.	Email notification not applicable for viewing
	Request feedback about a career scenario or a specific career option.	<ul style="list-style-type: none"> <li>Standard notification for career plan feedback request</li> <li>Standard notification for career plan feedback response</li> </ul>
Development Plan	View general feedback about the logged user and feedback provided about development activities in the logged user's development plan.	Email notification not applicable for viewing
	Request feedback about a development activity in the logged user's development plan.	<ul style="list-style-type: none"> <li>Standard notification for development plan feedback request</li> <li>Standard notification for development plan feedback response</li> </ul>
Goal Plan	View general feedback provided about the logged user and feedback provided about the goals or competencies in the goal plan of the logged user.	Email notification not applicable for viewing

Module	Available Actions	Related message template for email notification
	Request feedback about the goals or competencies in the goal plan of the logged user.	<ul style="list-style-type: none"> <li>Standard notification for employee goal feedback request</li> <li>Standard notification for employee goal feedback response</li> </ul>
Performance Review	View general feedback provided about the logged user and feedback provided about the items in the performance review of the logged user.	Email notification not applicable for viewing
	Request feedback about items in the performance review of the logged user.	<ul style="list-style-type: none"> <li>Standard notification for review feedback request</li> <li>Standard notification for review feedback response</li> </ul>
Succession Plan	Request feedback provided about the succession plan or about individual successors within the plan for the position of the logged user.	<ul style="list-style-type: none"> <li>Standard notification for succession plan feedback request</li> <li>Standard notification for succession plan feedback response</li> </ul>
Mentoring Center	Send feedback to mentee (protege).	

## Feedback Page

The **Feedback** page is the central location where a user has a consolidated view of all feedback items received or provided, whether completed or pending. They can filter feedback items to be viewed by date range, provider and context. A user can also ask for general or specific feedback about themselves or another user, and provide general feedback about another user.

### Breadcrumbs Navigation

The breadcrumbs navigation model is implemented on the Feedback page to standardize selection of the subject employee and navigation with other modules.

Breadcrumbs navigation is provided at the top of the Feedback page consistent with other Performance modules. The breadcrumbs display the current employee in effect. They provide you the ability to change the employee based on your security permissions and access. The Employee selected in the breadcrumbs determines the person who is the subject of, or involved in, the feedback items displayed in the Feedback module. The breadcrumbs also display the module you are currently working in (e.g. Feedback), and provides a selector allowing you to navigate to other modules in the system.

Employees only have access to feedback about themselves and all the feedback they provided. Managers have access to feedback about themselves and their direct reports. Feedback is not necessarily shown for everyone in your coverage area. The content displayed in the Feedback page's Results List also depends on the following:

1. The configuration of the "Enable Public Access to Feedback" setting (i.e. Private or Public).
2. Primary filter settings selected in the left hand panel; by date range, Provider or Context.
3. The tab view selected: Received or Provided.
4. The secondary filter button selected for the tab view: Completed, Pending or Total.

### Performance Card

The top left side panel includes the Performance Card. The standard Performance Card is provided, consistent with the look and feel of other Performance modules. The content of the card is contextualized to reflect the employee selected in the breadcrumbs. A link to the Feedback module is added to the Performance Card, in all the modules the card is displayed.

### Feedback Primary Filters

Primary filters are provided in the left side lower Filters pane. Filters are provided to set the parameters for data displayed in the Feedback module. Available filters are:

- Date Range
- Provider
- Context (Performance module or feature)



**Note:** Date range always defaults to one prior to the current date; populates feedback items received and sent within the specified range; and also populates pending feedback requests with the due date within the specified range.

The filters apply only to the selected view or tab on the Results List, meaning they apply separately to the feedback received or provided views. The following table describes the functions of the filters:

Filter	Filter Option	Description
Date Received/Sent From		This filter is used to see feedback starting at this date. By default, the date that corresponds to one year before the current date is entered.
Date Received/Sent To		This filter is used to see feedback ending at this date. By default, the current date is entered.
Provider		This filter is used to see feedback provided by a specific person. If you are viewing <b>Received</b> feedback, the Provider field defaults to blank, meaning feedback from all providers is displayed. Otherwise, you may narrow down the list by selecting a provider. If you are viewing <b>Provided</b> feedback, the Provider field is auto-populated with your name.
Context		This filter is used to see feedback in relation to a specific context, which is selected from a dropdown list. The possible contexts are: Career Scenario, Competency, Competency Goal, Custom Item (in review), Development Activity, Employee Goal, General, Job Role and Review.
Context	<i>Career Scenario</i>	To see feedback provided in response to feedback requests sent from career plans, in relation to career scenarios.
Context	<i>Job Role</i>	To see feedback provided in response to feedback requests sent from career plans, in relation to specific job roles in career scenarios.

Filter	Filter Option	Description
Context	<i>General</i>	To see general feedback provided about employees, whether feedback was requested/provided from the Feedback page, My Network or a Performance Card in the Talent Browser.
Context	<i>Development Activity</i>	To see feedback provided in response to feedback requests sent from development plans, in relation to development activities.
Context	<i>Employee Goal</i>	To see feedback provided in response to feedback requests sent from performance reviews or from goal plans (Goals tab) in relation to employee goals.
Context	<i>Competency Goal</i>	To see feedback provided in response to feedback requests sent from goal plans (Competencies tab) in relation to competency goals.
Context	<i>Competency</i>	To see feedback provided in response to feedback requests sent from performance reviews in relation to competencies that are part of reviews , but not drawn from goal plans. When the competencies are imported in reviews from goal plans, they are referred to as 'competency goals'.
Context	<i>Review</i>	To see feedback provided in response to feedback requests sent from performance reviews.
Context	<i>Custom Item</i>	To see feedback provided in response to feedback requests sent from performance reviews about items that are customer specific.

### Provide Feedback Toolbar Button

In the toolbar at the top left of the Feedback page, just below the breadcrumbs, the Provide Feedback button gives users the ability to send general feedback to other persons. When you click the Provide Feedback button the system first opens the People Selector dialog for you to choose the person(s) you want to provide feedback for. Once you select a person the Provide Feedback dialog opens. The Feedback text entry box allows for maximum of 6,000 characters to accommodate detailed and meaningful feedback. The entry area also has a character counter which dynamically displays, as you type, how many characters you have left or how many characters you are over the limit. Although the system allows you to continue typing once the 6,000 character limit is reached, a warning message displays if you try to send feedback that exceeds the limit. When you close the warning dialog your comments are still saved in the session and you can edit down the feedback until the count is under the limit. The system prevents you from sending the comments until the number of characters is reduced below the limit. When providing feedback, you also have the choice to send the feedback to another person for approval of the feedback.

### Ask for Feedback Toolbar Button

Also in the toolbar at the top left of the Feedback page, the Ask for Feedback button provides users the ability to request general or specific feedback about themselves or another person. When you click the button the Ask for Feedback dialog opens. If you are the employee in the breadcrumbs navigation, then the dialog recognizes the request is for about yourself. If you want to ask for feedback about another person, use the breadcrumbs (Employee dropdown selector) to choose the person. The Ask for Feedback dialog also allows you to choose the person you want to ask to provide the requested feedback. The dialog allows you to specify the **Context** of feedback requested: General, Career Scenario, Competency Goal, Development Activity, Employee Goal or Review. Depending on the context selected the dialog displays an additional section allowing you to specify whether feedback is requested on all elements of the context or

just specific ones. For example, you can request feedback for an entire career scenario or specific career options within the scenario.

## Feedback Results List

The Feedback page's Results List is the central location where a user has a consolidated view of all feedback items received or provided, whether completed or pending. The feedback items you can view depends upon your permissions. The list presents feedback items in a grid having rows and columns, with a separate row for each feedback item. Columns are fields summarizing details about the feedback items. The grid provides immediate access to all feedback an employee has received about themselves and provided about other people, see what's pending and send reminders.

Feedback items presented in the Results List are subject to filtering by the following:

1. The configuration of the "Enable Public Access to Feedback" setting (i.e. Private or Public).
2. The employee selected in the breadcrumbs at the top of the page is the subject of the feedback.
3. The Date Range, Provider and Context filters in the left side Filters pane.
4. The Feedback view or tab selected (Requested or Provided).
5. The contextual or secondary filter button selected at the upper right of the Results list.

### Received and Provided Tabs for Feedback Views

When you access the Feedback page, and the employee selected in the breadcrumbs is yourself, two default views are displayed for the Results List (Received and Provided). They are controlled by tabs with the same name at the top of the Results List. The tabs provide the ability to present feedback items in two separate views (Received and Provided), contextualizing the items displayed in the module. Both views display feedback items for My Feedback.

- **Received** - Displays received feedback received about yourself, solicited or unsolicited ; pending requests for feedback about yourself (requested by yourself or someone else); and requests for feedback about yourself (requested by yourself or someone else) that are pending approval.
- **Provided** - Displays all solicited and unsolicited feedback where you are the author: provided by yourself ; pending requests for feedback you were asked to provide; and feedback you provided that are pending approval.



**Note:** When the employee selected in the breadcrumbs is another employee (not yourself), the view in the Results list is for feedback items received about the other employee. No tabs are displayed at the top of the Results List.

### Feedback Module Columns Based on Views

Fields (columns) displayed in the Results List are organized to put the focus on the employee selected in the breadcrumbs. The following fields (columns) are displayed in the list based on the view selected.

Tab (View)	Fields (Columns)
Received	Context, Provider, Rating, Feedback, Date, Status and Importance flag.
Provided	Employee, Context, Requester, Rating, Feedback, Date and Status.



**Note:** The list can be sorted by any column, except the Feedback and Status columns, in ascending or descending order.

## Contextual Secondary Filter Buttons

A group of three buttons (Completed, Pending and Total) are provided at the top right of the Feedback Results List. The buttons are visible in each of the two main views for the Results List (Received and Provided). They show counts of the number of lines in the journal for each of those categories. When clicked they serve as contextual or secondary filters within the selected view, displaying a subset or all of the line items in the view. The result set displayed in the list is reduced to line items meeting both the view criteria and the secondary filtering criteria of the chosen button. For example, if the view is set to Received, and you click the Completed button, the result set includes only those feedback items that are actually Received about yourself or a specified person, and not those items that are Pending.

## Feedback Item Deletion

If feedback deletion is allowed through configuration, users will be entitled to remove received feedback from the Feedback results list.

## Feedback Item Approval

If feedback approval is enabled the **Status** column indicates approval status. If the status is **Rejected**, the author of the feedback can make edits and resubmit the feedback for approval from the Feedback page. When approval is enabled, the Date field corresponds to the date the feedback is approved or rejected.

## Visual Cues to Distinguish Pending Items on Feedback Journal

The Feedback Journal displays line items for pending feedback requests in italicized bold text to readily distinguish from received feedback items. Pending items which are past their due date display italicized red text in the Date field.

## Send Reminder Option for Pending Items on Feedback Journal

Users have the ability to send a reminder for pending items from within the Feedback Journal. Right-click on the Feedback column for any pending item in the Results List and select the Reminder option to prompt the person about your feedback request. The person you send the reminder to receives both a message from you in their Employee Center's My Tasks list, and an email reminder.

## View Feedback Received or Requested from within the Module

Use the Received tab to display requested or received feedback items, whether Completed or Pending. The Feedback column displays the first line of any completed feedback content, from directly within the Results List, without having to open the feedback item. Upon mouse over a tooltip displays more of the feedback item. View the entire contents of the provided feedback by choosing *View Details* from the Feedback action menu, or by selecting More in the tooltip window.

The Feedback column displays the text *Pending* for any requested feedback items awaiting a response or an approval. This serves as a visual cue that you can choose the *Remind* option from the Feedback column action menu and send a reminder to the person who needs to provide the feedback. Once a reminder is sent, the date of the reminder appears in the status column.

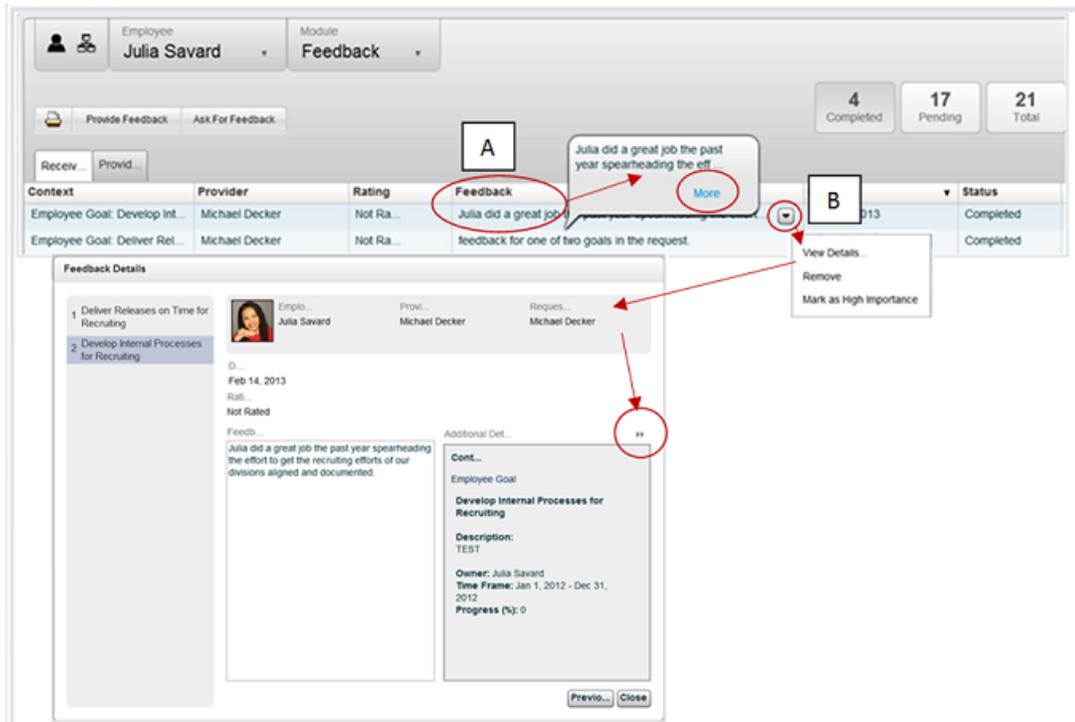


Figure: Feedback module page indicating two methods to display feedback details.

With respect to the figure immediately above:

- **A.** - The first line of feedback displays in the Feedback column. If the feedback is longer than the area provided, hover the cursor over the feedback and a popup tooltip provides more detail.
- **B.** - Another way to view feedback is to click on the contextual dropdown button and select View Details from the action menu. This opens the Feedback Details dialog. Within the Feedback Details dialog the Additional Details section can be collapsed to provide greater viewing area for Feedback.

### View and Provide Feedback from within the Module

Use the Provided tab to display feedback provided, and requests for you or others to provide feedback, whether they are Completed or Pending. The Feedback column displays the first line of any completed feedback content, from directly within the Feedback module, without having to open the feedback item. Upon mouse over a tooltip displays more of the feedback item. View the entire contents of the provided feedback by choosing *View Details* from the Feedback column action menu, or by selecting *More* in the tooltip window.

When feedback is requested from you, but is not yet provided, the Feedback column displays a visual cue stating *Pending*. The Date column also displays *Due* and the date your feedback is due. These visual cues serve to alert you to follow the Feedback column action menu's Respond link and provide the requested feedback.

### Provide Feedback Screen

When using the Provide Feedback screen, providers are prompted to use the People Selector dialog to select an employee. Once the Provide Feedback dialog is open, providers also have the ability to click the Change link to reopen the People selector, from where they can choose a different employee to provide feedback about, if desired.

When the "Enable Public Access to Feedback" setting is configured to Private, the Provide Feedback screen displays two checkboxes: Visible to Manager and Visible to Employee. When the setting is configured to Public, the two checkboxes are not displayed.

### Suggestive Actions on Dialog Screens

For dialog screens such as Provide Feedback, Ask for Feedback and others, the button for the next logical prominent action is highlighted. This does not prevent you from executing other active actions.

### Collapse Additional Details when Providing Feedback or Approval

When responding to a feedback request using the Feedback Details screen, or providing approval in the Feedback Approval screen, the user can collapse or expand the Additional Details field. This provides flexibility for increasing the edit area of the Feedback field, when needed.

In addition, when responding to a feedback request using the Provide Feedback dialog, the removal of the Due Date and Priority fields from the Overview screens provides more vertical room for increasing the height of the Feedback and Additional Details fields.

At the bottom of these dialog screens a series of buttons (Save, Previous, Next, Send and Cancel) are provided to advance and return through the editing and approval processes.

## Filtering Feedback Items on the Feedback Page

The feedback items you can view on the feedback page are subject to:

- the configuration of the "Enable Public Access to Feedback" setting (i.e. Private or Public).
- the employee selected in the breadcrumbs at the top of the page.

For more information refer to [Feedback Results List](#).

### Performance > [Navigation bar] > More dropdown > Feedback

1. You can view feedback items in the results list in one or more views: received or provided. Use the tabs at the top of the results list to select a view.
2. To further filter the feedback items displayed in the Results List, use the primary filters in the left side Filters pane: Date From/To, Provider, Context.

When no filters are defined, the list shows all feedback for the selected view: received or provided.

Note the filters apply to one view at a time only (i.e. to the feedback received or provided).

- To clear all default filters, click the Eraser icon.
  - Once filters have been selected, click the Refresh icon for the feedback journal list of entries to be updated according to your filter options.
3. If you want to further filter the entries displayed in the journal, use the three secondary filter buttons (Complete, Pending and Total) provided at the top right of the results list.

The buttons show counts of the number of lines in the results list for each of the categories. When clicked they serve as secondary filters within the view, providing a subset of the line items in the view. The result set displayed in the journal is reduced to line items meeting both the view criteria and the secondary filtering criteria of the chosen button.

The feedback result list will show all feedback items corresponding to your various private/public access, employee selection, tab/view, primary filter and secondary filter options.

## Viewing All Feedback You Received

The feedback items you view on the feedback page are subject to:

- the configuration of the "Enable Public Access to Feedback" setting (i.e. Private or Public).
- the employee selected in the breadcrumbs at the top of the page must be yourself.

For more information refer to [Feedback Results List](#).

### Performance > [Navigation bar] > More dropdown > Feedback

1. On the Feedback page, select the **Received** tab at the top of the results list.

The results list displays feedback received about yourself, solicited or unsolicited ; pending requests for feedback about yourself (requested by yourself or someone else); and requests for feedback about yourself (requested by yourself or someone else) that are pending approval.

## Viewing All Feedback You Provided

The feedback items you view on the feedback page are subject to:

- the configuration of the "Enable Public Access to Feedback" setting (i.e. Private or Public).
- the employee selected in the breadcrumbs at the top of the page must be yourself.

For more information refer to [Feedback Results List](#).

### Performance > [Navigation bar] > More dropdown > Feedback

1. On the Feedback page, select the **Provided** tab at the top of the results list.

The results list displays solicited and unsolicited feedback provided where you are the author: provided by yourself; pending requests for feedback you were asked to provide; and feedback you provided that are pending approval.

## Viewing All Feedback about a Direct Report

The feedback items you view on the feedback page are subject to:

- the configuration of the "Enable Public Access to Feedback" setting (i.e. Private or Public).

For more information refer to [Feedback Results List](#).

### Performance > [Navigation bar] > More dropdown > Feedback

1. In the breadcrumbs at the top of the page, the Employee selection defaults to yourself. Click the dropdown button and set the employee to one of your direct reports.

When the employee selected in the breadcrumbs is another employee (not yourself), the view in the Results list is for feedback items received about the other employee. No tabs are displayed at the top of the Results List.

## Sorting Feedback in the Results List

The feedback items you can view on the feedback page are subject to:

- the configuration of the "Enable Public Access to Feedback" setting (i.e. Private or Public).
- the employee selected in the breadcrumbs at the top of the page.

For more information refer to [Feedback Results List](#).

### Performance > [Navigation bar] > More dropdown > Feedback

1. To sort the list of feedback items according to a given column, you only need to click on the column header to sort in an ascending or descending order.  
It is possible to sort by all column, except by Feedback and Status.
2. To reverse the order, click again on the same column header.

Feedback will be sorted by the selected column, across all results list pages.

## Providing General Feedback from the Talent Browser

### Performance > [Navigation bar] > Talent Browser button

1. From an employee's performance card, select the down arrow to display the Go To menu.
2. Select **Send Feedback to the Employee** or **Send Feedback to the Manager**, depending on the desired recipient.
3. In the **Provide Feedback** dialog enter your feedback in the text box and format the text as needed.  
The text entry area allows for a maximum 6,000 characters. A counter lets you know how many characters you have left or are over the limit. Once you have reached the limit you can continue typing and editing, but the system will not allow you to save if the count is over the limit.
4. Optional. In the Approval section you can select an approver, if desired.
5. When input is complete, click **Send**.

## Providing General Feedback from My Network

General feedback is not related to any specific context and can be sent without having received a request for it.

### Performance > [My Network]

1. From the **My Network** panel, the feedback actions are available from the pull-down menu adjacent to each name.
2. You can select **Send Feedback to the Employee** or **Send Feedback to the Manager**, depending on the desired recipient.
3. In the **Provide Feedback** dialog enter your feedback in the text box and format the text as needed.  
The text entry area allows for a maximum 6,000 characters. A counter lets you know how many characters you have left or are over the limit. Once you have reached the limit you can continue typing and editing, but the system will not allow you to save if the count is over the limit.
4. Optional. In the Approval section you can select an approver, if desired.
5. When input is complete, click **Send**.

## Providing General Feedback from the Feedback Page

Feedback provided via the Feedback page is always unsolicited and not related to any specific context. Unsolicited feedback provided from the Feedback page can only be sent to the person the feedback is about and the manager of that person.

### Performance > [Navigation bar] > More dropdown > Feedback

1. In the Feedback page click **Provide Feedback**.
2. In the **People Selector**, select the person about whom you want to provide feedback and click **Select**.
3. In the **Provide Feedback** dialog enter your feedback in the text box and format the text as needed.  
The text entry area allows for a maximum 6,000 characters. A counter lets you know how many characters you have left or are over the limit. Once you have reached the limit you can continue typing and editing, but the system will not allow you to save if the count is over the limit.
4. Optional. In the Approval section you can select an approver, if desired.

5. When input is complete, click **Send**.

## Replying to a Feedback Request from My Tasks

Feedback needs to have been requested for an item for a user to be able to reply.

### Performance > Employee Center > My Tasks

1. In **My Tasks** panel, use the selector to choose the **Feedback Request** category.
2. Click on the appropriate task to select and highlight it.
3. In the reply form, click Start.
4. For each item in the feedback request:
  - a. Provide your feedback in the comment box.
  - b. Provide a rating if requested by the sender.
  - c. Enter an approver if appropriate.
5. Use the **Next** and **Previous** buttons to navigate to other items in the feedback request.
6. When feedback has been provided for all requested items, save the provided information and click **Finish and Send**.

The feedback is sent to the person who requested it and an email notification will be sent to that person if such notification was set to be sent. The feedback request task is also removed from **My Tasks**.

## Replying to a Feedback Request from Results List

Feedback needs to have been requested for an item for a user to be able to reply.

### Performance [Navigation bar] More dropdown Feedback

1. Click the Provided tab to populate feedback items for that view into the Results List.
2. Click the Pending button.  
The results list is pared down to just pending feedback requests.
3. Select the appropriated feedback item.
4. In the Feedback column for the item click the dropdown list and select Respond from the Action menu.
5. In the reply form, click Start.
6. For each item in the feedback request:
  - a. Provide your feedback in the comment box.
  - b. Provide a rating if requested by the sender.
  - c. Enter an approver if appropriate.
7. Use the **Next** and **Previous** buttons to navigate to other items in the feedback request.
8. When feedback has been provided for all requested items, save the provided information and click **Finish and Send**.

The feedback is sent to the person who requested it and an email notification will be sent to that person if such notification was set to be sent. The feedback request task is also removed from **My Tasks**.

## Removing Feedback from the Feedback Page

Removing feedback is only possible when the setting **Allow Feedback Deletion** has been set to **Yes**. When allowed, the Remove action is available; otherwise, it's not.

Feedback can only be removed from the **Received** feedback view. It cannot be removed from the **Provided** view.

### Performance > [Navigation bar] > More dropdown > Feedback

1. In the Feedback page, select the **Received** tab/view.
2. As needed, refine the list by using the available filters and sort in order to locate the feedback to delete.

3. Once the feedback item is found, click the dropdown list in the Feedback column and select **Remove** from the Action menu.
4. Click **Yes** to confirm the action.

The feedback will be removed from the list of received feedback in the Results List. If you are entitled to view feedback about yourself or about your direct reports coming from anybody, the feedback will only be removed from your list of received feedback, therefore preventing a feedback sent or received by someone else from being deleted from your Feedback page.

Both the sender and the recipient must remove a feedback from their received views for it to be removed from both person's received views.

## Flagging Feedback as Important

**Performance > [Navigation bar] > More dropdown > Feedback**

1. On the Feedback page, select the **Received** tab at the top of the results list.  
The results list displays feedback received about yourself, solicited or unsolicited ; pending requests for feedback about yourself (requested by yourself or someone else); and requests for feedback about yourself (requested by yourself or someone else) that are pending approval.
2. Locate the feedback item you want to flag as important, click the dropdown button in the Feedback column, and select Mark as High Importance from the Action menu.

A red flag will display in the Important column for the selected feedback item.

## Requesting General or Specific Feedback from Feedback Journal

- Feedback requested via the Feedback page can be requested specifically about a context (category) of information (General, Career Scenario, Competency Goal, Development Activity, Employee Goal or Review).
- Requesting feedback from other employees in the organization can enable you to make a better evaluation of an employee's proficiency regarding a goal, a competency or a custom item and help you make a decision regarding a development activity to undertake.

**Performance > [Navigation bar] > More dropdown > Feedback**

1. In the Feedback page, click **Ask for Feedback**.  
In the **Ask for Feedback** dialog the name of the person who you want to request feedback about displays at the top. The Change link displays to the right of the name.
2. If you want to request feedback about a different person, click Change to open the People Selector dialog and select the person.
3. In the **Ask for Feedback** dialog select the person who you want to provide the feedback.
4. Use the Context selector to indicate whether the feedback requested is general or specific for a particular context: General, Career Scenario, Competency Goal, Development Activity, Employee Goal or Review.  
You can also specify a certain option within a context, where items are available. For example, within a Career Scenario you can limit the feedback to a particular career option.
5. Specify a due date as well as the priority level for the feedback.
6. In the comment box, edit the default message and format the text if as needed.
7. When input is completed, click **Send**.

The recipients will receive a feedback request in their **My Tasks** panel. Also, an email notification will be sent if such notification was configured.

## Feedback Report

Employees and managers are able to print the Feedback results list, including pending feedback requests, to a PDF format Feedback report. Employees are able to generate a Feedback report for themselves, while managers can generate reports for themselves and their employees.

### Printing the Feedback Report

When you click the Print Button on the toolbar at the top of the Feedback page, feedback items currently displayed in the selected view are printed to a PDF format report. The Feedback report captures the information available within the context of the Feedback page and results list at the time you run the report. The feedback you see depends on the filters applied to generate the results list:

1. The configuration setting **Enable Public Access to Feedback**.
2. The employee selected in the breadcrumbs at the top of the page.
3. The view selected (Received or Provided).
4. The primary filters selected: Date Range, Provider and Context.
5. The secondary filter selected at the top of the journal list (Complete, Pending and Total).

The generated PDF version of the feedback report can be viewed online, printed, or saved to a local machine using the functionality of your chosen browser. Saved copies can be attached to other sections of Performance; such as Reviews and Goal Plans.

### Feedback Report Output

The first page of the printed Feedback report includes the name, photo and contact details of the person printing the feedback. At the upper right the print date format is fixed and always displays the timezone of the print server, which may not match your timezone. The main body of the Feedback report provides information about feedback items that is context sensitive to the settings for the Feedback page when you printed the report. When you are printing a view that includes pending feedback, it will display a separate entry for each person who has been sent a feedback request. For example, if ten people are sent feedback requests on a single subject at the same time, and eight of them are still pending, the report will include individual entries for each of those eight people.

### Feedback Report Content Determined by Journal View Context

The following table shows how the fields that display in the Feedback report are determined contextually, depending upon the view selected for the results list.

View setting (tab at the top of the results list)	Feedback Report Title (in Feedback report)	Feedback Section Fields (in Feedback report)	Pending Section Fields (in Feedback report)
Received	Feedback Received About	Context, Provider, Rating, Feedback. Date, Status, Importance Flag.	Context, Rating, Provider, Feedback.
Provided	Feedback Provided By	Employee, Context, Requester, Rating, Feedback, Date and Status.	Context, Rating, Provider, Feedback.

## To Print a Feedback Report

- You want to print feedback items listed in the Feedback page's results list.
- You must apply appropriate selection and filtering values to the Feedback page such that feedback items display in the results list. Otherwise, no entries will populate the Feedback report.

**Performance > [Navigation bar] > More dropdown > Feedback**

1. Click the Printer icon on the Feedback page toolbar.  
The Feedback report is contextual, the system includes only the feedback entries you see on the results list at the time you print the report.  
The system generates a PDF format report of the entries in the journal view and displays the report on the screen.
2. Use your browser's Save and Print functions to download a copy of the report to a local machine, or print a copy of the report, respectively.

A PDF is generated, which can be saved or printed.

## Print Feedback Report Scenarios

The following table provides examples of view and filter selections for common feedback report scenarios.

Scenario	View Selector	Filter Setting
Print all received feedback about yourself.	Received	You are the employee selected in the breadcrumbs.
Print all provided feedback by yourself.	Provided	You are the employee selected in the breadcrumbs.
Print all received feedback about one of your employees.	Received	The employee selected in the breadcrumbs is another employee. Use secondary filter button Total.
Print all feedback requests you have sent that are pending.	Provided	You are the employee selected in the breadcrumbs. Use secondary filter button Pending.

## Feedback Approval

This allows feedback to be reviewed and approved before being sent to recipients.

Feedback approval consists of the following:

- approval can be requested when responding to a feedback request or when providing unsolicited feedback
- the person providing feedback has the option to select anyone as the feedback approver
- requesting feedback creates an approval task for the approver, subsequently rejecting feedback creates a resubmit task for the provider
- notification of feedback approval and rejection tasks can be displayed in Oracle Taleo Inbox
- selecting an approver is optional, not selecting one sends the feedback directly to the recipient

## Configuration

Configuration > [Performance] Settings	
Name	Description
Enable Feedback Approval	Enables feedback approval functionality in the system. It controls if the approver selector and details are displayed in the feedback form and if the Status column is displayed in the Sent view of the Feedback Journal. It also controls the approval workflow mechanism. Disabled by default.

The following message templates are used for feedback approval.

Configuration > [Performance] Message Templates	
Type	Description
Standard notification for feedback approval completion	This is used when the approver has made a decision on the feedback. If it is approved, it is sent to the recipient. If it is rejected, the feedback author can update the feedback and resubmit it for approval.
Standard notification for a feedback approval	This is used to notify someone they have been asked to approve feedback.

These message template variables are used to identify the employees and subjects of the feedback approval.

Configuration > [Performance] Message Templates	
Variable	Description
{Feedback.FeedbackAuthorName}	This is the approver who is providing approval of the feedback request.
{Feedback.RequesterName}	This is the person who is providing feedback and making the request to have it approved.
{Feedback.SubjectEmployeeName}	This is the subject of the feedback. It can be an employee or it can be an object, such as an employee goal or development activity.

## To Get Feedback Approved

**Enable Feedback Approval** configuration setting is activated.

1. From My Network, Go To menu, Supporting Tools, or the Feedback Journal choose to send unsolicited feedback about an employee, or from My Tasks select a feedback request.
2. After entering feedback, click the Magnifying Glass icon for the **Approver** field and select who should receive the feedback.  
  
When providing feedback for a module, such as a performance review, you must first select **Approval** from the left-side menu.
3. Click **Send** and an approve feedback request is sent to the approver.
4. From their tasks list, the approver selects the Approve feedback request to display the feedback.
5. If the feedback is acceptable, the approver clicks **Approve Feedback** and the feedback is sent to the recipients.
6. If the feedback isn't acceptable, the approver can add comments and click **Reject Feedback** to create a Review Feedback Rejected task for the sender.

The feedback is not sent to the recipient.

When approving feedback for a module, such as a goal plan, first **Approval** must be selected from the left-side menu.

7. Select the task to access the feedback and view the rejection reason to learn why it was rejected, then make the required changes and return to Step 3 to continue the process.

You can resubmit the feedback to a different approver.

## Feedback Deletion

The Feedback Deletion feature provides customer system administrators having the Integrator role the ability to remove feedback comments and ratings from Performance that are deemed inappropriate, inaccurate or not adhering to organizational communication and feedback policies. Feedback deletion is done with the Taleo Connect Client (TCC), using an addition to the Performance PIP (product integration pack).

### Introduction.

Inappropriate or inaccurate feedback may be entered into Performance by end-user "providers" of feedback. The administrator may perform feedback deletion as needed, or as a regularly scheduled task (for example 3-4 times per year). The deletion process involves the administrator performing an export of feedback content to a CSV file. Since providers often enter feedback content using a rich text editor field, the exported content can contain HTML formatting code that makes it hard to read the content in the CSV file. This formatting code must be removed upon export for the administrator to be able to read the feedback content.

The system administrator uses the TCC to perform the following steps:

1. Use TCC to export the feedback content to a CSV file and run a transformation to cleanse the CSV file of rich text formatting code.
2. Use Excel to select rows in the CSV file for removal, and then use the TCC to run an import operation to delete them from the production database.

While **Feedback Removal** allows users to prevent certain feedback content from being visible in the application, **Feedback Deletion** removes feedback content from the database. For details on how to perform feedback deletion see the **Oracle Taleo Enterprise Edition Administration Guide for Performance**.

## Talent Profile

The Talent Profile summarizes and represents the employee's record within Performance. It contains general information about the employee drawn from the employee's user account; as well as metrics, review history, compensation, competency, employee, education, work experience, certification and job preference information. Generally the sections of the talent profile are highly configurable. Custom sections can also be configured by system administrators and added to the Talent Profile.

### User types, Visibility Groups and Access to the Talent Profile

The Talent Profile is intended to be viewable by the employee and their managers. Depending on configuration they will be able to see all or some of the available fields in the Talent Profile sections. Depending upon the implementation employees will have the ability to edit some of the information presented in their profile.

#### User Types

A user's access to Talent Profile sections is subject to user type permissions security. There are the following Talent Profile-related user type functional domains:

- Employee Metrics: Access to employee metrics and user-defined employee metrics and access to the General section.
- Employee Profile: Access to Talent Profile standard and custom sections.
- Performance Review: Access to Review History and General Sections.
- Compensation: Access to Compensation and General Sections.

### Visibility and Availability Groups

A visibility group is simply a subset of the employees in your organization. For example, you might want to define a group for American senior executives. The visibility group would be defined using Location equals USA, and Job Level equals Senior Executives.

The Visibility and Availability Groups feature, configured in the Talent Profile Layout pages, provides a second tier of security at the Talent Profile section level. Visibility groups work in addition to the User Type permissions security, which takes precedence. The visibility group configurations allow an administrator to further restrict access to talent profile sections. Sub-sections inherit the section security. Visibility groups can be applied in all Talent Profile section configurations, with exceptions for General and Competencies:

- The General section has no section level availability configuration, as it is always available. It also does not support the control of section visibility, nor does it have field level visibility configuration.
- The Competencies section does have section level availability configuration, but not section visibility control. Competencies do have role-based, field level visibility configuration.

For more information about configuring User Types and Visibility Groups see the Oracle Taleo Enterprise Edition Administration Guide for Performance.

## Viewing and Editing the Talent Profile

The following represents a general business process overview for viewing and editing the Talent Profile:

1. Prerequisite - The sections of the Talent Profile are configured by the HR Administrator. The configuration for your organization's implementation determines which sections and fields are displayed and/or editable by the manager or the employee.
2. Open the Talent Profile (Navigation bar > Profiles).
3. An employee's Talent Profile can be viewed and printed by the employee and managers.
4. When viewed by the employee, much of the information shown in the Talent Profile can be edited by the employee; except for the information shown under the General, Compensation and Review History sections.
5. When viewed by the employee's direct or high-level manager, metric information is also available on the Talent Profile and can be edited as needed.

## Sections in the Talent Profile

The following sections, listed here with default name and order, are available to display in the Talent Profile. When a section is configured to be displayed in the Talent Profile, a corresponding link for the section displays in the left side menu.

Section Name	Available Actions
General	View, Change Photo, Print

Section Name	Available Actions
Metrics	View, Expand/Collapse, Show History, Edit, Save/Cancel, Print.
Review History	View, Print
Compensation	View, Print.
Competencies	View, Expand/Collapse, Edit, Add/Delete, Save/Cancel, Print, Filter by Current Job Role or All.
Employee Information	View, Expand/Collapse, Edit, Save/Cancel, Print.
Education	View, Expand/Collapse, Edit, Add/Delete, Save/Cancel, Print.
Work Experience	View, Expand/Collapse, Edit, Add/Delete/Move in Order, Save/Cancel, Print.
Certification	View, Expand/Collapse, Edit, Add/Delete/Move in Order, Save/Cancel, Print.
Job Preference	View, Expand/Collapse, Edit, Add/Delete/Move in Order, Save/Cancel, Print.
Attachments	View list, Expand/Collapse, Add/Delete, Print list.
Succession Plans	View.
Custom	Create a custom section populated with standard and user-defined fields to meet your business needs.

## Printing the Talent Profile

Print the content displayed in the Talent Profile using the Print button located on the Actions toolbar, just above the General section. When printing a talent profile you can select which sections to include, with the exception of the General section which is always included. The sections available to be printed are dependent on your permissions. Print output is dependent upon what you can see in the Talent Profile, and what you have selected in the print dialog when printing is initiated. The selected sections will be printed in the same order as seen in the Talent Profile.

### General Section

The Talent Profile's General section provides a visual header for the Talent Profile. It is a partially configurable section, you can customize six of the fields in the General section. The General section is unique in that it is divided into two subsections by a horizontal, thin gray line.

The region above the line contains elements which are not configurable (i.e. Current Job). The region is generally not editable by the user, with the exception they can upload an employee photo there.

The region below the line contains elements which are configurable (e.g. location, contact and organization information). The region below the line is always 50/50 Split into two columns, this is not a configurable attribute. Up to 6 fields may display below the gray line. None are editable by the user.

The General section is available and visible for all users. Availability and visibility configuration of this section is not provided.

The General section is the one section of the Talent Profile always included when you print a profile.

### Employee Image in the General Section

Beginning with Feature Pack 12C a larger image size is displayed in the General section. It is 256 x 256 pixels, larger than in the Performance Card. The larger image will not display automatically for users migrating from a prior Feature Pack. By default the larger image is shown as a silhouette, as employee photos from prior implementations are in smaller size. Employee photos need to be re-imported in order to have them shown on the General section.

**Note:** There are several ways to get the larger employee images to display on the General Section:



- Manually update a photo within the user's General section.
- Update a photo through a user's SmartOrg user account.
- Use the Taleo Connect Client (TCC) to batch load employee photos.

## Metrics Section

The Metrics section provides the employee's metrics information. Content displayed includes employee review and goal ratings and supporting employee metrics. The metrics display is for the managers of the employee. The section is editable for some fields.

### Customizable Employee Metrics Use in the Talent Profile

Only activated employee metric values are available in the Talent Profile's selection lists. However, the metric values previously used in employee records are not automatically changed even though certain values may be deactivated in Configuration.

Users can view metrics history in the Talent Profile by clicking the More Actions button at the top of the Metrics section. The actions list provides the following options:

- Nominate for Position
- Show History
- Create Report

When the user selects the Show History option, the Metrics History dialog provides options for the following employee metrics:

- Review Rating
- Potential
- Risk of Loss
- Promotability Readiness
- Reassignment Candidate
- Competency Rating
- Goal Rating
- Impact of Loss

Potential, risk of loss and promotability readiness are customizable.

### Metric History Tracking

At the top of the Talent Profile page is a toolbar including a Print button and a More Actions menu. An option provided in the print dialog is to select Metric Show History and include it in Talent Profile print output. (Navigation: Performance > Employee Center > Navigation bar > Profile > Header section > Print button.)

The More Actions menu includes a Show History option. Selecting this option opens the Metrics History dialog, where you can set the system to show history for selected employee metrics.

### Review History Section

The employee review history data displayed on the talent profile can include the date, manager, overall review rating, goal rating, and competency rating. This section is not editable. Details can come from the last five completed reviews. Values are taken from the historical review table, so active reviews cannot be included. The rating values are based on

the corresponding metric rating model and displayed according to the Metric Rating Display setting. For instance, a metric rating model that uses names (Poor, Average, Good) and numeric values (1, 3, 5) coupled with a rating display value **In text and numeric format** would display ratings such as **Average - 3**.



**Note:** The most recent Review Rating entry in the Review History Section will match the Last Focal Review Rating in the General Section, if it is displayed. Other ratings displayed in the General Section do not align with Review History section ratings.

In the Review History section configuration all the review history-related fields are selected to set them to "Displayed" by default. The administrator has the option of unselecting any or all of them to make them "Not Displayed".

### Compensation Section

The Compensation section displays the employee's compensation history data. Content displayed includes current salary, and bonus and stock awards. This section is not editable by the user.

### Competency Section

The Competency section is editable. Users can view, add, remove and rate competencies for themselves directly into this section. Users can also filter competencies to show all competencies or just those competencies related to their current job role. The section displays competency data for various areas such as Behavioral, Job-Specific and Language. The ability to view and edit competencies in this section is dependent on section configuration and your specific user type permissions. The user type relates to the talent profile that is viewed. The same user will have different user type access to employee competency settings, depending on that user's relationship to the user whose talent profile they wish to view. It is important to note that these competency specific user types do not relate directly to the standard user types as defined in SmartOrg.

For example, when Michael Decker views his own talent profile, he is accessing it as an employee and the competency settings for an employee user type apply. When he views the talent profile of Renee Washington, who is one of his direct reports, he is accessing it as a manager and the competency settings for a manager user type apply. Chris Baker reports directly to Renee Washington, so if Michael Decker was to view his talent profile it would be as a high level manager and the corresponding competency settings are applied.

When adding a new competency in the Talent Profile, the Competency Selector dialog enables you to search for the competency using keywords. Filters are also available to assist in searching the list of competencies, depending upon configuration. If competencies in the section are configured to be grouped by Type, then the available filter options are Group and Category. If competencies are configured by Group, the available filter options are Type and Category.

### Employee Information Section

The Employee Information section provides general employee information; such as their current position. The section is editable.

### Education Section

The Education section provides employee education information; such as Institution, Program, Educational Level, Start and Graduation Date. The section is highly editable by the employee. They can add, remove and edit records. If LinkedIn Integration is enabled employee's can import LinkedIn profile information to this section.

### Work Experience Section

The Work Experience section provides employee job history information; such as employer, job title, start and end date, supervisor information, and tasks and achievements. The section is highly editable by the employee. They can add, remove and edit records. If LinkedIn Integration is enabled employee's can import LinkedIn profile information to this section.

## Certification Section

The Certification section provides employee certification information; such as certification, certification number, expiration date, organization, location, etc. The section is highly editable by the employee. They can add, remove and edit records. If LinkedIn Integration is enabled employee's can import LinkedIn profile information to this section.

## Job Preference Section

The Job Preference section provides employee job preference information; such as for jobs, work locations and organizations. The section is highly editable by the employee. They can add, remove and edit records.

## Attachment Section

The Attachments Section provides a place for employees to attach supporting documents. They can add and remove attachments. The system adds the Attached By person and Date to the display. HR Administrators can also add information to employee profiles on their behalf by attaching documents to their Talent Profiles using TCC. This feature helps organizations that want to import attachments including, but not limited to, resumes and cover letters, performance reviews from another system, and journal articles.

The Talent Profile must be configured to allow attachments, and Administrators must make the attachment section visible in the Talent Profile if they want users to have visibility to that section. TCC allows for 1 MB per attachment and allows 10 different file types.

For more information on how to attach files using TCC, refer to the Oracle Taleo Enterprise Edition Integration Taleo Connect Client User Guide, Feature Pack 15A.

## Succession Plans

The Succession Plans section displays as a table with the following columns: Job Position, Incumbent, Readiness and Interim Replacement. The list of Succession Plans included in the table are dependent upon the logged in user's security permissions. A message displays at the bottom of the table indicating how many of the Succession Plans are displayed due to security restrictions. For example, a message may state, "*Currently 9 out of 12 succession plans are visible based on your permission.*"

## Configuration

### Printing Talent Profiles

There are no specific configuration settings. Overall talent profile settings and user permissions control what can be displayed and subsequently printed.

### Employee Review History

The settings under Review History can only be set to displayed. They cannot be set to editable. If no Review History fields are displayed the section is hidden.

Configuration > [Performance] Administration > [Employee Management] Talent Profile Section Configuration	
Name	Description
<b>Properties</b>	
Maximum number of historical reviews	Indicates how many reviews are included on the Talent Profile, displaying the data as configured in the Review History section. These are performance reviews that have a status of closed and are available from the historical review table. Select a value between 1 and 5. The default is 3.

Configuration > [Performance] Administration > [Employee Management] Talent Profile Section Configuration	
Name	Description
<b>Review History</b>	
Effective Date	The date on which the review was closed and the score added to the historical review table.
Manager	The name of the manager who owns the review.
Review Rating	Overall review rating score given by the manager for the review. The value is based on the final score of the review, which uses the 'Review Rating' Metric Rating Model setting to determine the available values. It is formatted based on the Metric Rating Display setting.
Goal Rating	Review rating score for only the Goal section of the review. It is possible this value could be empty, while there is still an overall review rating score. The value is based on the final goal score, which uses the 'Goal Rating' Metric Rating Model setting to determine the available values. It is formatted based on the Metric Rating Display setting.
Competency Rating	Review rating score for only the Competency section of the review. It is possible this value could be empty, while there is still an overall review rating score. The value is based on the final competency score, which uses the 'Competency Rating' Metric Rating Model setting to determine the available values. It is formatted based on the Metric Rating Display setting.

## Succession Plan List Table

Configuration > [Performance] Administration > [Talent Profile Management] Talent Profile Layout > Details > Add Fields	
Name	Description
Standard Field Group field type and Succession Plan List field	The configuration settings chosen here within the Administration pages displays as a table in the user interface.

As with any field that displays review scores in the Talent Profile, if values are not available based on the combination of rating model and metric display rating, then Not Available is displayed for that field.

The view permission for **Performance > Reviews** must be enabled for users to be able to see the review history.

## Editing a Talent Profile

**Performance > Employee Center > [Navigation bar] Profile (for your own Talent Profile)**

**Performance > Employee Center > [Navigation bar] Profile > [Smart Breadcrumbs] Employee (if you are a manager change to profile for another employee)**

**Performance > Employee Center > [Navigation bar] Talent Browser button > Select an employee (if you are a manager) > Select Talent Profile**

1. In the Talent Profile, use the Menu on the left, or the scroll bar on the right, to go to the section you want to modify and click **Edit**.

Depending on your user permissions, some sections may not be editable. The General, Review History and Compensation sections are generally not editable by anyone, with the exception of the employee photo in the General section.

2. Click Edit to update the section details:

- In the **General** section, hover your mouse over the employee photo and click the Change Photo popup link to upload a different employee photo.
- In the **Metrics** section, click Edit and you can modify standard and custom metric values.
- In the **Competencies** section, the Competency Selector enables you to immediately search for a competency using keywords, or you can refine your search by filtering the *Type*, *Group* and *Category* before you enter keywords. The filters refresh the results automatically, while you must select **Go** to search by keywords. From the Development Activity column you can create and assign activities by clicking the Right Arrow icon.
- In the **Employee Information** section, the values are custom user-defined values and can include a number of different types, such as check boxes, drop-down lists and date fields.
- In the **Education, Work Experience and Certification** sections, you can add, edit and remove entries. You can also reorder them. If LinkedIn Integration is enabled, you can import LinkedIn profile information into these sections of the Talent Profile.
- In the **Job Preferences** section, you can change details such as: your willingness to move, which disciplines you would like to work in, which locations you would work at. Do this using a combination of drop-down lists, free text fields and selectors.



**Note:** When selecting and saving the Organization, Location and Job Fields in this section, the parent values in a hierarchy are not displayed in the list when specific leaf values are also selected. When only a parent value is selected and saved, it is displayed in the list. For example, if the three locations Canada, Canada - British Columbia, and United States are selected; only two are displayed, Canada - British Columbia and United States. The parent value Canada is omitted from the list because a leaf of Canada is selected.

- For the **Attachments** section, see *To attach files*.

3. Click **Save** at the section-level as you complete edits on each section.

4. Repeat steps 2 - 3 as needed for additional section edits.

All changes made to the Talent Profile information will be displayed to the employee and reflected in other integrated Oracle Taleo Enterprise Edition applications, as described by *Talent Master Profile*.

## To Print a Talent Profile

### Performance > Navigation bar Profile

1. Click the Printer icon on the toolbar just above the General section.
2. In the Print Options dialog select the checkbox for each section you want included. The General section is always included. You can also opt to include Metrics History in the print output.

The dialog displays checkboxes for those sections your configuration displays in the Talent Profile. While the order of the sections in the print dialog may be different than in the user interface, when printed the sections will match what is displayed in Performance. You cannot select to print only part of a section.

3. Click **Print**.

A PDF is generated, which can be printed or saved. It includes the selected sections, company logo, employee photo, generation date, and page numbers.

## LinkedIn Integration

The Talent Profile can be integrated with LinkedIn, to allow an employee's LinkedIn profile information to be imported to and used in the Work Experience, Education and Certification sections of their Talent Profile.

### Importing LinkedIn Data to a User's Talent Profile

The "Import from LinkedIn" option is only available to the owner of the Talent Profile, and only when the Enable LinkedIn Integration and Talent Profile Settings configurations are set up. The option displays as a button available on three Talent Profile sections: Work Experience, Education and Certifications. It displays alongside text stating "Last Import on [Datestamp]".

### LinkedIn Information Available for Import

You can selectively import information from LinkedIn fitting the Work Experience, Education and Certification sections of the Talent Profile. The information available for import from LinkedIn is:

- Work Experience: Other Function Position, Other Employer Position, Start date Position, End date Position, Current Job Position, Achievements Position.
- Education: Other Institution Education, Other Program Education, Start date Education, End date Education.
- Certifications: Other Certification, Number/ID Certification, Issue Date Certification, Expiration Date Certification.

## To Import LinkedIn Information

- LinkedIn Integration must be enabled by Support.
- Customer must enter LinkedIn API keys in Talent Profile Properties configuration.
- Employee must have LinkedIn profile information entered in LinkedIn.

### Performance > [Employee Center] > [Navigation bar] > Profile

1. If LinkedIn Integration is enabled and configured you will see the Import from LinkedIn button at the header level for the Work Experience, Education and Certification sections.
2. Click the Import from LinkedIn button from within the context of one of the desired sections (e.g. within Work Experience).
3. You are prompted by a legal disclaimer. Click Yes to agree with the disclaimer and proceed.  
The legal disclaimer is a reminder about the need to close your login session in LinkedIn, even after you have logged out of Performance. Otherwise your LinkedIn account remains open for a period of time, leaving it vulnerable to the next user who logs onto the machine. The legal disclaimer and LinkedIn authentication dialog only display once for a login session.
4. When prompted for LinkedIn authentication, enter your LinkedIn login information and click OK.
5. The Add dialog displays all the LinkedIn profile information/records for the section you are working from (e.g. Work Experience).  
For example, if you are working from the Talent Profile's Work Experience section, the dialog is named "Add Work Experience from LinkedIn", and it displays a list of the employers (work experiences) you previously entered into your LinkedIn account.
6. To review the employment information click on each record name to view its detail information.
7. To select a record(s) for import click the checkbox(es) to the left of each one.  
The Add button is activated when you select a record.
8. Click Add to import the selected information from LinkedIn into the Talent Profile.  
LinkedIn information is transferred to your working Talent Profile section (e.g. Work Experience) section.
9. Save your work when done.



**Note:** Do not forget to log out of your LinkedIn session. Your login authentication to LinkedIn lasts until your LinkedIn session is logged out.

## Talent Profile Fields and Buttons

Standard and Employee Metric type fields available for display in Performance's Talent Profile are presented in the following table, by alphabetical order of field name. Entries in the table include the name of the field, and a description. Many of the fields are available to be configured into more than one of the Talent Profile sections. The display of sections and fields in the Talent Profile are highly configurable. The fields you actually see are subject to your organization's implementation.

Name	Description
Achievements	Free-form text box indicating additional tasks and achievements. Tasks and Achievements in Performance.
Anticipated Graduation Date	Flag indicating that the anticipated graduation date is in the future.
Bench Strength	Metric that represents an enumeration value based on the number of successors in the succession plan for the position. Possible values are: None (no succession plan exists), Poor (no successor has been defined on the existing succession plan for the position), Average (there is 1 successor) and Good (there are 2 or more successors). This value is not editable in the Talent Profile.
Bonus	Amount and/or percentage of the bonus.
Bonus Plan	Name of the bonus plan.
Can we Contact the Supervisor	Flag that indicates whether it is possible to communicate with the supervisor to get further information.
Certification	Name of the certification. When adding a new certification, it must be selected from the Certification Selector.
Certifications	Section of the Talent Profile that presents the certifications of the employee.
Competencies	Sub-section of the Competencies section that lists behavioral competencies.
Competency Rating	Metric that indicates the competency rating on the last closed review, based on the review section configured to provide the basis for this rating.
Competency Rating	Review rating score for only the Competency section of the review. It is possible this value could be empty, while there is still an overall score. The value is based on the final goal score, which uses the 'Competency Rating' Metric Rating Model setting to determine the available values. It is formatted based on the Metric Rating Display setting.
Critical	Metric that indicates whether the position occupied by the employee is critical or not. This value comes from the Job Position's Criticality field in SmartOrg and is not editable in the Talent Profile. The position is considered critical when the Criticality field value in SmartOrg is 5; all other Criticality field values (1 to 4) represent a non-critical position.
Current Position	Current position of the employee, as defined in the employee's user account in SmartOrg.
Current Review Status	The status of the employee's current review, such as draft or complete.
Current Salary	Annual salary of the employee.
Custom Metrics	Section of the Talent Profile that shows any user-defined metric field.
Development Activities	Activities the employee engages in to develop their job skills.

Name	Description
Development Overall Progress	The overall progress of the employee's development plan, indicated as a percentage.
Development Overall Progress	The overall progress of the employee's development plan, indicated as a percentage.
Education	Section of the Talent Profile that presents education information about the employee.
Education Level	Level of education attained, selected from a list of defined levels.
Education Level	Education level preferred by the employee.
Effective Date	Date on which the new salary starts.
Effective Date	Date on which the bonus is being paid.
Effective Date	The date on which the review was closed and the score added to the historical review table.
Email	Email address of the employee at his current position.
Employee Information	Section of the Talent Profile that presents custom employee information.
Employee Status	Employee status preferred by the employee.
Employee's Rating	Rating given by the employee for the competency in the last focal review, that displays in the Talent Profile when the review is closed and the Update Talent Profile option is selected. The text value however is derived from the rating model associated to the specific behavioral competency. The display of this dimension in the Competencies section of the Talent Profile is based on a setting defined in the administration application. The rating can be edited if so configured in the administration application.
Employer	Name of the employer. When adding a new work experience, the employer must be selected from the Employer Selector.
End Date	End date for the job function.
Experience	Number of years of experience in the particular competency, which can only be defined and edited by the employee. The display of this dimension in the Competencies section of the Talent Profile is based on a setting defined in the administration application. The rating can be edited if so configured in the administration application.
Expiration Date	Date the certification expires.
Ext.	Phone extension of the employee at his/her current position.
Gap Analysis Score	The difference between the recommended rating for each competency in a job role and the rating the employee has for each competency.
General	Section of the Talent Profile that presents general information about the employee.
Goal Rating	Metric that indicates the goal rating on the last closed review, based on the review section configured to provide the basis for this rating.
Goal Rating	Review rating score for only the Goal section of the review. It is possible this value could be empty, while there is still an overall score. The value is based on the final goal score, which uses the 'Goal Rating' Metric Rating Model setting to determine the available values. It is formatted based on the Metric Rating Display setting.
GPA	Field that indicates the Grade Point Average, that is the mathematical calculation of where an average of the grades falls on a defined scale. For example, the value could be 3.44 out of 5.
Graduation Date	Date the education was completed and the employee graduated.
Grant Date	Date on which the stocks will be vested.

Name	Description
Grant Type	Type of stock.
Has Development Plan	Metric that indicates whether the employee has a development plan or not.
Impact of Loss	Metric that indicates how important the employee is in their job function.
Increase	Amount and/or percentage of the salary increase.
Increase Type	Type of salary increase.
Incumbent - Succession Plan List table	The name of the person currently in the position. If vacant, this is blank. This value comes from the Succession Plan of the employee and is not editable in the Talent Profile.
Institution	Name of the educational institution. When adding a new education, the institution must be selected from the Institution Selector.
Interest	Level of interest in the particular competency, which can only be defined and edited by the employee. The display of this dimension in the Competencies section of the Talent Profile is based on a setting defined in the administration application. The rating can be edited if so configured in the administration application.
Interest in International Assignment	Willingness to work abroad.
Interim Replacement	Metric that indicates if an interim replacement has been set for the position occupied by the employee. This value comes from the Succession Plan of the employee and is not editable in the Talent Profile.
Interim Replacement - Succession Plan List table	Whether or not this employee is the interim replacement named for the position. This value comes from the Succession Plan of the employee and is not editable in the Talent Profile.
Issue Date	Date the certification was issued.
Job Fields	Job fields of interest, including category, function and specialty.
Job Function	Name of the job function. When adding a new work experience, the job function must be selected from the Job Field Selector.
Job Level	Job level preferred by the employee.
Job Position - Succession Plan List table	Position within a Succession Plan that the employee is denoted as a possible successor. This value comes from the Succession Plan of the employee and is not editable in the Talent Profile.
Job Preferences	Section of the Talent Profile that presents the employee's work preferences. These preferences are defined by the employee and can later be used by managers to find successors according to preferences via the Advanced Search options.
Job Type	Job type preferred by the employee.
Languages	Sub-section of the Competencies section that lists language competencies.
Last Review Rating	Overall rating of the employee's last completed performance review.
Last Update	The date when the employee last made a change to their goal plan.
Last Used	Indication of the last time the particular competency was used, which can only be defined and edited by the employee. The display of this dimension in the Competencies section of the Talent Profile is based on a setting defined in the administration application. The rating can be edited if so configured in the administration application.
Location	Location of the work place of the employee, as defined in the employee's user account in SmartOrg.
Locations	Locations of interest, including country, state/province, region and city.

Name	Description
Manager	Name of the employee's direct manager, as defined in the employee's user account in SmartOrg.
Manager	The name of the manager who owns the review.
Manager's Rating	Rating given by the manager for the competency in the last focal review, that displays in the Talent Profile when the review is closed and the Update Talent Profile options is selected. The text value however is derived from the rating model associated to the specific behavioral competency. The display of this dimension in the Competencies section of the Talent Profile is based on a setting defined in the administration application. The rating can be edited if so configured in the administration application.
May we contact the supervisor?	Flag that indicates whether it is possible to communicate with the supervisor to get further information.
Metrics	Section of the Talent Profile that presents employee metrics. This section is only seen by managers for their direct reports.
Name	Name of the competency that can be added by the employee or drawn from the employee's last focal review when the Update Talent Profile option is selected.
New Salary	Amount of the new salary, that is the current salary plus the increase.
Number of Activities	The number of development activities in the employee's development plan.
Number of Career Scenarios	Number of career scenarios the employee has in their career plan.
Number of Succession Plans	This metric indicates the number of succession plan this person is part of.
Number of Successors	Number of successors included in the succession plan for the employee.
Number/ID	Course number or ID associated with the certification.
Organization	Name of the organization responsible for providing the certification.
Organization	Organization where the employee works, as defined in the employee's user account in SmartOrg.
Organizations	Organizations of interest, including company, section, department and division.
Other Certification	Field used to specify a certification that is not in the list provided in the Certification Selector.
Other Employer	Field used to specify an employer that is not in the list provided in the Employer Selector.
Other Institution	Field used to specify an education institution that is not in the list provided in the Institution Selector.
Other Job Function	Field used to specify a job function that is not in the list provided in the Job Field Selector.
Other Program	Field used to specify an education program that is not in the list provided in the Program Selector.
Overall Progress	The overall completion percentage for each of the goals in the employee's goal plan.
Phone	Phone number of the employee at their current position.
Potential	Metric that indicates the potential of an employee, that is editable by the manager and not visible to the employee.
Preferred Job	Preferred job fields of the employee, selected from those available within the organization. Includes category, function and specialty.
Preferred Location	Preferred locations of the employee, including country, state/province, region and city.
Preferred Organization	Preferred organizations of the employee, including company, section, department and division.

Name	Description
Proficiency	Level of expertise an employee has in regards to a particular competency. The display of this dimension in the Competencies section of the Talent Profile is based on a setting defined in the administration application. The rating can be edited if so configured in the administration application.
Program	Name of the education program. When adding a new education, the program must be selected from the Program Selector.
Promotability Readiness	Metric that indicates how much time is required for the employee to be ready for a promotion, that is editable by the manager and not visible to the employee.
Readiness	Value used to indicate when the employee will be ready to be placed into a job position in a Succession Plan. This value comes from the Succession Plan of the employee and is not editable in the Talent Profile.
Reassignment Candidate	Metric that indicates if the employee is available for reassignment, that is editable by the manager and not visible to the employee.
Replacement Name	When there is an interim replacement for the employee, this metric shows the name of the replacement.
Review Rating	Metric that indicates the review rating the employee received on the last closed performance review.
Review Rating	Overall review rating score given by the manager for the review. The value is based on the final score of the review, which uses the 'Review Rating' Metric Rating Model setting to determine the available values. It is formatted based on the Metric Rating Display setting.
Review Status	
Risk of Loss	Metric that indicates the probable risk level of losing the employee, that is editable by the manager and not visible to the employee.
Schedule	Work schedule preferred by the employee.
Show	Field that provides the ability to select the competency information type to be displayed. You can choose to display General information (such as Proficiency, Experience, Last Used, Interest) or Rating information (that being the Manager and/or the Employee's Rating).
Skills	Sub-section of the Competencies section that lists technical competencies.
Start Date	Date the education started.
Start Date	Date the job function started.
Status	Overall status of the employee's current goals.
Still in Position	Flag that indicates that the employee is still working in the related position. Most commonly, this flag is used when the end date is not specified.
Stock Grant	Number of stocks.
Supervisor's Email	Email of the supervisor for the related job function.
Supervisor's Name	Name of the supervisor for the related job function.
Supervisor's Phone	Phone number of the supervisor for the related job function.
Supervisor's Title	Title of the supervisor for the related job function.
Target Bonus	Amount and/or percentage of the bonus that was targeted.
Tasks and Achievements	Free-form text box indicating any other task and achievement.

Name	Description
Total Not-vested Stock	Total number of stocks that are not yet vested.
Willing to Relocate	Employee's willingness to move to a different location.
Willing to Travel	Percentage of time an employee is willing to travel for their job.
Work Experience	Section of the Talent Profile that presents information about the work experience of the employee.
Work Experience	Section of the Talent Profile that presents the employee's work experience.
Work Phone Number	Phone number of the employee at their current position.
Work Phone Number and Extension	Phone number and extension of the employee at their current position, in a single field.
Work Experience	Section of the Talent Profile that presents the employee's work experience.
Years in Industry	Number of years of experience in the same industry, for the current position.
Years in Industry	Number of years of experience in the same industry, for the current position. Same value as the one presented in the Job Preferences section.
Years in Management	Number of years of management experience.
Years in Management	Number of years of management experience. Same value as the one presented in the Job Preferences section.

## Deleting Rated Competencies

Typically employees or managers cannot delete a competency from the Talent Profile once it has been rated, but HR Administrators are able to do so. The correct user type permissions are required and certain administration settings must be enabled.

### Configuration

The table shows permissions for deleting a competency from the Talent Profile.

User Type Permission	
Name	Description
Performance > Employee Profile > View & Manage	High level view and manage permissions are required to be able to select and delete competencies in the Talent Profile.
Performance > Team Management > Access administration tools	This permission is required to indicate the user is an HR administrator.

These settings must be enabled.

Configuration > [Performance] Administration > [Talent Profile Management] Talent Profile Layout > Talent Profile Section - Competencies	
Name	Description
Remove competencies	This setting is required to display the Minus icon.

Configuration > [Performance] Administration > [Talent Profile Management] Talent Profile Layout > Talent Profile Section - Competencies	
Name	Description
Display competency section in Talent Profile	This setting is required for the Competencies section to be displayed in the Talent Profile.

## To Delete Rated Competencies from the Talent Profile

User must be an HR Admin with view/manage access to talent profiles.

User must have the Talent Profile Competency Configuration settings, **Remove Competencies** and **Display competency section in Talent Profile** enabled.

1. Access the Talent Profile of the employee.
2. Select **Competencies** from the menu.
3. Select the name of the competency to delete and click the Minus icon.

If a message is displayed, click **OK** to confirm deletion.

The competency is deleted from the talent profile and is also deleted from any development activities it is associated with.

## Showing Compensation Data in Performance

Compensation history data can be configured to display within Performance.

The talent model includes compensation data elements so that compensation data may be displayed within the Performance application. This compensation data can come from Compensation or from an external HRMS/ERP system.

The compensation history data is displayed according to metric configuration, availability, and user security access in the following areas:

- **Talent Profile** - Displays compensation history data.
- **Performance Snapshot Card** - Displays compensation data in the Compensation section of the snapshot card.
- **Talent Browser** - Displays salary, bonus, and stock information for employees.

When compensation history data is available, and the related metric has been configured to display, the following information is provided in Performance, when available:

- Employee's current salary
- Employee's salary increase, new salary and effective date
- Employee's bonus amount, bonus plan, target bonus amount and effective date
- Employee's stock grant amount, total non-vested stock and grant date

Compensation history is available from Compensation through an integration. If Compensation is activated in the zone and the integration is configured, the system will automatically transfer all compensation history data into SmartOrg on a daily basis. If Compensation is not activated, the client can use the standard integration tools to transfer the data from an outside ERP system.

## Configuration

The following permissions must be granted to individual users to view or manage the Compensation History Data feature in Performance.

User Type Permission	
Name	Location
View Compensation Data	Configuration > [SmartOrg] Administration > User Type > User Account > Compensation > Compensation > Compensation Data
Manage Compensation Data	Configuration > [SmartOrg] Administration > User Type > User Account > Compensation > Compensation > Compensation Data

Available Compensation Metrics	
Name	Location
Compensation - Current Salary	Configuration > [Performance] Administration > [Employee Management] Metrics Configuration
Compensation - Salary Increase	Configuration > [Performance] Administration > [Employee Management] Metrics Configuration
Compensation - Target Bonus	Configuration > [Performance] Administration > [Employee Management] Metrics Configuration
Compensation - Non-vested Stock	Configuration > [Performance] Administration > [Employee Management] Metrics Configuration

## Talent Master Profile

Using a single core person model to support Candidate and Employee Data, the Oracle Taleo Enterprise Edition application allows the transformation of candidates to employees. This is supported in concert with an organization's HRMS/ERP system, which will play an intermediary role in this process to allow the assignment of an Employee ID.

By using a single person model for all records, any updates by an organization's HRMS system are visible both in the candidate's file seen in Recruiting and from Performance. All data is shared from the same data source. This also means that if an employee updates his/her record from the Talent Profile in Performance by adding certifications or additional educational information, this information is also updated on that person's candidate record visible in Recruiting. The reverse is also true, if an employee updates his/her profile by applying to a newly opened internal position on a career site. These additions also serve to augment this candidate's employee profile.

## Multi-Language Display of Shared Profile Data

Users can select which language their shared candidate and employee profile data is displayed if multiple profiles in multiple languages exist. This allows Talent Users to continue to access and enrich their profiles as they move between having a Candidate Profile within Recruiting to having a Talent Profile within Performance Management.

The definition of an active profile is standardized between Recruiting and Performance to mean the last updated profile. This logic is shared between Recruiting's Candidate profile and Performance's Talent Profile and Career modules resulting in the common Talent User. There are three common profile data areas; Work Experience, Education and Certifications. All three common profile data areas will display the same language and will synchronize on data refresh

whenever the user switches the language in either Work Experience, Education or Certifications. After switching the language using the dropdown menu, only the content data from the matching profile version will refresh. The remaining labels stay within the context of the application login language.

The default dropdown value indicates the active profile. This dropdown can be changed, and the newly selected language will persist during the session. When logging out and entering a new session, the default language will revert back to the active profile's language. If the Talent User has only one profile, the language dropdown does not display.

### Snapshot Card

When the language is changed in the Talent Profile, that language is also displayed on the Snapshot card. The language cannot be changed on the Snapshot card itself, but a Tooltip with hover text is provided with the following message, "You can switch the profile language displayed from within the Talent Profile."

### Native Reporting

There is a Profile data set for Native Reporting under the Talent Profile Data Model domain to report on Work Experience, Education and Certifications for all employees' profiles. This data is available and reportable for all available profiles in all languages, not just the active profile.



**Note:** As a best business practice, employees and managers are encouraged to keep all profiles up to date now that they will all be exposed in the Talent Profile. Updates made to Work Experience, Education and Certifications in the Talent Profile, given the user has permissions to update, will be reflected in the corresponding Candidate Profile.

## Employee Photo Upload

Instead of having to use the Configuration module or Taleo Connect Client for uploading photos, employees can upload a photo for themselves.

### Larger Photo Image in the Talent Profile

A large size employee photo image (256 x 256 pixels) can be displayed in the Talent Profile's General section. The larger photo image is also used in the header section of Native Reports. Elsewhere in the system, such as on the Talent Card, the photo is resized to a smaller image (48 x 48 pixels).

At migration the system will not automatically display photos from implementations prior to Feature Pack 12C. By default the larger photo will be shown as a silhouette, as photos from earlier implementations are smaller in size. In this case employee photos will need to be re-imported in order to have them display on the General section.



**Note:** There are several ways to get the larger employee photo images to display on the General section:

- Manually update a photo within the user's General section.
- Update a photo through the user's SmartOrg account.
- Use the Taleo Connect Client (TCC) to batch load employee photos.

### Employee Upload of Photo Image

From the Talent Profile General section, an option is available to browse to a photo in your local network and upload it to Performance. You can upload .gif, .jpg, and .png files. In instances where a photo isn't a passport style photo, and you upload a portrait orientated photo, the system will attempt to crop the top part of the photo and display it, while with a landscape photo it will crop the center of the photo and display it.

## Configuration

Requires one Talent Profile setting and ensuring that the correct user type permissions are enabled.

Configuration > [Performance] Administration > [Talent Profile Management] > Talent Profile Properties	
Name	Description
<b>Allow Employee to Upload Photo</b>	This is required to have the <b>Change Photo</b> option available when you hover over an employee photo. Whether you can change your photo, or other employee's photos, depends on you user permissions.

Configuration > [SmartOrg] Administration	
Name	Description
<b>[Users] User Accounts Select a User Type and Account Employee Information section Edit</b>	An administrator can upload an employee photo from this setting.
<b>[Users] User Types Functional Domain=Performance Employee Profile Edit Permissions=Manage</b>	You can assign Manage access for different types of users, and this permission is required to see the <b>Change Photo</b> option and be able to upload a photo.

## To Upload an Employee Photo

You must have user type permissions for editing talent profiles, and talent profile configuration settings for uploading photos must be enabled.

1. Access the talent profile for the employee whose photo you want to change.
2. Hover your mouse over the photo and click the **Change Photo** popup.  
If you have accessibility features enabled, you will click the **Change Photo...** button beside the photo.
3. Browse to the photo you want to upload, select it and click **Open**.  
Supported file types are .gif, .jpg, and .png.

The photo is resized to 256 x 256 pixels by the system and displayed in the **General** section of the talent profile. Elsewhere in the system where employee photos are displayed, such as in the Talent Card, they are resized to a smaller image size, 48 x 48 pixels.

If you do not like the results of the employee photo upload, you should resize the image on a local machine to have equal width and length, and then re-upload it. You can also delete the photo, replacing it with a generic silhouette.

## Talent Snapshot

This provides the ability to view key employee information from different modules in the same place.

It is accessible via the Talent Snapshot icon throughout the system. This includes areas such as the Talent Browser, Network panel, Search results, Talent Pools, Succession Plans, and Performance Review list.

Employee management configuration settings for metrics, along with user type permissions, control access to Snapshot information.

The following metrics are displayed in the Talent Snapshot, all four of which are customizable:

- Potential
- Risk of Loss
- Impact of Loss
- Promotability Readiness

Selecting View Org Chart will display the person as the top node in the Talent Browser.

For information on the details for each module, see the corresponding sections in the Help Center or Oracle Taleo Enterprise Edition User Guide for Performance.

The Talent Snapshot summary provides information on the following:

Talent Snapshot Contents (except Performance Card)	
Section	Included Information
Employee Information	Manager, Current Position, Direct Reports, Work Experience, Education. When available, the first five direct reports, first work experience entry, and first education entry are displayed automatically.
Goal Plan	Overall goal plan (total goals, goals aligned to manager, overdue goals, overall progress, approval status, last updated date), Employee goals (name, alignment, progress, due date).
Development Plan	Overall dev plan (total activities, overdue and completed activities, approval status, last updated date), development activities (name, progress, due date).
Succession Plan	Overall succession plan (total number of successors, total number of nominations, bench strength, successors list, approved, last updated date). This section also includes Employee metrics (Potential, Risk of Loss, Impact of Loss, Promotability Readiness), Position metrics (Critical Position), and Succession metrics (Interim Replacement and Number of Succession Plans). A pop up with detailed Succession Plan information displays if the Number of Succession Plans is hovered over. The metrics can be displayed even if no succession plan is available.
Career Plan	Overall career plan (current job, scenario steps, gap analysis for each step indicating competencies required for the job). You can switch between scenarios and each one can display the current job and the first two steps of the plan.

### Performance Snapshot Card

The Performance snapshot card contains data on the employee's current salary and compa-ratio, along with data on the last three closed focal performance reviews and compensation periods. The data that is displayed is impacted by your user type permissions and whether you have compensation data.

At a minimum, the Performance Review Ratings display one value per review period for the Overall score of the review. It may also contain Goal section and Competency section scores depending on your review configuration. The most recent review values displayed are the same as those found in the Metrics section of the Talent Profile. For more details on how ratings scores are derived and displayed, see the *Oracle Taleo Enterprise Edition Performance Review Ratings Orientation Guide*.

Compensation data can be brought into Performance via an integration with Compensation or by importing data from a third-party system using Taleo Connect Client (TCC). Regardless of which, batch data import jobs should be scheduled regularly to ensure the most up to date compensation data is displayed. For integration details, see the *Compensation and Performance Integration Guide*.

While the compensation data values available to both the snapshot and talent profile are the same, they are displayed differently. The talent profile only displays information when it is available and only displays the most recent individual values. The snapshot card displays *NA* when there is no information and displays values based on yearly totals and availability.



**Note:** Performance and compensation data are independent of each other, therefore it is possible the periods displayed for each will differ.

Performance Card Contents	
Subject	Description
Current Salary	This value is taken from the compensation history table. Depending on when the compensation data was last updated, it is possible this is not your actual current salary.
Compa-ratio	This value is taken from the compensation history table. Depending on when the compensation data was last updated, it is possible this is not your actual current compa-ratio.
Performance Review Ratings	
Overall	Displays the Overall review rating based on the <i>Employee - Review Rating</i> value kept in the historical review table for the indicated review period. All scores are for completed and closed review periods. No active scores are included.
Goals	Displays the rating for the Goals section of the review. This is based on the <i>Employee - Goal Rating</i> value kept in the historical review table for the indicated review period. All scores are for completed and closed review periods. No active scores are included.
Competencies	Displays the rating for the Competencies section of the review. This is based on the <i>Employee - Competency Rating</i> value kept in the historical review table for the indicated review period. All scores are for completed and closed review periods. No active scores are included.
Review Comments	When you select an overall rating, review comments associated with it are displayed here. If no comments exist, the score is not a clickable link.
Compensation History	
Salary Increase	These values come from the compensation salary history table associated with the effective date displayed on the card. The <i>Oracle Taleo Enterprise Edition SmartOrg Data Dictionary</i> provides details on compensation elements.
Bonus Award	These values come from the compensation bonus history table associated with the effective date displayed on the card. As currencies are displayed for both this value and <i>Salary Increase</i> and multiple currencies are not supported within the same aggregated period, you should use the same currency whenever possible.
Stock Granted	These values come from the compensation stock history table associated with the effective date displayed on the card.

## Configuration

There are no specific Taleo Performance configuration requirements for this feature; however, you must have the following **View** user type permissions and configuration settings to display the data. *There is no information available* messages are displayed to users without appropriate permissions.

If Taleo Compensation is activated in the zone, the integration should have been configured to automatically transfer compensation history data on a regular basis. If Compensation is not activated, the client can use Taleo Connect Client (TCC) to transfer compensation data from an outside ERP system.

User Type Permission	
Snapshot Section	Required Permission
Employee Information	<ul style="list-style-type: none"> <li>Employee Profile - required to display Work Experience and Education details. Manager, Current Position, and Direct Reports are always displayed.</li> </ul>
Goal Plan	<ul style="list-style-type: none"> <li>Goal Plans - required to display the entire section.</li> </ul>
Development Plan	<ul style="list-style-type: none"> <li>Development Plans - required to display the entire section.</li> </ul>
Succession Plan	<ul style="list-style-type: none"> <li>Succession Plans - required to display plan details.</li> <li>Employee Metrics - required to display metrics.</li> </ul>
Career Plan	<ul style="list-style-type: none"> <li>Career Plans - required to display the entire section.</li> </ul>
Performance Review Ratings	<ul style="list-style-type: none"> <li>[Performance] Performance Reviews - required to display the entire Performance section.</li> </ul>
Compensation History	<ul style="list-style-type: none"> <li>[Compensation] Compensation Data - required to display the entire Compensation section and also the current salary and compa-ratio data.</li> </ul>

Configuration > [Performance] Administration > [Employee Management]	
Settings	Description
Metrics Configuration	Affects what is displayed in the Metrics section of the Succession Plan snapshot card.

## To view an Employee's Snapshot

You must have user type permissions for the specific modules to see the information associated with them. If you do not have the permissions, the sections are not displayed.

1. Click the Talent Snapshot icon.

The Employee Information section is displayed. Click the Double Right Arrow icon to change sections. Click **View Org Chart** to see the employee displayed as the top node in the Talent Browser. Click the Down Arrow icon to display the Go To menu.

## Attachments

Files can be attached to Performance Reviews, Goal Plans, and the Talent Profile. This enables employees to include documents that are not kept in Performance, in support of their achievements and progress for reviews and plans, such as projects plans, implementation scorecards, or client feedback. Native reporting output files can also be attached

to reporting correspondence. "Attachment" settings are globally applied to all types of attachments, including report attachments used in native reporting correspondence.-

The files are associated with the highest level object, such as the overall goal plan itself and not a specific employee goal. Attachments can be viewed by anyone who has view access to the object (goal plan, review, talent profile), while manage access is required to attach files. Only employees can attach files to their goal plans and performance reviews. Like other events, adding and removing attachments is included in the object's history.

As a basic service you can attach up to ten files to an object, with a maximum file size of 1mb, depending on system configuration. If you have already reached your maximum number of attachments you will need to delete a file before a new one can be uploaded. Once a file has been attached it can be updated, but you must save the file locally, make your changes, and then re-upload it. A wide range of file types are supported, but those available to you will depend on your organization's implementation.



**Note:** If the file restrictions change over time, it is possible some existing attachments will be for file types and file sizes that are no longer allowed.

Supported File Types	
Type (Extension)	Type (Extension)
Word (.doc, .docx)	Text (.txt)
HTML page (.htm)	Word Perfect (.wpd)
HTML page (.html)	Excel (.xls, .xlsx)
Portable Document Format (.pdf)	Zip (.zip)
Rich Text Format (.rtf)	OpenOffice Writer (.odt)

## Configuration

Clients must request activation of this feature. This feature should not be activated until Oracle has analyzed the impact it may have on the client's system.

Apart from **Attachment Enabled**, the General Configuration settings do not need to be configured unless you want to change the default values for the list of supported files or the size and number of files that can be attached.

Configuration > [Performance] Settings	
Name	Description
Attachment Enabled	Protected setting. Oracle Support must enable this setting. By default this setting is disabled. When enabled, attachment functionality is available for goal plans, performance reviews, and talent profiles, with the constraints of the other attachment settings applied.

Configuration > [General Configuration] Settings	
Name	Description
Attachment Format Filter	Public setting. By default all supported file types can be uploaded. You can add and remove file types from the list as required.
Attachment File Maximum Number	Protected setting. The maximum number of files that a user can attach to an object is 10.
Attachment File Maximum Size	Protected setting. The maximum size for each uploaded file is 1 MB.
Block Macros in Attachments	Public setting. The system will scan the attachments for macros. Files containing macros will not be updated.

After configuring the global settings, specific attachment options must be enabled for goal plans and the talent profile. Reviews also require the **Performance Reviews > Manage - If this user is one of the authors** user type permission.

Configuration > [Performance] Administration	
Name	Location
Allow File Attachments	<ul style="list-style-type: none"> <li>• [Goal Management] Goal Plan Templates &gt; Goal Plan Name &gt; [Properties]</li> <li>• [Employee Management] Talent Profile Section Configuration &gt; [Properties]</li> <li>• [Performance Reviews] Review Cycles &gt; Review Cycle Name &gt; [Review Requests] Request Name &gt; [Settings]</li> </ul>

## To Attach Files to the Talent Profile

You must be the owner of the object to which you are attaching files.

### [Navigation bar] Profile

1. Scroll to the **Attachments** section and click **Add**.
2. Click **Browse**, select the file you want to upload and then click **OK**.

The dialog lists the allowed file types and you can only select from them. You should enter a comment to help identify the purpose of the file, especially if it is not clear from the filename.

The file is added to the **Attachments** section and includes the filename, comments, who it was attached by, and the date it was attached.

You can view the file by clicking the filename and delete it by clicking the Right Arrow icon and selecting **Delete**.

## To Attach Files to Goal Plans and Reviews

Only employees can attach files to their plans and reviews. Managers cannot attach files.

1. Go to the Goal Plan or Performance Review and click the Tools icon to expand supporting tools.
2. Select the **Attachments** ribbon and click **Add**.
3. Click **Browse**, select the file you want to upload and then click **OK**.

The dialog lists the allowed file types and you can only select from them. You should enter a comment to help identify the purpose of the file, especially if it is not clear from the filename.

The file is added to the **Attachments** section and includes the filename, comments (which you can mouse over to display them in their entirety), who it was attached by, and the date it was attached. The file is attached at the goal plan level — not individual goals — and at the review level — not individual review items.

You can view the file by clicking the filename and delete it by clicking the Down Arrow icon and selecting **Delete**.

## Automatic Reminders

The configuration capability to set up automatic reminders allows users to set up reminders for each review action within a given workflow defined for performance reviews. System Administrators can set review process reminders at any or all of the individual review step/action levels. Whereas notifications are triggered by workflow events and are static, reminders are configurable and provide the ability to send users emails to promote task accomplishment. The reminders contain deep linking and allow the employees to go directly into their performance reviews from within the email.

Example. The performance review cycle for the current year has been configured and assigned to all employees within an organization. Notification emails have been sent to all the employees once the writing self-assessment tasks have been assigned. Reminder emails have been configured at a bi-weekly occurrence starting from the date the self-assessment task have been assigned, with reminders ceasing once the tasks have been completed. Julia receives an email notification stating that her review self-assessment is due by March 31, 2013. Julia clicks the link contained within the reminder email that brings her directly to her review self-assessment. She works for a couple hours on her self-assessment, but then needs to move on to another task. Julia gets brought onto a new project and completely forgets about completing her performance review. Because the reminder emails have been configured to be sent bi-weekly, Julia receives an email reminder again containing the link to her performance review. She completes her self-assessment just in time for her one-on-one with her manager. Because Julia has completed her tasks, the email reminders cease.



**Note:** In the case that a review is transferred, the review reminders will be sent out to the new employee and conversely the reminders to the previous employees will cease. When a review request or review cycle is duplicated, all the information is copied, which includes notifications and reminders.



**Note:** One of the potential impacts is the large number of emails potentially generated by reminders; one email per task is sent. Until we implement summary emails, managers with large spans of control could get large volumes of email if a reminder is configured for those tasks like "Write Employee Review." To provide a remedy, a warning message is provided in the Administration pages. Also, the System Administrators are able to deactivate the reminder if the number of emails becomes cumbersome.

## Configuration

For more information on setting up and configuring automatic notifications, refer to the *Oracle Taleo Enterprise Edition Administration Guide for Performance, "Correspondence and Feedback Administration"*.

### Prerequisites

- Performance has been set up with Performance Reviews.
- The performance review cycle for the current year has been configured and assigned to all employees.
- Notification emails have been sent to all the employees and employee tasks have been assigned.

## Summary Emails

Multiple task notifications can now be aggregated into a single email.

Summary emails provide Managers and HR Administrators with a single email that includes deep links to their pending tasks. Instead of receiving a single email for each pending task reminder, a summary email can now be sent that categorizes and quantifies tasks within the Performance Management module. Each of these categories contain a link that takes the user to the login page and then directly to the relevant module to complete the task. The summary emails are automatically updated as the tasks are completed. For example, if a notification is configured to get sent weekly and a Manager completes 7 out of 9 Review tasks, the summary email sent the following week will only list 2 pending Review tasks. If a user has no tasks pending, the summary email will not get sent.

Manager and HR Admin task types that are supported:

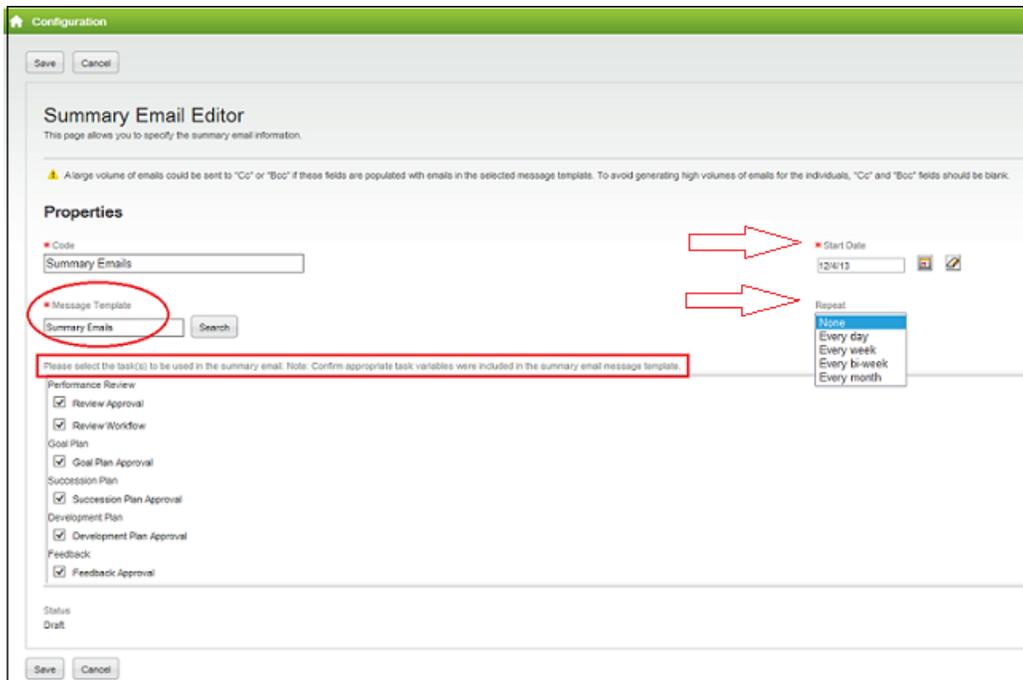
- Review Approval
- Review Workflow
- Goal Plan Approval
- Succession Plan Approval
- Development Plan Approval
- Feedback Approval



**Note:** There are other task types available for non-Managers and non-HR Administrators, however, summary emails support only Manager and HR Admin task types. All other employees will receive standard notification emails, not summary emails.

As with existing notification functionality, System Administrators configure the notifications by selecting/creating the message template, determining which tasks should be triggered, and how often the email will be sent. First, Administrators create or select the message template to be used in the summary email. The *Standard notification for summary email* template is available for summary emails along with the *Available Variables* to support summary emails.

The appropriate variables must be selected in this template in order to select the corresponding tasks in the summary email in the next step. For example, if you want to include Review Approval tasks in the summary email, the {Summary-Email.PendingReviewApprovalTaskLink} variable must be selected in the template. Next, the parameters of the email are configured in the Global Configuration *Summary Email Editor* which is found in the Performance Management Configuration > Global Configurations > Summary Emails.



In the example above, all 6 available Summary Email Task Types have been selected. Each time a summary email reminder goes out, it will aggregate each of these task types and include the links to take users directly to the incomplete tasks. At this time 6 is the maximum number of separate summary emails that may be activated at one time. Each task type can be used only once in summary emails. For example, if Succession Plan Approval is selected for use on 1 summary email, then it is not available for use in another summary email; they are mutually exclusive. This tends to be sufficient as most tasks are cycle dependent.

The following image is an example of a summary email.

**Summary Email for Julia Savard**

Human Resources [hr-v13cs1@invalidemail.com]

Sent: Sun 10/6/2013 12:01 AM

To: Lan Pham

---

Message |  this\_message\_in\_html.html (1 KB)

---

Dear Julia Savard,

Please review the following outstanding task list and take necessary action(s). You can click on the link(s) below and it will take you to your task page.

- Review Workflow task(s): [6](#)
- Review Approval task(s): [1](#)
- Feedback Approval task(s): 0
- Development Approval task(s): N/A
- Goal Plan Approval task(s): N/A
- Succession Plan Approval task(s): N/A

For more detailed information on setting up and configuring notifications, including Summary Emails, please refer to the *Oracle Taleo Enterprise Edition Administration Guide for Performance, "Correspondence and Feedback Administration"* Release 13C or later.

## Configuration

One global configuration setting to support summary emails is available.

User Type Permission	
Name	Location
Summary Emails	Performance > Configuration > [Performance] > Administration > [Global Configurations] > Summary Emails

## Flexibility for Message Sensitivity Level

Each notification and email message sent by Oracle Taleo Enterprise Edition can be set to a specific sensitivity level. This feature applies to messages sent from the Recruiting Center, Evaluation Management, Onboarding (Transitions), Legacy Onboarding, Performance, and SmartOrg.

Each notification and email message can have its own sensitivity level. A "Sensitivity" drop-down menu was added to the message template editor. A system administrator could, for example, configure specific messages as being Private (such as messages sent to internal candidates) while keeping a Normal sensitivity level on other messages.

## Configuration

A global setting controls the sensitivity level of messages sent by Oracle Taleo Enterprise Edition products. This setting provides the sensitivity levels supported by Microsoft Outlook (Confidential, Normal, Personal, Private).

Setting	Description	Default Value	Location
Mail Sensitivity	<p>Sensitivity of email messages sent from the system.</p> <p>Possible values are:</p> <ul style="list-style-type: none"> <li>• Confidential</li> <li>• Normal</li> <li>• Personal</li> <li>• Private</li> </ul>	Normal	Configuration > [General Configuration] Settings

System administrators can now override this global setting by configuring the sensitivity level of specific email messages. This is done via the message template editor, by using the new "Sensitivity" drop-down menu.

Five sensitivity levels are available:

- Default
- Normal
- Private
- Personal
- Confidential

Selecting the "Default" sensitivity level means that email messages sent using this message template will use the sensitivity level defined in the "Mail Sensitivity" global setting.

## Comment Field Capabilities

The Comment field capabilities are standardized across the Review, Goal, Business Goal, Feedback and Development modules.

Whether a user is completing their Goal Plan or Performance Review, or a number of other tasks, they are encouraged to provide detailed comments throughout different steps in the processes. When entering a comment, the comment pop-up window displays which provides the following capabilities:

- Rich text formatting
- Spell check
- Character limit increase (ranging from 200-4000)
- Character number limit countdown
- Resizing

# Talent Browser

The talent browser provides managers and executives with a flexible, real-time view into their organization.

Some of the talent browser's functionality includes:

- viewing multiple levels with panning, zooming and a mini-organization chart map, for easy navigation
- using the scope options, for viewing multiple levels or just direct reports
- drilling down into the org chart layers, for focusing on specific business units and groups
- filtering by general information, customizable employee metrics, and goal association, for highlighting employees that meet specific criteria
- accessing an employee's snapshot, to have instant access to their key data
- organizational summary card, providing a roll-up view into the metrics for an entire business unit

## Customizable Metrics Use in the Talent Browser

The following metrics are displayed in the Talent Browser when Metrics is selected from the General selector, all three of which are customizable:

- Potential
- Promotability Readiness
- Risk of Loss

## Configuration

By default, all users should have access to the Talent Browser.

Configuration > [Performance] Settings	
Name	Description
Maximum Number of Nodes in the Talent Browser	Controls how many employee cards can be displayed at one time, between 50 and 200. The default is 100.

User Type Permission	
Name	Description
Performance > Team Management > Access...	Controls access to <b>More Actions &gt; Team Summary</b> . This prevents employees from seeing organizational information for levels above their place in the organizational hierarchy.

# Using the Talent Browser

You can use the talent browser features to focus in on specific employees or parts of your organization.

- *Filtering the Talent Browser* - in a large organization, where you have many direct and indirect reports, it can be unrealistic to quickly identify key employees and some degree of filtering should be applied.
- *Setting the Scope* - enables you to limit the displayed employees to direct reports or an additional level.
- *Navigating the Talent Browser* - with filter criteria applied you then have multiple options available for viewing and moving around the talent browser.
- *Viewing employee information* - employee and business unit information is accessible from the talent browser.
- *Working with Requisitions and Positions* - you can view and access your open requisitions and vacant positions directly from the talent browser.
- *Actions from the Employee Card* - you can use the Go to menu on an employee card to initiate and complete tasks.

## Filtering the Talent Browser

Filters are important for focusing your view when you have oversight into a large workforce.

Managers can use filters to build talent-related queries and see the results in the talent browser. Those cards that match the filter criteria will be highlighted. Filters are logically grouped into sections and each section can be expanded or collapsed.

Filter queries apply AND logic, not OR. For instance, if a manager chooses Potential =High and Risk of Loss=High, it will highlight those employee cards that match both criteria. If someone is Medium Potential with High Risk of Loss, their card is not highlighted.

## To Filter the Talent Browser

**Performance > [Navigation bar] > Talent Browser button**

1. Select the Right Arrow icon beside a filter section to expand it.
2. Set the filters as required.
3. Click the Refresh icon and the employees that match the filters are highlighted in the talent browser.

To reset the filters, click the Eraser icon.

Matching employee cards are shaded. For matching cards that are not in the current view, you can see which are shaded via the mini-organization chart.

## Talent Browser Filters List

In addition to the standard filters, the Employee Custom Metrics section will display any configured custom metrics.

Filter	Description	Section
Review Cycle	This includes a set list of review cycles.	Performance Reviews
Review Request	The review request is dependent on the review cycle.	Performance Reviews
Manager	The direct manager of the employee. If <b>Include All Reports</b> is selected then all indirect reports are also included.	Employees

Filter	Description	Section
Organization	The business unit the employee is associated with, as indicated by the Organization field in the Talent Profile.	Employees
Location	Where the employee works, as indicated by the Location field in the Talent Profile.	Employees
Job Field	Relates to the Job Preferences > Job Fields section in the Talent Profile.	Employees
Job Level	This value is associated with the employee's job role.	Employees
Willing to Travel	This filter checks if the employee has indicated they are willing to travel in the Job Preferences section in the Talent Profile. The filter only checks if the value is a zero or greater, so an employee willing to travel 5% of the time is highlighted to the same degree as an employee willing to travel 25% of the time.	Employees
Willing to Relocate	This relates to the Job Preferences setting of the same name.	Employees
Interest in International Assignment	This relates to the Job Preferences setting of the same name.	Employees
Competencies	Any one competency in the system can be selected as filter criteria.	Employees
Critical Position	This checks whether the employee's position has been marked as critical.	Employee Metrics
Risk of Loss	This checks whether the employee has been identified as potentially wanting to leave the company and the filter can be set for medium or high risk of loss.	Employee Metrics
Potential	This checks whether the employee has been identified as having potential and the filter can be set for medium or high potential employees.	Employee Metrics
Readiness for Promotion	Readiness for promotion is indicated by a range months and the filter enables you to select a specific number of months.	Employee Metrics
Review Rating	This relates to the Metrics > Employee > Review Rating value in the Talent Profile.	Employee Metrics
Goal Rating	This indicates the completeness of the employees current goal plan. This relates to the Metrics > Employee > Goal Rating value in the Talent Profile.	Employee Metrics
Competency Rating	This relates to the Metrics > Employee > Competency Rating value in the Talent Profile.	Employee Metrics
Years in Management	Number of years of management experience.	Employee Metrics
Years in Industry	Number of years in the same industry as the current position.	Employee Metrics
Goal Overall Progress	Slider is used to select the progress percentages you want to search between. This searches for active goal plans for the current business period. This relates to the Metrics > Goal > Overall Progress value in the Talent Profile.	Employee Metrics
Development Overall Progress	Slider is used to select the progress percentages you want to search between.	Development
Has development plan	Checks if the employee has a development plan. This does not need to be selected to use the Overall Progress filter.	Development

Filter	Description	Section
Business Period	The time frame in which a goal should be completed. This option limits the employee goals available to those associated with the business period and must be selected to enable the employee goals filter. On it' own this cannot be used as a filter.	Goals
Employee Goals	The goals available are those of the logged in user. Changing the employee at the top of the tree does not impact which goals are available. Filtering on employee goals highlights employees who have this goal or are aligned to it.	Goals

## Setting the Scope

Scope determines the level at which the talent browser is viewed and you can choose between displaying direct reports, direct reports plus an additional level, or the entire organization.

When viewing direct reports, you see your own employee card at the top with all direct reports below it. If you choose to view all reports, the entire organization is displayed in the talent browser. Initially the scope is applied to the logged in user, but if you drill down, the scope is applied to that employee.

For example if scope is set to direct reports, in your initial view you see yourself at the top, along with only your direct reports. If you select one of your direct reports, that direct report becomes the top level of the talent browser and only their direct reports are displayed below them.



**Note:** Scope must be set at **Direct Reports** for delegated employees to be displayed and to use the **Show Openings** option.

## To Set the Scope of the Talent Browser

**Performance > [Navigation bar] > Talent Browser button**

1. From the middle toolbar option, select whether to view **All Reports**, **Direct Reports**, or **Directs Reports + One Level** for the currently selected user.

The talent browser is updated to display the appropriate level and card details information.

## Navigating the Talent Browser

The talent browser provides multiple ways to navigate to the employees you want to view:

- zoom and unzoom by using available GUI options or your mouse wheel
- drag and panning around the talent browser using a mouse
- the mini-organization chart, which can be used for panning or for orientating yourself in a large organization
- refocus button to return you to the default view, based on the scope and filter criteria
- Management Bar provides breadcrumbs to show where the person who is currently the top node in the Talent Browser sits within the organization. The breadcrumbs can be used to change who you are viewing as the top node, by moving either vertically (your superiors) or horizontally (your immediate superior's direct reports and your colleagues). While you can view anyone in your organization via the breadcrumbs you can only see details beyond their manager, current position, and direct reports, if you have the required user permissions.



**Note:** The talent browser can display a maximum of 200 employees and will render complete levels until it hits the threshold of 200. It will not display part of a level. For example, if half-way through the fourth level 200 employees is reached, the org chart will display three levels and those with reports underneath them will have a number on the bottom of their card indicating the remaining employees. The minimum value is 50 and the system default is 100 employees.

## To Navigate the Talent Browser

### Performance > [Navigation bar] > Talent Browser button

1. To change the zoom level, click the enclosed Plus icon or the enclosed Minus icon, use the mouse wheel, or click the appropriate gray Minus icon icon to go directly to that level of the org chart.

The current level is indicated by the blue Minus icon icon.

2. To drag the org chart, click and hold the mouse button, which displays the Hand icon.

If you want to reset the talent browser, click the enclosed X icon and it returns to the top level.

3. To view superiors and their direct reports, you can click their name in the Management Bar breadcrumbs.

If you select one of the employees, they assume the top level in the Talent Browser.

4. To use the mini-organization chart map, click the Diagonal-Up-Left Arrow icon and click and hold the mouse button to drag the org chart.

The Multi-Directional Plus icon cursor indicates you are within the map and you can click the Diagonal-Lower-Right Arrow icon to close the map view. Hovering over the bottom right corner displays the resize icon Diagonal 2-Way Directional Arrow icon, you can subsequently click the mouse and use it to change the zoom level.

5. When available, click the number at the bottom of an employee's card to make that person the top of the org chart and to display their direct reports and subsequently click the Up Arrow icon to move one level back up the org chart.

You can also click the Up Arrow icon to make that person the top of the org chart and view their direct and indirect reports, when they are not already the top node in the org chart.

## Viewing Employee Information

The talent browser includes talent card information, a team summary of the employees in the org chart, and also enables you to access a specific employee's details.

The team summary provides information from the perspective of the current manager at the top of the org chart. The information is useful for gaining an at-a-glance look into the health of a part of the company. It displays totals for all of the employees under the manager, including the manager. Drilling down to lower-level managers will display only their specific team.



**Note:** You cannot access team summary information for business units alongside or above your own. In these instances the option is not displayed.

The toolbar — which displays General by default — can be used to select which employee details are displayed in the employee talent card. This includes info such as, goal progress, succession planning and employee metrics. The employee cards will display critical position and matrix management icons. From the employee's card you can go to their specific module information.

## To View Employee Information

**Team Management > Access** user type permission to display Team Summary option

## Performance > [Navigation bar] > Talent Browser button

1. Click the left toolbar button to select which talent card details to display in the talent browser.  
Within each level, the employees are sorted by last name.
2. Click **Team Summary** to display the summary information for all of the organization that sits below the manager currently displayed at the top of the org chart.  
The information that can be displayed is fixed, so even if your organization does not use a certain module, its section will still be displayed.
3. Click the Talent Snapshot icon on the performance card to display the snapshot, which provides key employee data.
4. To then go to an employee's specific module or complete an action, click the Down Arrow icon on the performance card and select the required option.

## Working with Requisitions and Positions

If you are a manager with open requisitions and vacant positions, you can access them from the Talent Browser.

If Performance is integrated with Recruiting, you can view requisitions you are an owner of and create new requisitions. Only requisitions for the logged in user can be accessed. For instance, you cannot select one of your direct reports and view their requisitions. When you create a new requisition you are taken to Recruiting.

Unlike requisitions, you can view open positions for your reports, along with your own.



**Note:** You must have scope set to **Direct Reports** to be able to view open requisitions and positions.

## To View Your Open Requisitions

You must have the required access to Recruiting.

You must have scope set at **Direct Reports**.

The requisition is open and you are an owner.

## Performance > [Navigation bar] > Talent Browser button

1. Select **Show Openings**.  
Your open requisitions are listed, displaying the title, ID, recruiter, open date, total candidates, and total ACE candidates.
2. Click the title to display the requisition or click the number of total candidates to display the candidates list.  
You are taken to Recruiting.
3. From Recruiting, select the House icon and select **Performance** to return to Performance.

## To Create a Requisition

You must have the required access to Recruiting.

## Performance > [Navigation bar] > Talent Browser button

1. Select **More Actions > Create Requisition** and the Requisition Wizard is displayed.  
You are taken to Recruiting to create the requisition. To ensure the requisition will be included in your Talent Browser open requisition list you must be an Owner. For details on creating a requisition, see Requisition Management in the Recruiting User Guide.
2. From Recruiting, select the House icon and select **Performance** to return to Performance.

## To View Vacant Positions

You must have the scope set at **Direct Reports** and there must be vacant positions.

**Performance > [Navigation bar] > Talent Browser button**

**1. Select Show Openings.**

The vacant positions for the person currently at the top node of the org chart are displayed.

**2. Click the Down Arrow icon and select View job profile.**

The position profile is displayed, including the description, competencies, and certification information.

**3. Select the Up Arrow icon to return to the Talent Browser or select [Module] Succession Plan to view plan details.**

## Managing Employees from the Employee Card

You can use the options on the employee card to initiate and complete tasks.

Depending on user permissions and the modules you have activated for your system, you can initiate the following actions from the employee card:

- **Snapshot** - From the snapshot you can see general employee information: *Snapshot*.
- **Team management** - This provides self-service features for making employee changes and maintaining employee-manager relationships: *Team Management*.
- **Request mentoring** - A mentor is assigned when a manager requests a mentor for one of his reports, which automatically establishes the mentoring relationship between the selected mentor and mentee: *To Assign a Mentor*.
- **Sending feedback** - General feedback is not related to any specific context and can be sent without having received a request for it: *To Provide General Feedback*.

## Talent Search

Talent Search provides a consistent, user-focused, robust method for finding employees and candidates. It consists of a persistent keyword search box for keyword searches and an advanced search, which combines keywords and employee parameters. Faceted search enhances the existing search capabilities of Performance providing users with dynamic and refined search results. Facets guide the user through a search providing continuous available search options and results.



**Note:** When customizable employee metrics are made inactive they are not searchable; only active values show up in facets.

## Using Talent Search

You can use Talent Search to find employees and candidates, either via a centralized search or from within modules, and add them to succession plans, talent pools, and requisitions.

- *Searching for Talent* - Using keyword search and advanced search to find people.

- *Understanding Search Behavior* - Facets guide users through a search providing continuous available search options and results.
- *Adding Employees to Modules* - Adding people from search result lists to plans and pools.
- *Searching in Context* - Searching from within succession plans and talent pools.
- *Understanding Keyword Boolean Operators* - To search effectively, it is important to understand the behavior of boolean operators.

## Searching for Talent

Searching for talent involves either a keyword search or an advanced search.

A keyword search enables you to find employees by entering keywords that search through fields associated with employees, such as name, address, employee number, or job title. If you subsequently select **More search options** you are taken to advanced search. From the search results page you can access an employee's Talent Profile, Goal Plan, or other module used in your system. Employee search results are presented as facets, providing dynamic and refined search results that guide users through a search providing continuous available search options and results.



**Note:** You can also use the **Go To** menu to view an employee as the top node in the Talent Browser. This is useful for HR Administrator and Support users who may be outside of the hierarchy they are trying to view.

Running an advanced search expands on the same keyword search, by enabling you to add employee metrics to the search criteria. You can also choose whether to search for employees or candidates; however, facets are only available for employee searches. From the Advanced Search page you can customize which fields and competencies are to be used as search criteria. People with the Employee Status of *Former Employee* are excluded from search results.

## To run a keyword search

1. Enter keywords in the search box and click the Magnifying Glass icon.  
Matching employees are displayed in the Search Results page. To search for candidates you must click **More search options** or **Advanced Search** and run an advanced search.
2. You can select multiple employees to display the **Actions** menu or click the Right Arrow icon to display the **Go To** menu for that employee.

You can now add employees to modules or view their details.

From the Search Results page you can click **More search options** to go to the Advanced Search page. You can then select **Clear Entries** to remove previous search criteria and **Add or Remove Fields** to customize the available search criteria.

## To run an advanced search

1. Click **Advanced Search**.
2. Select whether you want to search for employees or candidates.  
This changes the available search criteria, as not all search fields are applicable to candidates.
3. If you want to change the available search criteria, click **Add or Remove Fields** to select which fields can be used for the advanced search.  
While you can select which specific standard fields to include, with user defined fields you can only select the entire group. The search criteria available is affected by your employee profile and employee metrics user permissions.
4. Enter keywords.

This is the same as those available with a keyword search.

5. Enter values for the custom search criteria.
6. Click **Search** and matching people are displayed on the Search Results page.

You can now add employees to modules or view their details. Selecting multiple people displays the **Actions** option.

From the Candidate Search Results page you can click **Modify Search** to return to the Advanced Search page and change your existing criteria. From the Employee Search Results page you can click **More search options** to return to the Advanced Search page and change your existing criteria. You can then select **Clear Entries** to remove previous search criteria.

## Understanding Search Behavior

The Talent Search features include:

- Extension of the Competency facet to include Manager Competency Rating sub-facet; ability for managers to view employee's competency ratings.
- Intuitive path to navigate back to the search results page.
- Extended functionality of the keyword search that provides search suggestions while entering a keyword.
- Ability to search for a range of values.

### Competency Manager Rating

The thought behind the Competency Manager Rating facet is that all users should have the ability to see that someone possesses a particular competency, but only users with the appropriate security permissions should be able to view the *Manager ratings* for that competency. When permitted users select one or more competencies, a list of Manager Competency Ratings displays for each competency selected as sub-facets. The full rating scale displays for each competency and each scale may be different depending on customer configuration. The default display lists the top 10 competencies. If more than 10 are needed, users can add more by selecting **Add**.



**Note:** Because Competency is a public facet and Competency Rating is a secure facet, the total count for the Competency Rating facet may not add up to the count displayed for the corresponding Competency facet. Competency Name displays with public counts; Competency Rating displays with secure counts.

### Return to Search Results

Performance provides an intuitive link to guide users back to their Search Results page. By selecting **Back to Search Results** users are taken back to the Search Results page with the entered keyword, all selected facet values and advanced search criteria preserved. Users may return from 1 level deep into navigation. For example, if a user navigated to the Talent Profile of employee found in the initial search, they can select **Back to Search Results** and be taken back to the Search Results page. However, if from the Talent Profile users then navigated to the Career Plan, the return path will be lost; this is indicated by the absence of the **Back to Search Results** link in the ribbon of the application.

Users may return to their original search results from the following pages:

- Talent Profile
- Goal Plan
- Performance Review
- Career Plan
- Development Plan

- Talent Browser

## Suggested Input

The functionality of the keyword search has been extended to provide users search suggestions as they enter text. The suggestion input is triggered after users enter at least 3 characters. The 5 most popular matches are displayed as a list that users may select from, or ignore by continuing to type.



**Note:** Suggestions are based on keywords. This is why entering "Mic" may bring up both *Michigan* and *Michelle*.

## Range of Values Search

To allow users to broaden search capabilities when using numeric and date fields in Advanced Search criteria, a range of values can now be specified within User - Defined fields. For example, it may be useful to search for the salary range of an employee as it is unlikely that a user would know the exact salary of someone. Or, perhaps a range of start dates would be more useful and return more search results than searching for a single, exact date.

Users must enter From and To values to specify the range desired. New User-Defined fields can be created in the Performance Administration pages, added to Advanced Search, and then searched.



**Note:** Searching for a range of values is supported as an Advanced search only; not a Keyword search.

## Faceted Search Results

After performing a keyword or advanced search for employees, faceted search options are available on the subsequent search results page. Each facet displays a name, list of choices, and population counts for each choice. Facet values are displayed in descending order determined by the number of items in each facet; the facet values with the highest population count gets displayed first. Each time a facet is used, facet population counts and search results are automatically updated. All facet population counts are updated, except for the selected facet which retains its previous choices. Each facet displays a maximum of 5 values by default; users can add values as needed.



**Note:** Although you can perform a blank keyword search, entering search criteria ensures results are returned quickly.

There are two types of facets: public and secure. The concept behind having public and secure facets is the same as viewing an employee's Talent Profile. Organizational information, such as location, organization, and competencies is information that should be accessible to all, while review ratings, potential, and other metrics should be restricted to employee's managers and HR administrators. While access to the facets varies depending on the user, which facets are available is not configurable.

- Public Facets:
  - Organization
  - Location
  - Job Role
  - Competency Name (name only; not rating)

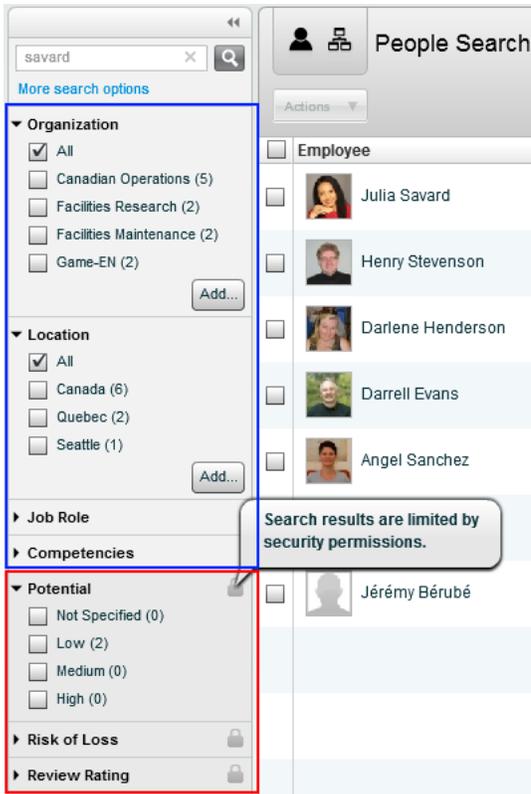
- Secure Facets: , Manager Competency Rating (presented as a sub-facet of the Competency facet), Potential - values activated/deactivated in Configurable Metrics, Risk of Loss - values activated/deactivated in Configurable Metrics
  - Review Rating - this is the same value as the Talent Profile Metric, Employee Rating
  - Manager Competency Rating - presented as a sub-facet of the Competency facet
  - Potential - values activated/deactivated in Configurable Metrics
  - Risk of Loss - values activated/deactivated in Configurable Metrics

Public facet values are displayed in a flat manner. This means that even though there can be a hierarchical, nested nature to the facet choices, they are displayed alongside one another. For instance, if an employee's location was Paris, France, the *Location* facet would list *Paris* and *France* as separate choices and not have the city, Paris, nested under the country, France.

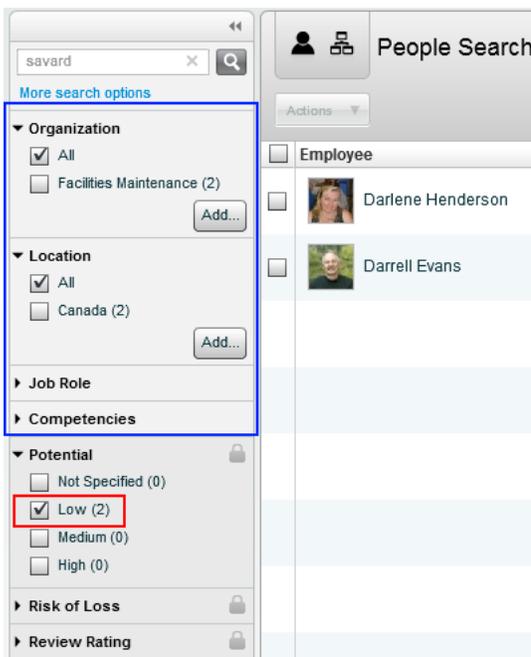
As secure facets are controlled by user type permissions, typically the population counts displayed in the secure facets will be lower than the counts for the public facets. For example, if a manager searched on their own name, the search results would display the manager and the manager's direct reports. When the manager selected the *Potential* secure facet, the total choices would be one less than the total amount of choices for the *Organization* facet because the manager does not have user type permissions to view their own metrics.

As well as secure facet results, the availability of the secure facets themselves are controlled by user type permissions. Typically managers and HR Administrators will be able to see secure facets, while employees will not.

Example of Initial Keyword Search Results: Henry Stevenson's keyword search on *savard*, displays Julia Savard and all of her direct reports, which includes Henry. The public facets display corresponding values for all of the employees that were returned by the search. Because of the flat manner in which the facet choices are displayed, this includes listing *Canada* and *Quebec* separately. As Henry is currently a matrix manager for two of the employees in the search results, his user permissions give him access to only their secure facet values. This is why the population count is only two, when seven people were returned by the search.



Example of Faceted Search Results: When Henry selects the *Potential* > *Low* secure facet, all of the facets — except the one he just selected — are updated along with the search results list.



## Keyword Search Fields

The Personal Information fields from a user's account and some Talent Profile fields in which text can be entered, such as Education, Work Experience and Certification details, are checked when running a keyword search.



**Note:** When you run a keyword search using a location, it uses the address details from the user account's personal information. This can be different from the Location field in the Talent Profile and the Current Location in the Search Results. Also, when searching on a job title, which comes from the personal information, it may be different than the position name on the user's Talent Card and Talent Profile.

Keyword fields	
First Name	Certification - certifications chosen from the selector
Last Name	Other Certification - certifications entered manually
Username - name used to login	Institution - place of study chosen from the selector
Job Title	Other Job Title
Email Address	Other Institution - places of study entered manually
Manager	Program - programs chosen from the selector
Location	Other Program - programs entered manually
Current Position	Zip Code
Organization	Job Function - job entered manually
Country	Employee Number
Competency Name - this is only the name and does not include the description	Other Employer - company entered manually
City	State
Employer	

## Configuration

These existing rating settings are used for the Ratings facet, along with the Talent Profile metric Employee Rating.

Configuration > [Performance] Settings	
Name	Description
Review Rating Metric Rating Model	Indicates the rating model used to determine the available values for the <i>Employee – Review Rating</i> metric.

Configuration > [Performance] Settings	
Name	Description
Metric Rating Model Rounding	Defines what value the employee ratings are rounded to.
Metric Rating Display	Defines how the rating scale is displayed; as percentage, numeric, text, and so on.
Show the 'Fit' Column in Person Search Result	Controls whether the Fit column is displayed in search results. The default value is No.

## Adding Employees to Modules

From the search results list, employees can be added to talent pools, succession plans, and requisitions.

You can add employees to succession plans, talent pools, and Recruiting requisitions, depending on which modules you have access to, are responsible for, and have been enabled for your system. When accessing the Go To menu, you do not see all of the items in the system, just those you can directly work with.

While you can add multiple employees to a module at one time, you can only add them to a single module at a time.

## To add employees to modules

Talent search and each of the three modules must be enabled.

You must have completed a search and have a list of employees.

You must have Common > Pool > Manage for talent pools

### Performance > Search Results

1. To add a single employee from the Employee column, click the Right Arrow icon to display the Go To menu and proceed to step 3.
2. To add multiple employees, select the check boxes for each employee you want to add and click **Actions** and the Down Arrow icon and proceed to step 3.
3. Choose the appropriate module:
  - o **Add to succession plan** - select the plan, sorting by any of the columns if required, and click **Select**.
  - o **Add to talent pool** - select the pool, which..., and click **Select**.
  - o **Add to requisition** - select the requisition, which includes the recruiter column that references the person with access to Performance and Recruiting, and click **Select**.
4. Click **Yes** in the confirmation message box to confirm you want to add the employees.

The employees are added to the module.

## Searching in Context

Talent searches can be initiated from within Succession Plans and Talent Pools, from where people can be added directly to the current plan or pool.

When in a Succession Plan or Talent Pool, choosing to add people displays the People Selector, while choosing Advanced Search displays full Talent Search options. When the results of an advanced search are displayed, you can add people directly to the current plan or pool, along with being able to add them to another module or requisition.

## To run a Talent Search in a Succession Plan

### Performance > [Navigation bar] Succession

1. Select the required employee to display their plan.
2. Click the Plus icon and select **Open Advanced Search**.  
Selecting **Add Person** displays the People Selector.
3. Select the criteria you want to use to filter your results and click **Search**.
4. To add a single person from the Employee column, click the Right Arrow icon to display the Go To menu and select **Add to current succession plan**.
5. To add people, select the checkboxes for each person you want to add and click **Actions**, the Down Arrow icon and select **Add to current succession plan**.

If one of the people selected is already a plan member, the Add to current succession plan option is not available.

The people are added to the succession plan as unranked successors. You can return to the plan by clicking the Up Arrow icon.

## To run a Talent Search in a Talent Pool

### [Navigation bar] > More dropdown > Talent Pools

1. Select a talent pool to display the **Members** tab.
2. Click the Plus icon and select **Open Advanced Search**.  
Selecting **Add Members**, displays the People Selector.
3. Select the criteria you want to use to filter your results and click Search.
4. To add a single person from the Employee column, click the Right Arrow icon to display the Go To menu and select **Add to current pool**.
5. To add people, select the checkboxes for each person you want to add and click **Actions**, the Down Arrow icon and select **Add to current pool**.

If one of the people selected is already a pool member, the Add to current pool option is not available.

The people are added to the pool. You can return to the pool by clicking the Up Arrow icon.

## Understanding Keyword Boolean Operators

To search effectively, it is important to understand the behavior of boolean operators.

Operator	Description
Wildcards	<p>When you enter words for keyword search, the system treats the search term as if it has wildcard characters added before the first and last character. For instance, searching for <i>smith</i> would be treated as if it was entered as <i>*smith*</i> and returns matches such as <i>naismith</i>, <i>smithers</i> and <i>wordsmithery</i>.</p> <p>When this behavior is applied to search terms using <i>AND</i>, <i>OR</i>, <i>NOT</i>, it takes the whole as if it was a single search term. This means that wildcard characters are placed in front of the first letter in the first word and after the last letter in the final word. For instance, searching for <i>son AND ste</i> returns matches such as <i>Karson Stewart</i> and <i>Alan Stephenson</i>. Using <i>son OR ste</i> returns those results, as well as <i>Emily Jackson</i>, <i>Madison White</i>, and <i>Steven Brown</i>.</p>

Operator	Description
	<p> <b>Note:</b> When there is no space between your search terms and an operator, you must explicitly enter the * wildcard character. For instance, if your search was <i>(ara OR Jenkins) OR (Dec)</i> it could return <i>Gordon Jenkins</i> and <i>Isabelle Martin</i>. If you then searched for <i>(*ara or Jenkins) OR (Dec*)</i> it could return <i>Gordon Jenkins, Isabelle Martin, Barbara Simmons, and Michael Decker</i>.</p>
AND	By default, words are linked (transparently) by the AND operator and results are the same as including it or wrapping a search term in double quotes. For instance, <i>Arthur Vandele</i> , <i>Vandele AND Arthur</i> , and <i>"Arthur Vandele"</i> all return the same results.
OR	The OR operator enables more expansive searches than the default AND behavior. People containing any of the terms are returned in the search results.
NOT	The NOT operator excludes specific keywords from the search. If you want to exclude multiple terms you can either add multiple NOT operators, such as <i>Smith NOT Michael NOT Gab</i> , or use parentheses, such as <i>Smith NOT (Michael or Gab*)</i> .
Double quotes	Double quotes are used to search for a specific set of keywords, such as <i>"Arpad Budapest Analyst"</i> will only return people that have those three words associated with their profile. It behaves in the same manner as using multiple ANDs, with the exception that the first and last characters do not automatically have wildcard operators attached to them.
Parentheses	<p>Search queries enclosed in parentheses are performed before other operations and enable more complicated searches. Effectively you can create mini searches that are combined into larger queries.</p> <p>For example, you could put the search for name, location, and job title into three parenthetical searches within a larger search, such as <i>(*son OR *sen) AND (Copenhagen or Malmo) AND (Analyst)</i>.</p>

# 2 Employee Management

## Working with Team Management

### Team Management

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

In the Talent Browser, a manager can request a change for members of his team. The manager can either take an individual he sees on his team and request that he be managed by someone else, or request that someone who is not shown on his team be added to his direct reports. As part of this process, the manager can also update data about the employee.

Depending on the standard field configuration for team management, the manager can have the ability to edit an employee's manager, current job role, location and organization. These changes can be configured to require approval. In such cases, the approval workflow must also be specified as part of the configuration.

In the event that a manager would like to remove a direct report from his team but does not know the name of the new manager, he can simply leave the manager name blank. The HR administrator will be required to assign the employee a new manager in order to approve the request.

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

Each type of change can be set to require approval, but a justification is always required for a change to be processed.

All requested or rejected changes are indicated on the employee's card in the Talent Browser.

## Adding an Employee to My Team

Adding an employee to My Team allows a manager to move an employee from another team to his own team.

### Performance > [Navigation Bar] Talent Browser

1. On the required employee card, click the down arrow icon and select the **Add Employee...**
2. In the Employee Addition window, click the magnifying glass icon to display the People Selector.

3. Search for employees in your direct reports, your network or by a general keyword search.
4. In the list of corresponding employee names, click on the desired name to highlight it and click **Select**.
5. If needed, change the current organization, location and/or job field of the employee by clicking on the corresponding checkbox and then by clicking the magnifying glass icon to open the relevant selector.
6. Proceed for each change in the same manner as you did for the employee name selection.

If approval is required, the request to add the employee will be sent for approval, and then the new employee will be added to the proper manager, as designated in the request.

## Removing an Employee from My Team

Removing an employee from my team allows a manager to remove an employee from his team and to move that employee to another team, if this information is known.

1. From the Talent Browser, locate the card of the employee you wish to remove from your team.
2. On the corresponding employee card, click the down arrow icon and select **Request Employee Change...**
  - o You can also leave the **Manager** field blank if you do not know the name of the new manager.
3. In the Request Employee Change window, check the **Manager** option and click the magnifying glass icon to display the Employee Selector.
4. Search for employees in your direct reports, your network or by a general keyword search.
5. In the list of corresponding employee names, click on the desired name to highlight it and click **Select**.
6. If needed, change the current organization, location and/or job field of the employee by clicking on the corresponding checkbox and then by clicking the magnifying glass icon to open the relevant selector.

## Requesting an Employee Change

Requesting an employee change consists in asking for an employee to be moved to another team or to change an employee's organization, location or job field information.

When you request to move an employee to another team, the job position might also be moved or left with the current manager, depending on the team management configuration.

1. From the Talent Browser, locate the card of the employee for which you want to perform a change:
2. On the employee card, click the down arrow icon and select **Request Employee Change...**
3. In the Request Employee Change window, indicate the change you wish to perform by clicking in the appropriate checkbox and then by specifying the new information.

The Manager field is the only one that can be left blank, in the case you want to move an employee to another team but don't know who the new manager is. In this particular case, the request is automatically sent to the HR administrator.

If the change requires an approval before being applied, it will be indicated for each change type.

4. Explain the reason of the change by providing a justification, which is mandatory.
5. Click **OK**.

The employee's card will display an information bar at the bottom indicating the requested change status. If a change request was rejected, a red indicator will be displayed, indicating that you need to view the rejection details to either acknowledge the rejection or to modify and resubmit the request. Once the change has been approved, the information bar disappears.

If no approval is required, the change will be done at that moment.

Once an employee is moved to another team, the new manager has full security rights to the employee's information and history. The old manager no longer has access to the employee or his history. The one exception to this rule is if the old manager still has open reviews related to the employee. In that case, the old manager is considered the review “author” and retains ownerships.

Once an employee change has been requested, it can be canceled if needed by the person who requested the change.

## Canceling an Employee Change Request

Only change requests that require an approval can be canceled, and only by the user who has originally requested the change.

1. From the Talent Browser, locate the employee card corresponding to the change to be canceled.  
The card will show a change information bar indicating that a change or a move has been requested.
2. On the corresponding employee card, click the Down Arrow icon and select **View Change Request Details...**
3. In the Change Request Details window, click **Cancel Request**.

The change request is canceled and the change information bar on the employee's card no longer displayed.

## Acknowledging a Rejected Employee Change

1. From the Talent Browser, locate the employee card showing a red indicator.
2. On the corresponding employee card, click the down arrow icon and select **View Rejection Details**.
3. In the Rejection Details window, do one of the following:
  - o Click **Acknowledge** to accept the rejection and indicate that you've viewed the details.
  - o Click **Resubmit** to display the Request Employee Change window and submit another request.
  - o Click **Close** to do nothing.

If you selected **Acknowledge** or **Resubmit** the change information bar on the card disappears.

## Team Management Fields

All user interface elements related to Team Management functions are presented in the following table. Each entry in the table includes an element, a description and the part of the application to which the element applies.

UI Element	Description	Applicable to	Function
Approval is late	Filter option that displays approval requests that have not been looked, with a due date in the past.	Team Management	Approval Request Filters
Approval Status	Filter option that displays approval requests according to their approval status, which can be:	Team Management	Approval Request Filters

UI Element	Description	Applicable to	Function
	<ul style="list-style-type: none"> <li>• Not Set - Displays all requests, without any consideration to the approval status.</li> <li>• Approval in Progress - Displays pending requests that have not yet been approved.</li> <li>• Approved - Displays no requests as for the moment, approved requests are no longer displayed.</li> <li>• Rejected - Displays approval requests that were rejected.</li> </ul>		
Assigned to	Filter option that displays approval requests that are assigned to a specific user. In the case of a change request, the approver is the assignee.	Team Management	Approval Request Filters
Changes Summary	Indication of the requested employee changes when related to a change in the organization, location, job field or job role.	Team Management	Approval Requests
Clear	Button that resets all filters to null.	Team Management	Approval Request Filters
Due Date	Date set automatically to the day following the date the change was requested.	Team Management	Approval Requests
Employee	Filter option that displays approval requests related to a specific employee.	Team Management	Approval Request Filters
Employee	Name of the employee for whom a change has been requested.	Team Management	Approval Requests
Initiating Manager	Name of the manager who requested the employee change.	Team Management	Approval Requests
Job Field	Filter option that displays approval requests related to a specific job field.	Team Management	Approval Request Filters
Job Role	Filter option that displays approval requests related to a specific job role.	Team Management	Approval Request Filters
Job Role	Option used to request the job role of an employee to be changed.	Team Management	Employee Change Requests
Justification	Text box used to enter the reason of the change, which is mandatory for the change request to be saved.	Team Management	Employee Change Requests
Location	Filter option that displays approval requests related to a specific location.	Team Management	Approval Request Filters

UI Element	Description	Applicable to	Function
Location	Option used to request the location of an employee to be changed.	Team Management	Employee Change Requests
Managed by	Filter option that displays approval requests that were initiated by a specific manager.	Team Management	Approval Request Filters
Manager	Option used to request the manager of the employee to be changed when moving an employee to another team. Note that it is also possible to move an employee without specifying the manager when you want to remove an employee from your team but don't know yet where to move that employee.	Team Management	Employee Change Requests
New Manager	Name of the target manager when an employee is moved to another team.	Team Management	Approval Requests
Organization	Filter option that displays approval requests related to a specific organization.	Team Management	Approval Request Filters
Organization	Option used to request the organization of an employee to be changed.	Team Management	Employee Change Requests
Refresh	Button that executes the search based on the selected filters and displays the corresponding requests in the result grid.	Team Management	Approval Request Filters
Results Per Page	Drop-down list that allows you to select the number of approval requests to be displayed at once on a single page, the maximum being 40 per page.	Team Management	Approval Requests
Status	Approval status of the request, which can be Approval in Progress, Approved, Rejected or Not Approved (which occurs when the approval process was canceled).	Team Management	Approval Requests

## Working with Matrix Management

### 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 any other tasks on behalf of the primary manager.

Matrix management is a technique of managing an organization (or, more commonly, part of an organization) through a series of dual-reporting relationships instead of a more traditional linear management structure. In its simplest form, a matrix configuration may be known as a cross-functional work team, which brings together individuals who report to different parts of the company in order to complete a particular project or task. Another example would be an employee who is managed by multiple supervisors, where the primary manager has named matrix managers for his employees. In all such cases, the matrix managers need to participate in the tasks related to the employees they were assigned, whether that be to write a performance review, approve a goal plan or even to assign development activities.

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.

Matrix managers are also added to the security relationships as matrix managers. In other words, matrix managers have both ownership and matrix manager security access.

A matrix manager can participate in various performance management processes such as reviews, goals, development plans, and succession plans. They may participate by conducting the tasks and actions of the primary manager or by directly providing input to these processes. However, for a matrix manager to edit or write an employee review, it must also be assigned as a review collaborator.

In Performance, matrix management is performed via the Talent Browser and provides the following capabilities:

- **Delegated Employee View** - This view of the organizational chart allows a matrix manager to view all employees that have been delegated to him, indicated by a dotted line. The delegated employee performance card indicates also the number of matrix managers each has.
- **Manage Matrix Management Relationships** - Via the “Manage Matrix Manager” action, a user can appoint a matrix manager to all or some of his employees and assign his tasks. When managing matrix managers, managers can add or remove matrix managers they have assigned as well as view a list of the employees they have delegated to each matrix managers.
- **Task Delegation** - When a manager chooses to delegate his tasks to the matrix manager, the tasks that would normally go to the primary manager are also be sent to the matrix manager, and therefore show in both the primary manager and the matrix manager's task list. The tasks that are delegated are those that are in relation to the delegated employees; for instance, tasks like network invitation sent to the primary manager would not be delegated to the matrix manager. Once the task is completed by either the original manager or one of the matrix managers, the task is considered complete and it is deleted from the task list.
- **Matrix Manager as Review Approvers** - A matrix manager may be selected as an approver type in a review's approval workflow. In such a scenario, the matrix manager will be notified when a review reaches the approval stage in the workflow and will be able to approve/reject the review as desired.
- **Searching Amongst Delegated Employees** - A user that has been named matrix manager can use the People Selector to search for people amongst their delegated employees.

There are various tasks and actions that a matrix manager may perform. In order for the matrix manager to receive tasks and complete the associated actions, the primary manager must have also delegated his tasks to matrix manager. Following is a table listing all the actions than can be performed by matrix managers versus those allowed to review collaborators.

Task or Action	Tasks that can be done by a collaborator	Tasks that can be done by a matrix manager*
Write Employee Review (initial, rejected or restarted review)	Yes	No
Submit for Approval	No	Yes
Reopen for Approval	No	Yes
Decide on Approval	No	No (unless the matrix manager is defined as an approver in the review workflow or the original approver has delegated his tasks to this matrix manager)
Release Employee Review	No	Yes
Request Acknowledgment	No	Yes
Acknowledgment	No	No The matrix manager cannot acknowledge the review on behalf of the employee even if the "Allow manager to override employee acknowledgment" setting is active in review process definition.
Send Review Back to Employee	No	Yes
Cancel Review	No	No
Transfer Review	No	No
Manager Review Collaborators	No	No
Notified of task 'Write Employee Review' or 'Reopen for Approval' via Task List	Yes	Yes
Notified of task 'Submit for Approval', 'Release', 'Request Acknowledgment' or 'Close' via Task List	No	Yes

\*Note that if a matrix relationship is created before review generation, the matrix manager is automatically added as a review collaborator and therefore be able to perform the tasks allowed to collaborators.

Like the primary manager, the matrix manager is entitled to send a review back to an employee under the following conditions:

- As long as the review is in a Draft status and not yet submitted for approval, and
- If the review request configuration indicates that this action is possible (via the setting 'Allow Manager to Restart Review Workflow')

HR administrators are can configure matrix management options as follows:

- View, edit, and delete matrix management relationships created by managers, for any coverage area.
- Create new matrix management relationships on behalf of managers, for any coverage area. The managers are in turn entitled to view, edit, and delete those matrix relationships created by the HR administrator.

## Configuration

Matrix management functions are optional and must be configured with the proper settings and user permissions.

Settings from Configuration > [SmartOrg] Settings				
Setting Name	Setting Description	Possible Values	Security Level	Setting Category
Matrix Management Enabled	Enables matrix management functionalities allowing a manager to delegate his tasks to another manager.	<ul style="list-style-type: none"> <li>Yes</li> <li>No (default)</li> </ul>	Public	Matrix Management
Extended Matrix Management	Indicates if matrix manager relationships also apply to the direct reports of delegated employees.	<ul style="list-style-type: none"> <li>Yes</li> <li>No (default)</li> </ul>	Public	Matrix Management
Maximum Number of Matrix Managers	Indicates the maximum number of matrix manager relationships that can be set for an employee.	<ul style="list-style-type: none"> <li>5 (default)</li> </ul>	Public	Matrix Management
Maximum Number of Matrix Management Requests	Indicates the maximum number of matrix management requests a manager can have at the same time.	<ul style="list-style-type: none"> <li>5 (default)</li> </ul>	Public	Matrix Management
Employee Change Matrix Management Behavior	Indicates how matrix manager relationships are handled when an employee changes manager.	<ul style="list-style-type: none"> <li>Keep matrix managers</li> <li>Remove matrix managers (default)</li> </ul>	Public	Matrix Management

In addition to the configuration settings, users need to have specific permissions granted to be allowed to perform matrix management functions.

Permissions Configuration > [SmartOrg] Administration > [Users] User Accounts	
Permission Name	Setting Description
<b>Performance &gt; Team Management &gt; Access Talent Browser</b>	<p>This permission grants the user access to the Talent Browser. This permission must be granted in conjunction with the appropriate View/Manage permission listed below.</p> <p>If a user has this permission, he will be entitled to perform matrix management requests; however, to perform delegated tasks, he will need, for each context, to have the View - If the user is a matrix manager or the Manager - If the user is a matrix manager permission.</p> <p><b>**If an organization wants to let the managers perform matrix management requests but not any employee change requests, the administrator needs to disable the editability of all Team Management Standard Fields (such as the manager, organization, location, and job role).</b></p>

Permissions Configuration > [SmartOrg] Administration > [Users] User Accounts	
Permission Name	Setting Description
<b>Performance &gt; Performance Reviews &gt; View - If the user is a matrix manager</b>  <b>Performance &gt; Performance Reviews &gt; Manage - If the user is a matrix manager</b>	This permission allows the user to view and/or manage performance reviews if designated as a matrix manager.
<b>Performance &gt; Goal Plans &gt; View - If the user is a matrix manager</b>  <b>Performance &gt; Goal Plans &gt; Manage - If the user is a matrix manager</b>	This permission allows the user to view and/or manage goal plans if designated as a matrix manager.
<b>Performance &gt; Career Plans &gt; View - If the user is a matrix manager</b>  <b>Performance &gt; Career Plans &gt; Manage - If the user is a matrix manager</b>	This permission allows the user to view and/or manage career plans if designated as a matrix manager.
<b>Performance &gt; Development Plans &gt; View - If the user is a matrix manager</b>  <b>Performance &gt; Development Plans &gt; Manage - If the user is a matrix manager</b>	This permission allows the user to view and/or manage development plans if designated as a matrix manager.
<b>Performance &gt; Employee Metrics &gt; View - If the user is a matrix manager</b>  <b>Performance &gt; Employee Metrics &gt; Manage - If the user is a matrix manager</b>	This permission allows the user to view and/or manage employee metrics if designated as a matrix manager.
<b>Performance &gt; Employee Profile &gt; View - If the user is a matrix manager</b>  <b>Performance &gt; Employee Profile &gt; Manage - If the user is a matrix manager</b>	This permission allows the user to view and/or manage talent profiles if designated as a matrix manager.
<b>Performance &gt; Team Management &gt; Access administration tools</b>	This permission grants the user access to the HR Administration Tools. This permission, in conjunction with 'View as another employee' is required to allow an HR administrator to manage (create, view, edit, delete) matrix management relationships.
<b>Performance &gt; Team Management &gt; Access Manage Matrix Manager</b>	This permission is required for the logged in user to have the option available from their card in the Talent Browser.

Aside from the configuration settings and permission, the matrix manager role has been added to the list of available roles in the Role Selector when setting the approvers of a review definition. Furthermore, the matrix manager can also be designated as a calibrator.

## Viewing Your Delegated Employees

### Navigation bar > Talent Browser button

1. Set the scope to Direct Reports.

If you have delegated employees, they are displayed with dotted lines indicating the matrix management relationships.

## Designating a Matrix Manager for an Employee

### Performance > [Navigation bar] > More dropdown > Talent Browser

This action is only available for the connected manager, and only from his own performance card, which is the highest one in the hierarchy.

1. From your own performance card, select **Manage Matrix Manager** in the **Go to** menu.
2. In the **Manage Matrix Manager** window, click the Plus icon.
3. In the **Matrix Manager** window, select the name of the matrix manager using the Magnifying Glass icon.
  - a. In the **People Selector**, specify the type of search and then select the matrix manager from the search results.
  - b. Click **Select**.

Once back on the **Matrix Manager** window, the name of the selected person will be in the **Matrix Manager** field.

4. Enter the duration of the matrix management relationship.
5. Indicate whether you want to delegate your tasks to this person by selecting the related option.
6. Specify the employees that you want to delegate to this matrix manager.
  - a. Click the Plus icon.
  - b. In the **People Selector**, specify the type of search and then select the delegated employees from the search results.
  - c. Make sure to click the Right Arrow icon to move the selected employees to the Selection list.
  - d. If you want to also include the direct reports of a selected delegated employee, check the related option.
  - e. Once all employees are selected, click **Select**.
7. Back to the **Matrix Manager** window, verify the information and click **OK** to save.
8. Back to the **Manage Matrix Manager** window, click **Close**.

The matrix management relationship has been defined. The tasks occurring during the specified period will be sent to both the original manager and the matrix manager, and will show in their respective task list.

## Ending a Matrix Management Relationship

### Performance > [Navigation bar] Talent Browser button

This action is only available for the connected manager, and only from his own performance card, that is the highest one in the hierarchy.

1. From your own performance card, select **Manage Matrix Manager** in the **Go to** menu.

2. In the **Manage Matrix Manager** window, select the matrix manager to remove and click the Minus icon.
3. Click **Close**.

The matrix manager will be removed, as well as all matrix management relationships that you had established.

## Managing a Matrix Management Relationship on Behalf of a Manager

- The user must be an HR administrator.
  - The user must have the permission **Performance > Team Management > Access administration tools** .
  - The setting **Configuration > [SmartOrg] Settings > Matrix Management Enabled** is set to Yes.
1. From the Performance home page, log in as the manager for whom you want to either view, create, edit or delete the matrix management relationship.
  2. From the Talent Browser of that manager, open the Go to menu of the manager's performance card and select **Manage Matrix Manager**.
  3. In the **Manage Matrix Manager** window, perform the desired action.
    - To assign a new matrix manager for this manager, click the Plus icon. In the **Matrix Manager** window, specify how long the matrix management relationship will be valid, indicate whether you want to delegate the tasks to this matrix manager and select the employees to be delegated to this matrix manager.
    - To view or edit an existing matrix management relationship, select the desired matrix manager and select **View Details...** from the contextual menu. Enter and save your changes if so required.
    - To remove a matrix manager, select the desired matrix manager and click the Minus icon.
  4. Once you have completed your task, close the **Manage Matrix Manager** window.

The matrix management relationship task will be performed as requested and is automatically applied

## HR Administrators Working with Employees

### Filtering Approval Requests

Filtering approval requests allows HR administrators to sort pending succession plans, employee goal plans, performance reviews and employee change requests by approval status and to take action, by either rejecting, approving or canceling the approval.

All approval requests can be viewed by HR administrators as long as the approval request is pending, meaning that no action has been taken by any authorized approvers.

**Performance > [HR Administration Tools] Performance Review**

**Performance > [HR Administration Tools] Succession Plan**

**Performance > [HR Administration Tools] Goal Plan**

**Performance > [HR Administration Tools] Team Management**

## Performance > [HR Administration Tools] Development Plan

1. Depending on the requests you wish to view or to take action upon, from the Filters panel, specify the elements to be shown in the results by using any combination of filters. Following are a few examples:
  - o To view requests depending on their approval status, select the desired approval status in the selection list.
  - o To view only the approvals that are late, check the corresponding option.
  - o To see approval requests assigned to a specific user, click the Magnifying Glass icon to select that user's name in the Assigned to field.
  - o To see approval requests related to a specific organization, location, job field or job role, employee, incumbent, review cycle, or any other filter option, click the corresponding Magnifying Glass icon to select the desired element.

For a description of filter options, please refer to the Fields and Buttons section associated to the type of approval requests, such as Performance Review Fields and Buttons.

2. Once all filters are specified, click Refresh to show the corresponding approval requests in the result section.
3. If needed, you can change the number of results per page to see more or less results at a time.

The Filter Results section will display the approval requests corresponding to the specified filters. The status bar of the page shows the number of displayed requests over the total.

When users enter the Performance Review Administration pages for the first time, no data is loaded. Users select their filters and click the **Refresh the results** icon to load only the data that they are interested in, thereby increasing performance. When these filters are set once, they are memorized within a single session. If the user navigates away from the page and comes back, the filters previously set will be preserved. If the user wants to clear the filters, selecting the **Clear the filters** icon will do so.

Once the filtered approval requests are displayed, you can approve or reject the request, cancel the approval process or even specify the target manager in the case of employee changes or to complete a currently pending step in the case of performance reviews.

## Viewing Employee Change Request Details

Viewing the employee change details allows HR administrators to see the name of the person who requested the change, the subject and the reason of the change.

### HR Administration Tools > Team Management

1. Filter the requests in order to view the employee for which you want to view request details.
2. In the result grid, click on the name of the desired employee,.
3. Once you have viewed the information, click Close to return to the result view.

## Viewing Approval Details

Viewing approval details allows HR administrators to see the date the approval request was assigned and the date it is due, as well as the name of all possible approvers.

All approval requests can be viewed by HR administrators as long as the approval request is pending, meaning that no action has been taken by any authorized approvers.

**Performance > [HR Administration Tools] Performance Review**

**Performance > [HR Administration Tools] Succession Plan**

**Performance > [HR Administration Tools] Goal Plan**

**Performance > [HR Administration Tools] Team Management**

**Performance > [HR Administration Tools] Development Plan**

1. Filter the requests in order to view the element for which you want to the approval details.
2. Next to the name of the desired element, click the down arrow icon to open the Go To menu and select the View Approval Details option.
3. The Approval Details window will display information about the approval, such as the assigned and due dates as well as all the possible approvers.
4. Once you have viewed the information, click Close to return to the result view.

## Assigning a Target Manager

Assigning a target manager is a task that is done by an HR administrator when there is a request to move an employee from one team to another and the manager of the new team has not been specified.

For this task to be available, the change must be related to a team change where the new manager was not specified by the person who requested the change.

**HR Administration Tools > Team Management**

1. Filter the approval requests in order to view the change request for which you want to specify the new manager.
2. In the result grid, next to the name of the corresponding employee, click the right arrow icon to open the Actions menu and select Change the Target Manager.
3. In the Allocate a Manager window, click the lookup icon to select the new manager.
4. Once the manager is selected and its name is shown, click OK.
5. If the action was completed successfully, a confirmation message will display and you will have to click Close.

The name of specified manager now shows in the New Manager column.

## Accepting an Approval Request

Accepting an approval request consists in basically performing the approval that has been requested.

To be able to decide on the approval, the approval must have been requested.

**Performance > [HR Administration Tools] Performance Review**

**Performance > [HR Administration Tools] Succession Plan**

**Performance > [HR Administration Tools] Goal Plan**

**Performance > [HR Administration Tools] Team Management**

**Performance > [HR Administration Tools] Development Plan**

1. Filter the approval requests in order to view the element to be approved.
2. In the result grid, select one employee or more:

- to approve only one element, click the right arrow icon next to the name of the desired element;
- to approve multiple elements at once, check the desired elements one by one or check the corresponding column header to select all elements on the page.
- 3. From the Actions menu, select Decide on Approval.
- 4. In the Request Approval window, select Approve and enter any needed comments.  
If all selected elements CANNOT be approved, a Partial Action window will be displayed, listing the elements for which approval was not possible.
- 5. Click OK.

Once approved, the request is no longer displayed in the task list.

## Rejecting an Approval Request

Rejecting an approval request corresponds to not accepting the approval that is requested.

To be able to decide on the approval, the element's approval must be in progress.

**Performance > [HR Administration Tools] Performance Review**

**Performance > [HR Administration Tools] Succession Plan**

**Performance > [HR Administration Tools] Goal Plan**

**Performance > [HR Administration Tools] Team Management**

**Performance > [HR Administration Tools] Development Plan**

1. Filter the approval requests in order to view the element for which you want to reject the approval.
2. In the result grid, select one employee or more:
  - to reject the approval of only one element, click the right arrow icon next to the name of the desired element;
  - to reject the approval of multiple elements at once, check the desired elements one by one or check the corresponding column header to select all elements on the page.
3. From the Actions menu, select Decide on Approval.
4. In the Request Approval window, select Reject and enter any needed comments.
5. Click OK.

Once rejected, the approval request remains in the list but with a rejected status.

## Canceling an Approval Request

Canceling an approval request consists in terminating the entire approval process as if it had never been assigned.

**Performance > [HR Administration Tools] Performance Review**

**Performance > [HR Administration Tools] Succession Plan**

**Performance > [HR Administration Tools] Goal Plan**

**Performance > [HR Administration Tools] Team Management**

## Performance > [HR Administration Tools] Development Plan

1. Filter the approval requests in order to view the element for which you want to cancel the approval request.
2. In the result grid, select one employee or more:
  - o to reject the approval of only one element, click the right arrow icon next to the name of the desired element;
  - o to reject the approval of multiple elements at once, check the desired elements one by one or check the corresponding column header to select all elements on the page.
3. From the Actions menu, select Cancel Approval Process.
4. When asked to confirm the cancellation, click OK.

If all selected elements CANNOT be canceled, a Partial Action window will be displayed, listing the elements for which approval cancellation was not possible.

Once canceled, the approval request is no longer displayed.

## Native Reports

Predefined reports can be run from within Oracle Taleo Enterprise Edition Performance, without the need to move to a different module or have special access. This enables reports to be quickly and simply generated on common subjects, such as goal plan status or performance review details. Native reporting lets managers report from within a module, where they simply select which employees they want to include in the report and what subject they want to report on, based on the available templates.

Beginning in Feature Pack 13C Native Reporting is based on the Oracle Business Intelligence Publisher (BI Publisher or BIP). The content of the delivered native reports has not changed from prior releases. Report layout may be slightly different due to the change in reporting technology. Customers are also able to create their own custom reports. The language selected at login determines which language the report is generated in. The report data displays in that login language, however, the language of the template reports are shown in the language they were originally created. The report labels display as designed in the report template. A separate report template must be created for each language if it is necessary for the report template and language to match. By default reports are available in Performance; however, they can also be emailed as attachments with additional configuration.



**Note:** For details on how to configure native reporting, and how to use native reporting and BI Publisher to create custom native reports, see the **Oracle Taleo Enterprise Edition Performance Administration Guide**.

### Delivered Reporting Templates

The following report templates are delivered:

- **Goal Plan Status** - Includes goal plan status information about the selected population. The report focuses on the plan status and approval date along with useful employee information such as their location and organization.
- **Development Plan Status** - Similar to goal plan, except that it deals with development plans.
- **Review Status** - Includes review status information about the selected population. It is useful for Employee Self-Assessment and Manager Evaluation statuses along with typical employee information.
- **Review History** - Includes the historical performance review scores for the selected population. The report focuses on the goal score, the competency score, and the Overall Review Rating.

- **Performance Review Summary** - Can include the review status, goal section score, and competency section score for a designated review cycle and review request.
- **Talent Profile** - Provides a consolidated view of an employee's information such as their job, work history, skills and qualifications, performance, and development.
- **Organization Chart** - Contains the organization charts for all the direct reports under the senior leader specified in the Select Employee(s) section of the Run a Report dialog. The report can provide a useful tool for compiling a talent book for the organization, although it is not an exact replica of the Talent Browser. If a manager has too many direct reports, not all nodes will be shown. It is recommended that each individual manager's organization chart report should be run separately to include all members. Note: This report is not modifiable by customers using the BI Publisher technology.

## Customizing Reports and Templates

Listed below are a few of the entities within native reports that can be configured or customized.

- **Employee Status** - Users can now include *Employee Status* in their reports. The Employee Status refers to the status in the SmartOrg user account. The possible statuses are *New*, *Current* or *Former*.

The *Employee Status* has been added to the following data models:

- Employee Data Model
- Talent Profile Data Model
- Employee Manager Data Model
- Position Manager Data Model
- **Coverage Area** - Instead of having to select a population based on employee hierarchy, direct reports, for example, users can now run reports based on coverage areas, or OLF data. This extends the Native Reporting capability for users, especially the needs of HR Administrators to report across the organization against coverage area, (organizations, locations and job functions) to provide more flexibility analyzing specific population segments.
- **Successor Readiness** - Prior to 15A, reports picked up only successors with a readiness value set. Now reports can also retrieve successors with a readiness value of *Not Specified*.
- **Historical Review** - Administrators can create a custom data model that joins the Review History to the Employee base data model, exposing the Review History data for reporting.

### Data Model Editor

This page allows you to edit a data model. Please check all data set attributes that you would like to include in this data model.

**Data Model Content** | [Expand Tree](#) | [Collapse Tree](#)

- [-] Employee Data Model
  - [x] Employee +
    - [-] Historical Review Data Model x
      - [x] Historical Review
        - [-] Employee Manager Data Model x
          - [ ] Employee Manager +
        - [-] Job Role Data Model x
          - [ ] Job Role
            - [ ] Job Role Certification Requirement
            - [ ] Job Role Competency Requirement
            - [ ] Job Role Definition
        - [ ] Historical Review Entry
          - [ ] Historical Review Manager Score
      - [ ] Employee Location
      - [ ] Employee Metrics
      - [ ] Employee Organization

Data Set Field Detail
<b>Historical Review</b>
EffectiveDate
EmployeeNumber
EmployeeReviewEndDate
EmployeeReviewJobRole
EmployeeReviewManagerNumber
EmployeeReviewNumber
EmployeeReviewStartDate
EvaluationTaskAssignmentDate
HistoricalReviewNumber
LastApprovalStatusChangeDate
LastModifiedDate
MostRecent
OverallNormalizedScore
OverallScoreHigh
OverallScoreLabel
OverallScoreLow
OverallScoreNumericalValue
OverallScoreSelfEvalNumericalValue
OverallScoreSelfEvaluationLabel
OverallScoreSelfEvaluationValue
OverallScoreValue
PeriodEndDate
PeriodStartDate
ReviewCycleCode
ReviewCycleEndCyclePeriod
ReviewCycleName
ReviewCycleNumber
ReviewCycleStartCyclePeriod
ReviewCycleTypeCode
ReviewCycleTypeDescription
ReviewLastModifiedDate
ReviewRequestAssignmentDate
ReviewRequestCode
ReviewRequestEndPeriod
ReviewRequestName
ReviewRequestNumber
ReviewRequestStartPeriod
ReviewRequestTypeCode
ReviewRequestTypeDescription
SelfEvalTaskAssignmentDate

**Note:**



- Historical review scores are stored at the employee level, not at the review cycle level so users must select the group of employees first, then the review. For example, R&D, then Reviews 2011.
- The employee's OLF is not stored at the time of review generation, therefore, anyone who left R&D after the 2011 reviews were generated will not be included.

### Accessing and Generating Reports

When you are granted permissions to access and generate reports the navigation bar at the top of the Performance application includes a Reports link. From any Performance module follow the link to open the My Reports dialog.

Also generate native reports from many other locations in Performance:

- Advanced Search > Actions > Create Report
- Advanced Search > Employee inline menu > Create Report
- Talent Profile > More Actions Menu > Create Report
- Talent Browser > Employee Card inline menu
- Talent Browser > More Actions menu > Create Report
- Review Hub > More Actions menu > Create Report

- Review Hub > Employee inline menu > Create Report
- Talent Pool > Talent Pool inline menu > Create Report
- Talent Pool > More Actions menu > Create Report
- Talent Pool > Talent Pool > Members > Employee inline menu > Create Report
- People Search - Users can run reports directly from the People Search results, pre-populating the report filter with either the search result criteria or the search selections.

If users select all the employees from the search results and then select *Run Report*, they are presented with a pop-up prompting them to choose whether to run the report on the selected employees or all employees. The data displays up to 20 rows per page.



**Note:** The number of rows available to report on is dependent on the Advanced Search setting that defines how many rows are returned for the People Search. While reporting allows up to 5000 rows, the default value is 500 and it is recommended that this value be retained to optimize performance.

**My Reports Dialog** The My Reports dialog displays a list from which you can access previously generated report instances, for both delivered and custom reports. For each report instance the dialog presents the report Name, Number of employees included in the report, Request Date and Status. The count is the Number of Positions in the case of Positions and the Number of Talent Pools in the case of Talent Pools. For measurement reports the count is always shown as 0. If you want to generate a different report instance with different parameters, click the Run Report link at top of the dialog to open the Run a Report dialog. The Name field has a **More Actions** dropdown selector providing these options:

- **View** - Use to view the report content in the specified output format.
- **Download report data** - Use to download the report data in an XML file.



**Note:** Not all users will have this option. This is configurable and the *Access Report Data* setting must be enabled at the user level for this option to display.

- **Delete** - Use to delete the report instance from the list.

When you run a report and first come to the dialog box to open the report instance it may not yet be displayed. Click Refresh to prompt the report instance to display on the list.

### Run a Report Dialog

The Run a Report dialog is accessed using the Run Report link on the My Reports dialog. It provides the ability to generate new report instances using different report parameters, for both delivered and custom reports. You can only select and run one population/report combination at a time.

The reports and report output types available to a you depends upon your organization's implementation. Configured group and role restrictions for report display are applied to the Run a Report dialog. Performance only loads permitted reports on your page.

The Organization Chart is available only in the PDF and PPT report output formats. A customizable data model is not available for the Organization Chart report, you cannot create a custom Organization Chart report.

The Run a Report dialog has five tabs grouping reports by employee population type (employees, positions, talent pools, reviews, goals). The following table lists the selection parameter values presented for each type.

Category tab (entity type)	Selection Parameters
Employees	<ul style="list-style-type: none"> <li>• Direct Reports</li> <li>• Direct Reports + One Level</li> <li>• All my employees</li> <li>• Specific employee(s)</li> <li>• Talent Pool</li> <li>• Employees in my coverage area</li> </ul>
Positions	<ul style="list-style-type: none"> <li>• All my positions</li> <li>• Specific position(s)</li> <li>• Positions in my coverage area</li> </ul>
Talent pools	<ul style="list-style-type: none"> <li>• All my talent pool(s)</li> <li>• Select talent pool(s)</li> </ul>
Reviews	<ul style="list-style-type: none"> <li>• Review Cycle</li> <li>• Review Request</li> <li>• Review Request Group</li> <li>• Coverage Area Filters</li> </ul>
Goals	<ul style="list-style-type: none"> <li>• Business Period</li> <li>• Coverage Area Filters</li> </ul>

## Running Reports

Running reports involves creating report instances which you subsequently send to the printer server for generation, and then viewing the reports via Performance or email.

- *Generating and Running New Report Instances*
- *Viewing Existing Report Instances*

## Generating New Report Instances

New report instances can be generated from throughout the system, wherever you can access the My Reports dialog, and take the current context into consideration when initially setting the criteria for the report.

For instance, if you select **New Report** from the Talent Browser — which is set to display direct reports — then the **Direct Reports** option is preselected in the New Report window. The reports available to choose from are based on the main components of the system — development and goal plans, performance reviews along with review status and ratings history, talent profile — and will be bespoke for your organization. Reports are not generated on-demand. You may have to wait a number of minutes before you can view the report.



**Note:** Your reports only contain information on employees you have access to.

## Running a Report Instance

You must have the **Team Management > Access Reporting** user type permission.

Your access to a given report may be further restricted by User Group or User Role configuration.

**[Navigation bar] > Reports**

**[Navigation bar] > Talent Browser button > More Actions**

**[Navigation bar] > Talent Browser button > Performance Card**

**[Navigation bar] More dropdown > Talent Pools > More Actions**

**[Navigation bar] More dropdown > Talent Pools > Employee > Actions menu**

**[Navigation bar] > Profile > More Actions**

**[Navigation bar] > Reviews > Employee > Actions menu**

**Search Results > Employee > Go To menu**

1. In the My Reports dialog click the **Run Report** link.
2. In the **Run a Report** dialog click the appropriate employee population type tab and enter the applicable employee population parameters for the desired report.  
The number of employees that will be included in the report is displayed at the bottom of the tab.
3. In the Select a Report section locate and click the report's name from the list. Reports are listed by domain (module). Available delivered and custom reports are listed, subject to your access permissions.
4. In the Customize the Report section:
  - a. Choose any additional temporal selection parameters, such as Business Period or Review Cycle, if any.
  - b. Give the report instance a name.
  - c. Then select the desired output format.
5. Click **Run Report**.  
The report instance is sent to the reporting server.
6. In the popup dialog that displays do one of the following:
  - o Click OK to close the dialog and return to the original page you were on.
  - o Click **Go to My Reports**, where the report's progress is displayed. In the My Reports dialog you can click Refresh until the report instance displays at the top of the list with a status of Ready. When the report is ready it will be accessible from the My Reports window. If the report cannot be created an error message is displayed.

Depending on your system configuration you may open the report instance by clicking the hyperlinked report name on the My Reports dialog, or the report may also be emailed to you. In either case when you open the report it will be in the selected output format you chose on the Run Reports dialog.

## Viewing Reports

Once you have generated a report and it has been run, you can view it from throughout Performance, anywhere the Reports link is available. Reports can also be configured to be emailed to whoever created them.

While the context you are in can affect the default options available when you want to generate a new report instance, regardless of where you access the My Reports dialog from, the report will display the same details.

When you receive a report via email you will receive a link to the report in Performance and you may also get an attached PDF. Whether an attachment is included is dependent on the PDF not exceeding the attachment file size limit.

When you select the link (not the attachment) in the email you may be prompted to sign into Performance, but then the report will be displayed automatically, without the need for additional navigation. If the report expires before you access it, the report name is no longer clickable.

### Large Profile Picture in Native Reporting.

Native Reports display a larger, higher quality employee photo image in the header section. It is the same image as that for the Talent Profile' General section:

- Image format can be .gif, .jpg. or .png.
- Image size is 256 x 256 pixels, passport style.

Some configuration is needed for the photo to display in the Talent Profile and for the user to be able to upload the photo for the Talent Profile.

### Viewing Report Instances

You must have the **Team Management > Access Reporting** user type permission in Configuration. Your access to a given report may also be limited due to User Group or User Role report access permissions.

Navigation:

**[Navigation bar] > Reports**

**[Navigation bar] > Talent Browser > More Actions**

**[Navigation bar] > Talent Browser > Performance Card > More Actions menu**

**[Navigation bar] More dropdown > Talent Pools > More Actions**

**[Navigation bar] More dropdown > Talent Pools > Employee > Actions menu**

**[Navigation bar] > Profile > More Actions**

**[Navigation bar] > Reviews > Employee > Actions menu**

**Search Results > Employee > Go To menu**

1. In the My Reports dialog the hyperlinked names of existing (previously generated) report instances are displayed in a list.  
The list displays all the reports you have requested, along with how many employees were included in the report, its request date, and status. If the status is **Ready** it can be viewed; however, if the status is **Not Ready**, **Expired**, or **Error**, it cannot be viewed. If the status is **Not Ready**, you can try clicking Refresh to prompt the report instance to display.
2. Click the desired report name to open a version of the report instance in the previously selected output format.  
Only reports that are ready will have active hyperlinks and can be opened. The way the report opens is dependent on your internet browser settings. If you do not have Adobe Reader installed, you will be prompted to do so for reports that are PDF output.

The report opens and you can choose to save it or print it.

Click **Archived** to display additional reports or click **Run Again** to rerun the report with the most current data.

After viewing, you can delete the report instance by selecting the Name field dropdown (the Down Arrow icon) and clicking **Delete** from the available options.

# Employee Delete

The Employee delete feature provides the ability to filter, review, and delete former employees from the system as required by legal constraints in EMEA and other regions.

## The Person Model

A person in the system can be composed of the following parts:

- User Account – to access the system with granted permissions.
- Candidate Account – to apply for jobs through the Career Section.
- Profile – to store the common profile. Employee and Candidate share the same profile.
- Employee – to store employee related data.

When a candidate is hired, he gets a user account and an employee associated to his profile:

- As an employee, the profile is maintained through Performance Talent Profile
- As a candidate, the profile is maintained through Recruiting and the Career Section.

## Employee Delete Strategy

Employee Delete only removes employee specific data.

The Candidate account and common profile are left intact. This will allow the person to be rehired in the future. The person may remain in current pools or succession plans. The Candidate account can eventually be deleted as a distinct task if Recruiting is available in the system.

Deleted	Not Deleted
<p><b>Employee Specific Data</b></p> <ul style="list-style-type: none"> <li>• Employee Metrics</li> <li>• Pictures</li> <li>• Job History</li> <li>• Matrix Management</li> <li>• Remaining Tasks</li> <li>• Compensation History</li> <li>• Goal Plans, Goals, Tasks (aligned goals will be unlinked)</li> <li>• Performance Reviews &amp; Review History</li> <li>• Career Plans</li> <li>• Development Plans</li> <li>• Received Feedbacks</li> </ul>	<p><b>Other Performance Data</b></p> <ul style="list-style-type: none"> <li>• Business Goals</li> <li>• Projects</li> <li>• Sent Feedbacks</li> <li>• History of actions taken by the employee</li> </ul> <p><b>Profile and Candidate Data</b></p> <ul style="list-style-type: none"> <li>• General Profile (Education, Experience, Certifications, Preferences, etc)</li> <li>• Job Submissions</li> <li>• Offers</li> </ul> <p><b>Talent Pools &amp; Succession Plans</b></p> <ul style="list-style-type: none"> <li>• Remains as member (now as an external candidate).</li> </ul> <p><b>User Specific Data</b></p>

Deleted	Not Deleted
<ul style="list-style-type: none"><li>• Sent Feedback Requests</li></ul>	<ul style="list-style-type: none"><li>• Remains in the system but inactive.</li></ul>

## Employee Delete Rules

- Only terminated employees can be deleted.
- Employee must not be owner manager of positions. A transfer of ownership is required prior deletion.
- Employee must not be owner of talent pools. A transfer of ownership is required prior deletion.

## Employee Delete Process

Employee delete is a three step process:

1. Employee termination
2. Deletion task creation
3. Task monitoring

## Limitations

- No archiving capabilities at this time.
- The user account cannot be permanently deleted from the system.
  - User accounts are only virtually deleted but remain in the system.
  - The user account does not contain employee related data.
- Products for which the data will not be automatically deleted by the Employee Delete task:
  - Learn
  - Evaluation Management
  - Assessment
  - Passport
  - Talent Exchange
  - Analytics
  - Any other external products integrated with Oracle Taleo Enterprise Edition



# 3 Goal Management

## Getting started with Goal Management

### Goal Management

The Goal Management feature provides an alternative to traditional organizational hierarchies, one that is used specifically for goal management. In most organizations, the traditional organizational structure used for cost center management is too fine-grained for business goal management. The alternative structure enables the organization to use a simplified organizational structure for goal management. For example, an organization might have multiple cost centers for managing its call center support that might be, in turn, organized by product or geographic location.

The Goal Management feature provides the ability to define employee goals and competency goals, as well as themes, business goals, projects and project milestones.

- A theme is the highest level used for categorizing goals. Themes provide support for organizations that use balanced scorecards in that they allow the categorization of goals and projects into specific scorecard categories such as Financial, Customer, and Development.
- Business goals are qualitative or quantitative statements of an organization's intentions or objectives, for example, "Increase operational efficiency 5%."
- Projects are discrete efforts by the organization. Projects provide the ability to assign a project owner and to assign goals directly to employees working on the project, for example, "Evaluate, select and implement a talent management solution."
- Within a project, a milestone is an element that marks the completion of a specific set of tasks or a phase, typically marked by a high-level event such as a completion, an endorsement or signing of a deliverable, a document or a high-level review meeting. An example of a milestone is "Select talent management vendor."

### Configuration

The following product setting must be set.

Product Settings		
Setting Name	Description	Location
Enable Goals Management	Enables Goals Management functionality in the application for employees. The activation of this setting does not enable business goals, which are enabled by a specific setting.	Configuration > [Taleo Performance] Settings

The following user type permissions must be granted.

User Type Permissions		
Permission Name	Description	Location
<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. If restricted viewing permission is required, select the applicable constraints.	<b>Configuration &gt; [SmartOrg] Administration &gt; [Users] User Accounts</b>
<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. If restricted managing permission is required, select the applicable constraints.	<b>Configuration &gt; [SmartOrg] Administration &gt; [Users] User Accounts</b>
<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>Configuration &gt; [SmartOrg] Administration &gt; [Users] User Accounts</b>

## Goal Alignment

Alignment is a loose concept, but one that allows the organization visibility into how employees are directing their efforts.

There are multiples types of goal alignment supported by the system:

- Business Goal to Theme
- Project to Business Goal
- Business Goal to Business Goal
- Employee Goal to Business Goal
- Employee Goal to Employee Goal

In all of the above cases, the notion of alignment is to show that the subordinates' efforts are in support of the goal being aligned with. Alignment also provides the employees insights as to how their efforts benefit the organization. For example, for a Business Goal of “Increase Operational Efficiency 5%” a call center employee might have a Goal of “Resolve 80% of first level support calls within 5 minutes.

“Employee to Project” alignment is unique within the system. When an employee is aligned with a project, that means his efforts directly contribute to the completion of the project. In other words, the Project cannot be considered 100% complete until the Employee's goal is 100% complete.

Alignment refers to business objects (initiative, business goals, theme) on which the employee goal is aligned. Sub-goal refers to the hierarchical relationship between two employee goals. By “aligning” an employee goal to its manager goal, you not only set the hierarchical relationship between these two goals, but you also align the sub-goal to the same business objects the parent goal is aligned to. That's why the alignment library not only displays the business objects, but also your direct manager's goals.



**Note:** You can filter the Talent Browser to see who has or is aligned to goals, by selecting a business period and related goal. This allows business leaders to quickly see who in their organization is aligned to their goals and provides information on who is supporting a goal they have and how far down it is cascaded.

## Displaying the List Mode

You can display your employee goals, business goals or projects using the list mode. The list mode is the default view for employee and business goals and provides a list of items with information on key dates and progress.

**Performance > [Navigation bar] Goals**

**Performance > [Navigation bar] > More dropdown > My Projects**

**Performance > [Navigation bar] > More dropdown > Business Goals**

**Performance > [Navigation bar] Goals**

1. Click the list icon.

You now view all your items in the form of a list.

You can also view the items in card or timeline modes.

## Displaying the Timeline Mode

You can display your employee goals, business goals or projects using the timeline mode. The timeline mode provides a timeline view of an item's start and due dates.

**Performance > [Navigation bar] Goals**

**Performance > [Navigation bar] > More dropdown > My Projects**

**Performance > [Navigation bar] > More dropdown > Business Goals**

**Performance > [Navigation bar] Goals**

1. Click the list icon.

You now view all your items in the form of a timeline.

You can also view items in list mode and card mode.

## Working with Goal Plans

### Employee Goal

An employee goal is any action or objective that an employee has the intent of attaining during a given business period. Employee goals are added to an employee's goal plan and can later be brought into the review process to be rated.

All employee goals are listed under the Goals tab of the goal plan, separated from the competency goals, which are listed under the Competencies tab.

Employee goals are added to an employee's goal plan by either creating them manually, from scratch, or via alignment to an existing goal. Once employee goals are added to the goal plan, their progress can be updated and they can be brought into the review process to be rated, and also to show up in the Talent Profile.

Employee goals can be added to an employee's goal plan at any time and can also be removed from an employee's goal plan if no longer needed. Depending on the configuration, the organization can determine whether employees and managers have the right to edit employee goals and their associated sub-goals. Depending on user permissions, employee goals can be added, edited or deleted. Employee goals can also be assigned by managers to direct reports. Users can also solicit and provide feedback on employee goals.

## Configuration

Employee goals are enabled by default when Goals Management is enabled.

The information displayed for employee goals is dependent of the configuration of the goal plan template.

Configuration of the use of employee goals		
Setting	Description	Location
Enable Goals Management	Main product setting to enable the goal management functionality for employees.	<b>Configuration &gt; [Taleo Performance] Administration &gt; [Global Configurations] Settings</b>
Allow Employee Goals	When set to Yes (which is the default value), the goal plan will allow the use of employee goals, which are managed under the Goals tab. If set to No, employee goals will not be entitled in goal plans; therefore, the Goals tab will not be shown.	<b>Configuration &gt; [Taleo Performance] Administration &gt; [Goals Management] Goal Plan Templates Configuration &gt; [Taleo Performance] Administration &gt; [Goals Management] Goal Plan Templates</b>
Allow subgoals	Set by default to No, this setting indicates if subgoals can be created under employee goals.	<b>Configuration &gt; [Taleo Performance] Administration &gt; [Goals Management] Goal Plan Templates Configuration &gt; [Taleo Performance] Administration &gt; [Goals Management] Goal Plan Templates</b>
Goal Alignment Settings	Group of settings indicating how employee goals can be aligned, and in which situations.	<b>Configuration &gt; [Taleo Performance] Administration &gt; [Goals Management] Goal Plan Templates Configuration &gt; [Taleo Performance] Administration &gt; [Goals Management] Goal Plan Templates</b>
Goal Assignment Settings	Group of settings indicating if employee and competency goals can be assigned and in which circumstances the assignment is possible.	<b>Configuration &gt; [Taleo Performance] Administration &gt; [Goals Management] Goal Plan Templates</b>

Configuration of standard information available for employee goals				
Standard Field Name	Default Displayed Setting	Default Editable Setting	Default Propagated Setting	Default Setting for Requires Approval
Owner	Yes	Yes	No	No
Name	Yes	Yes	Yes	Yes

Configuration of standard information available for employee goals				
Standard Field Name	Default Displayed Setting	Default Editable Setting	Default Propagated Setting	Default Setting for Requires Approval
Start Date	Yes	Yes	Yes	No
Due Date	Yes	Yes	Yes	Yes
Description	Yes	Yes	Yes	Yes
Critical	Yes	Yes	Yes	Yes
Public	Yes	Yes	Yes	No
Measurement Type	Yes	Yes	Yes	Yes
Actual Value	Yes	Yes	No	No
Target Value	Yes	Yes	Yes	Yes
Initial Value	Yes	Yes	No	No
Progress	Yes	Yes	No	No
Stretch Value	No	No	No	No
Measurement Text	Yes	Yes	Yes	Yes
Status	Yes	Yes	No	No
Category	Yes	Yes	No	No
Alignment	Yes	Yes	Yes	Yes
Tasks	Yes	Yes	Yes	Yes
Task Weight	Yes	Yes	Yes	Yes
Comments	Yes	Yes	No	No
Weight	No	No	No	No
Manager Rating	No	No	No	No
Employee Rating	No	No	No	No
External Identifier	No	No	No	No
Include in Performance Review	No	No	No	No
System Administrator Goal	No	No	No	No

Configuration of user-defined information to be shown for employee goals		
Setting	Description	Location
Employee Goal User-defined Fields	Used to create the custom fields to be used.	<b>Configuration &gt; [Taleo Performance] Administration &gt; [Goals Management] Goal Plan Templates</b>
Any selected User defined fields	Can be set to be editable, propagated and to require approval if edited.	<b>Configuration &gt; [Taleo Performance] Administration &gt; [Goals Management] Goal Plan Templates</b>

## Competency Goal

Competency goals are behaviors that an employee agrees to work on over a given business period. Competency goals added to an employee's goal plan can later be brought into the review process so that rated employee goals and competencies can drive new metrics that will be leveraged throughout the application.

All competencies that are part of an employee goal plan are listed under the Competencies tab of the goal plan, separated from the employee goals, which are listed under the Goals tab.

Competencies are added to an employee's goal plan by either selecting new competencies from the list of available competencies or by automatically including the competencies from the employee's job role. Once competencies are added to the goal plan, they can be brought into the review process to be rated, to then show up in the Talent Profile.

Competencies can be added to an employee's goal plan at any time and can also be removed from an employee's goal plan if no longer needed. Depending on the configuration, the organization can determine whether employees and managers have the right to edit competencies and their associated sub-competencies. Competency definition can be edited by users and sub-competencies can be added, edited or deleted.

Like employee goals, competency goals can be assigned by managers to direct reports. Users can also solicit feedback on competency goals.



**Note:** When review-Goal synchronization is enabled, multi-selected Competency goals are added into the Review automatically.

## Configuration

Competency goals are disabled by default.

To use competency goals in goal plans, activation and configuration must be done via the goal plan template.

Configuration of the use of competency goals		
Setting	Description	Location
Enable Goals Management	Main product setting to enable the goal management functionality for employees.	<b>Configuration &gt; [Taleo Performance] Administration &gt; [Global Configurations] Settings</b>

Configuration of the use of competency goals		
Setting	Description	Location
Allow Competency Goals	If set to Yes, the employee goal plan will allow the use of competencies, which are managed under the Competencies tab. If set to No, competencies will not be entitled in employee goal plan; therefore, the Competencies tab will not be shown.	<b>Configuration &gt; [Taleo Performance] Administration &gt; [Goals Management] Goal Plan Templates</b> <b>Configuration &gt; [Taleo Performance] Administration &gt; [Goals Management] Goal Plan Templates</b>
Add Competencies from Job Role on Goal Plan Creation	If set to Yes, all competencies that are part of the employee's job role will automatically be imported in the goal plan upon creation of a new goal plan for a given business period. If set to No, competencies will not be automatically imported into the goal plan, but might still be added if competency goals are allowed	<b>Configuration &gt; [Taleo Performance] Administration &gt; [Goals Management] Goal Plan Templates</b> <b>Configuration &gt; [Taleo Performance] Administration &gt; [Goals Management] Goal Plan Templates</b>
Goal Assignment Settings	Group of settings indicating if employee and competency goals can be assigned and in which circumstances the assignment is possible.	<b>Configuration &gt; [Taleo Performance] Administration &gt; [Goals Management] Goal Plan Templates</b>

Configuration of standard information available for competency goals				
Standard Field Name	Default Displayed Setting	Default Editable Setting	Default Propagated Setting	Default Setting for Requires Approval
Owner	Yes	Yes	No	No
Name	Yes	Yes	Yes	Yes
Start Date	Yes	Yes	Yes	No
Due Date	Yes	Yes	Yes	Yes
Description	Yes	Yes	Yes	Yes
Critical	Yes	Yes	Yes	Yes
Public	Yes	Yes	Yes	No
Measurement Type	Yes	Yes	Yes	Yes
Actual Value	Yes	Yes	No	No
Target Value	Yes	Yes	Yes	Yes
Progress	Yes	Yes	No	No
Stretch Value	No	No	No	No
Measurement Text	Yes	Yes	Yes	Yes
Status	Yes	Yes	No	No
Sub-competencies	Yes	Yes	Yes	Yes

Configuration of standard information available for competency goals				
Standard Field Name	Default Displayed Setting	Default Editable Setting	Default Propagated Setting	Default Setting for Requires Approval
Comments	Yes	Yes	No	No
Manager Rating	No	No	No	No
Employee Rating	No	No	No	No
External Identifier	No	No	No	No
Include in Performance Review	No	No	No	No
System Administrator Goal	No	No	No	No

Configuration of user-defined information to be shown for competency goals		
Setting	Description	Location
Competency Goal User-defined Fields	Used to create the custom fields to be used.	<b>Configuration &gt; [Taleo Performance] Administration &gt; [Goals Management] Goal Plan Templates</b>
Any selected User defined fields	Can be set to be editable, propagated and to require approval if edited.	<b>Configuration &gt; [Taleo Performance] Administration &gt; [Goals Management] Goal Plan Templates</b>

## Goal Categories

Goal categories are now available for both Employee and Competency goals. Employees can group and organize their goals into different categories to help define each goal's purpose.

Goal categories provide the ability for employees to make their goals relevant to their organization's focus areas. Now goals can be associated to categories for the purpose of grouping and relevance. Categories display as a column on the Goal Plan page and in the Goal Details. Categories are also available in subgoals.

- The category feature is in addition to the existing goal alignment feature.
- When a goal has a category, the subgoal will inherit that category. If that category is editable, then users may change the category in the subgoal itself.
- Categories can be selected at the time of goal creation or later during goal editing.



**Note:** Performance is not delivered with predefined default categories.

## Configuration

Goal Categories must first be created before they can be enabled.

Configuration > [Performance] > Administration > [Goals Management] > Goal Categories		
Name	Description	Possible Actions
Goal Categories	Create and edit goal categories.	<ul style="list-style-type: none"> <li>• Create</li> <li>• Activate</li> <li>• Deactivate</li> <li>• Duplicate</li> </ul>

Once Goal Categories are created, they must be enabled in the Performance template to display.

Configuration > [Performance] > Administration > [Goals Management] > Goal Plan Template Management > [Goal Plan Template] > Goal Categories		
Name	Description	Possible Actions
Employee Goal Configuration	Enables Employee Goal categories.	<ul style="list-style-type: none"> <li>• Displayed</li> <li>• Editable</li> <li>• Propagated</li> <li>• Requires Approval</li> </ul>
Competency Goal Configuration	Enables Competency Goal categories.	<ul style="list-style-type: none"> <li>• Displayed</li> <li>• Editable</li> <li>• Propagated</li> <li>• Requires Approval</li> </ul>

## Goal Measurement

Enhancements have been made to make goal measurements more flexible, in turn making goals more meaningful and accurate.

Goals are not always about increasing a value, but are often about decreasing or optimizing some value. For example, a goal's objective may be to reduce overhead costs by 10 percent or to reduce the number of escalations per quarter from 50 down to 10. In these cases, the target value would be lower than the current value. The introduction of the Initial Value field supports decreasing targets and ensures accurate calculation of goal progress. Goal progress is represented as a percentage of the difference between the Initial value and the Target value.

The table defines each type of goal measurement and the values that are allowed in those measurements.

Measurement Field	Description	Allowed Values
Initial Value	Represents the beginning state of the goal. Default value is 0.	<ul style="list-style-type: none"> <li>• &lt; &gt; 0</li> <li>• &lt; &gt; Target</li> </ul>
Current Value	Represents the current state of the goal. Default value is 0.	<ul style="list-style-type: none"> <li>• &lt; &gt; 0</li> <li>• &lt; &gt; Target</li> </ul>
Target Value	Represents the desired state of the goal. Default value is 0.	<ul style="list-style-type: none"> <li>• &lt; &gt; 0</li> <li>• &lt; &gt; Initial</li> </ul>
Stretch Value	Represents a value beyond the target; over achievement. Default value is 0.	<ul style="list-style-type: none"> <li>• &lt; &gt; 0</li> <li>• &lt; &gt; Target</li> </ul>

## Configuration

The Initial Value field supports all configuration options currently available for other measurement fields.

# Employee or Business Goal Creation Through Alignment

The creation of employee or business goals through alignment provides users with an intuitive way to rapidly create goals that are in line with the key objectives of the organization or with their manager's goals and to tailor them to specific needs.

This goal creation option provides the ability to create goals in the way that many businesses work (via top-down alignment or cascading). Rather than requiring users to create goals from scratch, the creation through alignment offers the ability to select another business or employee goal and to use that goal as a “template” for creating the new goal. Key details are copied from the selected goal and the new goal is automatically aligned to the goal that was selected. The user can then personalize the goal to satisfy different objectives.

Creating goals via alignment is offered as an alternative to creating goals from scratch. Therefore, when creating a new business or employee goal, the user is prompted to select whether to create the goal from scratch or to create it through goal alignment. If users select the latter, they are provided with a dialog box allowing them to choose which business or employee goals they want to align to.

When the new goal is created from alignment to another goal, the following information is automatically entered and can be edited if needed.

- Name of the goal
- Description of the goal
- Start and due dates
- Alignment to the goal that was selected to create the current goal

## Configuration

Business goal creation by alignment is offered automatically to all users.

Employee goal creation by alignment is offered automatically to all users. However, the type of goal alignment to select from depends on the goal assignment settings defined on the goal plan template. These settings allow organizations to determine whether an employee can align to his manager's goals, his projects or the organization's business goals.

The following table lists the **Goal Alignment Settings**, found under **Configuration > [Performance] Administration > [Goals Management] Goal Plan Templates**.

Setting Name	Description
<b>Allow employees to align their employee goals to their manager's goals</b>	Setting that indicates if employees are entitled to align their goals to their manager's goals.
<b>Allow to align employee goals to projects</b>	Setting that indicates if employees are entitled to align their goals to projects.
<b>Allow to align employee goals to employee's business organization goals</b>	Setting that indicates if employees are entitled to align their goals to the organization's business goals. If possible, they can be authorized to align to any business goals, in which case, no sub-setting is required. If however, employee should only align to business goals of a specific level, the definition of the sub-setting must be done.
<b>Allow to align employee goals to business goals of business organizations that are below the employee's business organization level</b>	Sub-setting of <b>Allow to align employee goals to employee's business organization goals</b>
<b>Allow to align employee goals to business goals of business organizations that are above the employee's business organization level</b>	Sub-setting of <b>Allow to align employee goals to employee's business organization goals</b>

## Goal Creation by Copy

New employee goals can be created by copying goals from a previous or current goal plan.

The option to create new goals by copying goals provides users with the ability to quickly create goals by copying one or multiple goals from a previous or current goal plan. Once the new goals are created, users are able to modify the goal as needed.

The advantage of copying existing goals is that some goal information is already provided. For instance, this option allows employees who have the same goal year after year to copy that goal from a previous goal plan. The values that are copied are predetermined and not configurable. The following table indicates the copy behavior of each field in the Employee Goal detail page.

It is possible to copy any employee goal from any previous goal plan or from the current goal plan, with the exception of goals that are tagged as 'System Administrator Goals'. The ability to copy goals is not available for competency goals or business goals.

Field	Copied?	Comment
Owner	No	The value is defaulted to the current employee user.
Name	Yes	The value is copied from source goal.
Start Date	No	The value is defaulted to the Goal Plan period start date.
Due Date	No	The value is defaulted to the Goal Plan period end date.
Description	Yes	The value is copied from source goal.
Critical	Yes	The value is copied from source goal.
Public	Yes	The value is copied from source goal.
Measurement Type	Yes	The value is copied from source goal.
Measurement Text	Yes	The value is copied from source goal.
Actual Value	No	
Target Value	Yes	The value is copied from source goal.
Progress	No	
Stretch Value	Yes	The value is copied from source goal.
Status	No	The value is defaulted to Not Started.
Alignment	No	
Tasks	Yes	The value is copied from source goal. (if Tasks is allowed in goal plan template standard fields configuration)
Task Weight	Yes	The value is copied from source goal.
Comments	No	
Weight	Yes	The value is copied from source goal.
Manager Rating	No	The value is defaulted to None.
Employee Rating	No	The value is defaulted to None.
External Identifier	No	Value is defaulted to None.
Include in Performance Review	Yes	The value is copied from source goal.
System Administrator Goal	No	The value is defaulted to False.
Custom Fields	Yes	The values are copied from source goal.

## Configuration

First, the goal management feature must be enabled.

Product Settings		
Setting Name	Description	Location
Enable Goals Management	Enables Goals Management functionality in the application for employees. The activation of this setting does not enable business goals, which are enabled by a specific setting.	Configuration > [Taleo Performance] Settings

Then, for users to be entitled to create new goals by copying existing ones from previous goal plans, the corresponding goal plan template must be configured to allow such action.

Goal Plan Template configuration	
Setting Name	Location
Allow creating goals by copying from previous goal plans	Configuration > [Taleo Performance] Administration > [Goals Management] Goal Plan Templates - Goal Creation Options

Users must also have the permission to view and manage goals.

User Type Permissions		
Permission Name	Description	Location
Performance > Goal Plans > View	When no constraint is selected, the user has read-only access to all goal plans, current or not. If restricted viewing permission is required, select the applicable constraints.	Configuration > [SmartOrg] Administration > [Users] User Accounts
Performance > Goal Plans > Manage	When no constraint is selected, the user has write access to all goal plans, current or not. If restricted managing permission is required, select the applicable constraints.	Configuration > [SmartOrg] Administration > [Users] User Accounts

## Goal Creation using SMART Assistant

This goal creation method offers users guidelines and instructions throughout the creation process of goals.

The creation of employee goals using a wizard provides a simple, step-by-step option that allows employees and managers to easily create goals following a defined and logical process. With the SMART assistant, employees can successfully create and align their goals by following simple steps.

SMART methodology refers the following predefined principles:

Specific	This step allows the user to define a specific goal by entering the goal's name and description.
Measurable	This step allows the user how the goal will be measured.

<b>Achievable</b>	This step allows to user to determine whether the goal is achievable. It allows user to break goal into tasks so that it may be achieved more easily.
<b>Relevant</b>	This step allows the user to make their goal relevant by aligning it to a manager's goal or a business goal.
<b>Time-bound</b>	This step prompts user to provide realistic time constraints to successfully achieve the goal.

The goal creation assistance is offered only for employee goals. This option is not available for competency goals or business goals.

The steps included in the goal creation assistant are predetermined and not configurable. Note that the instructions fields can not be multilingual, which means that they can only be provided in one language at a time. However, the administrator may include some specific instructions and hyperlinks in the instruction area so that users may benefit from any supporting documentation.

## Configuration

First, the goal management feature must be enabled.

<b>Product Settings</b>		
<b>Setting Name</b>	<b>Description</b>	<b>Location</b>
<b>Enable Goals Management</b>	Enables Goals Management functionality in the application for employees. The activation of this setting does not enable business goals, which are enabled by a specific setting.	<b>Configuration &gt; [Taleo Performance] Settings</b>

Then, for users to be entitled to create goals using the SMART assistance, the corresponding goal plan template must be configured to allow such action.

<b>Goal Plan Template configuration</b>	
<b>Setting Name</b>	<b>Location</b>
Allow creating goals using the SMART assistant	<b>Configuration &gt; [Taleo Performance] Administration &gt; [Goals Management] Goal Plan Templates - Goal Creation Options</b>

Users must also have the permission to view and manage goals.

<b>User Type Permissions</b>		
<b>Permission Name</b>	<b>Description</b>	<b>Location</b>
<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. If restricted viewing permission is required, select the applicable constraints.	<b>Configuration &gt; [SmartOrg] Administration &gt; [Users] User Accounts</b>

User Type Permissions		
Permission Name	Description	Location
Performance > Goal Plans > Manage	When no constraint is selected, the user has write access to all goal plans, current or not. If restricted managing permission is required, select the applicable constraints.	Configuration > [SmartOrg] Administration > [Users] User Accounts

## Batch Goal Assignment

Batch goal assignment provides the ability to assign, at one time, a set of goals to large groups of people within the organization, either by selecting individuals or organizations.

Batch assignment allows managers to assign, in one single transaction, multiple goals to an unlimited number of direct and indirect reports.

The goal assignment process is as follows:

- First, the user needs to have goal assignment rights, which are indicated by the visibility of the Person icon.
- The goals to be assigned must be selected using the appropriate checkboxes.
- When a manager assigns any of their goals to other employees, he/she can do so by selecting specific employees or employees from specific organizations.
- Following the selection, a confirmation dialog displays the number of employees to whom the selected goals will be assigned to and lets you continue or cancel the assignment.
- To verify if the batch assignment was performed successfully, the **Show Process History** action shows the goal assignment status and a list of any errors that occurred in the process.

Goal assignment is not possible in two situations:

- in the case of a system-administered goal - a pop-up window will be displayed to inform the user of the nature of the goal.
- if the employee's goal plan is under approval - if the manager attempts to propagate goals to that employee, they will receive an error message letting them know that the plan is currently under approval.

When the goal assignment is successful, the selected goals are added to the goal plan of the selected employees and the related goal information is transferred as per the standard and user-defined field propagation configuration on the goal plan template. The goal alignment is maintained upon goal assignment, except when the manager's goal is aligned to their own manager's goal; in such a situation, the link is broken.

When a goal is assigned, most of the information can be propagated to the selected employees, as per the field propagation configuration. Some field values however are never propagated; these fields are:

- Owner - which is always set to the target employee name.
- Task Weight
- Comments
- Manager Rating
- Employee Rating

- System Administrator Goal - as these goals can never be assigned.

## Configuration

Although batch assignment is always allowed, one setting does determine if goals can be assigned to the direct reports of the selected direct reports - **Allow goal batch assignment to indirect reports**.

For this feature to work, managers must be allowed to assign goals.

Changing a setting on a goal plan template affects all goal plans associated to it. There is a warning message when a user wants to edit an active goal plan.

Setting	Description
<b>Allow manager to assign employee goals</b>	Main goal assignment setting. This setting must first be enabled to allows managers to assign goals.
<b>Add goal even if the employee's goal plan does not exist</b>	Sub-setting that entitles the assignation of goals even when a goal plan has not yet been created.
<b>Add goal even if the employee's goal plan is approved</b>	Sub-setting that entitles the assignment of goals even if the goal plan has been approved.
<b>Allow goal batch assignment to indirect reports</b>	Sub-setting that entitles assignment of goals to indirect reports, meaning here that the direct reports of a selected employee will also receive the assigned goal.

## Sub-Goal Functionality

Sub-goal functionality provides the ability to use sub-goals within employee goals.

With the introduction of tasks in goals, a change of functionality was required due the similarity between sub-goals and tasks. The primary difference between sub-goals and tasks is that with tasks, the progress of the goal is calculated based on the sum of the tasks. With sub-goals, this is not the case - the progress of the parent goal has no relationship with the progress of its sub-goals.

It is important to know that only one level deep of sub-goals is allowed, meaning that a goal can only have one level of sub-goal and that a sub-goal cannot have additional sub-goals.

When sub-goals are enabled and one is created, the sub-goal is automatically aligned to the parent goal; this default alignment can however be overwritten at any point.

The following list indicates the alignment behavior for all possible sub-goal actions:

- Creating a sub-goal - The sub-goal is auto-aligned to its parent.
- Updating the alignment of a sub-goal to a manager's goal - The sub-goal is moved as a main employee goal.
- Updating the alignment of a sub-goal to a business goal or project - The sub-goal is moved as a main employee goal.
- Removing the alignment of a sub-goal - The sub-goal is moved as a main employee goal.

## Configuration

By default, sub-goal functionality is disabled. A setting on the goal template determines whether the user has the ability to create sub-goals. This setting can be enabled/disabled at any time. If a given user already has sub-goals and the template is modified to disable sub-goals, the existing sub-goals will not be affected and still be displayed. However, the user will be prevented from creating any further sub-goals.

Setting	Description	Location	Path
<b>Allow subgoals</b>	Enables the ability to create sub-goals.	Goal Plan Template	<b>Configuration &gt; [Performance] Administration &gt; [Goals Management] Goal Plan Templates</b>

## Goal Related Tasks

Goal related tasks provide the ability to measure the progress of a goal by the completion of a series of tasks within the goal. Tasks are different from sub-goals in that the completion of the parent goal is calculated by determining the completion of the tasks.

Tasks provide the ability to split a goal into activities and to measure the goal progress based on the average progress of its tasks. Tasks also help to define how the goal will be achieved. Tasks can only be created as part of a goal and do not exist on their own. The fields displayed for Tasks are based on the display of fields in the goal detail. For example, if the Measurement text field is not displayed for goals, it will not appear for tasks either.

On the goal details page, the tasks are displayed in the **Measurement** section.

When a goal contains tasks, it is the progress of the tasks that need to be updated, not that of the goal, which will be updated automatically upon the progress of the related tasks. For example if there are four tasks in a goal and one is marked at 100% complete, the goal would be 25% complete. Tasks can also have weights, so the above example assumes that all tasks are weighted equally. If the completed task was weighted at 50% and the other three tasks at 16.66%, then the goal progress would be 50% complete.

When a goal plan is printed, the tasks it contains can be part of the printout if the task related print option is selected.



**Note:** It is important to know that when sub-goals are also offered, their creation is done via the pull-down menu available for each goal, in the main goal plan page

## Configuration

The visibility of tasks in goals is dependent on the configuration of the **Tasks** field in the goal plan template.

Behavior of the **Tasks** standard field:

Displayed	Editable	Propagated	Requires Approval
Main setting that needs to be set to Yes for the other settings to be available. If this setting is set to Yes,	If set to Yes, tasks can be viewed, added, edited and removed.	If set to yes, the tasks will be propagated when the related goal is assigned.	If set to Yes, the goal plan will go under approval whenever a task is added or deleted.

Displayed	Editable	Propagated	Requires Approval
the Tasks section is available for viewing.			

The following table lists all the standard fields that can apply to tasks.

Standard Field in the Goal Plan Template	Applicable to tasks	Applicable to goals
Name	Yes	Yes
Description	Yes	Yes
Status	Yes	Yes
Progress	Yes	Yes
Actual Value	Yes	Yes
Target Value	Yes	Yes
Stretch Value	Yes	Yes
Measurement Text	Yes	Yes
Start Date	Yes	Yes
Due Date	Yes	Yes
Task Weight	Yes	



**Note:**

It is important to know that sub-goals are still supported. However, it is not recommended to use both as it could be confusing for the users. By default, the ability to create sub-goals is disabled. In addition, the goal plan template contains a setting that controls the availability of goals - **Allow subgoals**.

## Goal Plan Approval

Goal plan approval is always required whenever a goal plan is created or when certain information is modified. The approval is performed according to the approval workflow defined on the corresponding goal plan template.

Goal fields identified as requiring approval can be read-only when a goal plan is under approval. Trying to edit them leads to an error message being displayed. To avoid that, if the required configuration setting is enabled, the current approver for the goal plan can make changes to those fields without affecting the approval process.

The current approver can also add and delete goals from the goal plan in this instance. In a single approver workflow this removes the redundant step of the approver effectively having to restart an approval process for a change he made, which will only return him to the same stage in the process, but with additional steps added.

When a change is made to an already approved goal plan and if the change requires the plan to be approved again, the status of the plan may automatically go from Approved to Not approved, and thus go through the entire approval workflow again.

A change to the following fields constitute a goal definition change and requires the goal plan to be reapproved if it was already approved:

- Goal Name
- Owner
- Due Date
- Description
- Critical
- Measurement Type (Qualitative or Quantitative)
- Measurement Text
- Target Value
- Stretch Value
- Weight
- Alignment

The information regarding approval status is front and center. The user can clearly see the current status and why it is in that status, along with what actions will progress it along the approval workflow. This includes identifying whether parts of the goal plan can be edited and how it affects its current status.

The actions are dependent on your relationship to the goal plan. For instance, if you are an approver and the goal plan status is *Approval in Progress*, then you will have Approve and Reject options displayed. Conversely, if you are the goal owner, and the goal plan is under approval, you are informed of the date the goal was submitted for approval. It also informs you of any limitations related to editing the goal plan during the approval process.

## Printable Employee Goal Plan

A PDF version of an employee's goal plan is offered to provide a printable version of the goal plan for a given period. The printout can show all the information about the goals in the plan or just the some of the goal information.

The printable version is offered to employees to print their own goal plan as well as to managers to print their employees' goal plans by simply clicking on the print icon.

Print options are available to specify which information is to be shown on the printout - Employee Information and Goal Details are always printed and cannot be defined otherwise.

The available print options are dependent on the fields that are set to be displayed on the goal plan template. For instance, if the Comments standard field is not set to be displayed, the Comments print option will not be available for selection.

Print Options	Description
Employee Information	Always printed and includes the name, the ID and the manager of the employee, which are taken from the Talent Profile.

Print Options	Description
Goal Details	Always printed and includes the name and the description of the employee goal or competency goal, as well as its start and due dates, status and related options (Critical, Public, Included in Review).
Measurement	Shows the actual, target and stretch values of the progress of the goal, the progress percentage as well as any specified measurement text, provided the Measurement text, Target value, Stretch value, Actual value and Percentage complete standard fields in the goal plan template are set to be displayed.
Tasks	Shows the tasks that are associated to the employee goal, with their respective start and end dates, weight, and progress percentage, provided the Tasks and Task Weight standard fields in the goal plan template as set to be displayed.
Alignment	Shows the goal the employee goal is aligned to, provided the Alignment standard field in the goal plan template is set to be displayed.
Additional Information	Shows all the user-defined fields selected to be displayed in the goal plan template for employee goals, along with their corresponding values.
Comments	Shows any comment provided about the employee or competency goal, provided the Comments standard field in the goal plan template is set to be displayed.
Rating	Shows the employee and/or manager rating given to the employee or competency goal, provided the Manager rating value and the Employee rating value standard fields in the goal plan template are set to be displayed.
Sub-competencies	Shows the list of sub-competencies associated with the competency goals in the goal plan, if there are any.

## Creating an Employee Goal

Creating an employee goal provides the ability to define a goal plan on which to work on and to later align those goals to the business goals of your organization and to include them, if desired, in performance review to be evaluated.

### Performance > [Navigation bar] Goals

#### Performance > [Navigation bar] Goals

1. If a goal plan has never been created for the selected employee and business period, click **Create** to create the goal plan. Note that the **Create** button only appears the first time a plan is created.
2. In the **Goal Plan** page, select the **Goals** tab and click the plus icon.
3. In the **Create a new goal** window, specify how you want to create the new goal:
  - o If you select **Create a new goal through alignment to an existing goal**, click **Next** to select the goal to align to.
  - o If you selected **Create manually**, click **Next** to enter basic information about the goal.
  - o If you select **Create a goal by copying from a previous goal plan**, click **Next** to select the goal to be copied.
  - o If you select **Create a goal by using the SMART assistant**, click **Next** to go through the assistant by specifying the requested information for each step.
4. Click the Disk icon to save when complete.

The new employee goal is displayed on the **Goal Plan** page, under the **Goals** tab.

Once the goal has been created and defined, the related goal plan usually needs to be approved.

You can quickly create another goal right from the current goal page, by clicking the plus icon and repeating the enumerated steps.

## Creating an Employee Goal from Scratch

Creating an employee goal from scratch provides the ability to entirely create a new goal manually.

### Performance > [Navigation bar] Goals

#### Performance > [Navigation bar] Goals

1. If a goal plan has never been created for the selected employee and business period, click **Create** to create the goal plan. Note that the **Create** button only appears the first time a plan is created.
2. In the **Goal Plan** page, select the **Goals** tab and click the plus icon.
3. In the **Create a new goal** window, select **Create manually** and click **Next**.
4. In the next window, enter at the least the name of the new goal. You can also enter a description. The start and end date of the goal are by default set to the first and last day of the current year. The dates can be changed by simply selecting other dates.
5. Once the basic goal information is provided, click **OK** to be taken directly to the goal detail page, where you can enter additional goal information.
6. If you make any information change, click the Disk icon to save.

The new employee goal is displayed on the **Goal Plan** page, under the **Goals** tab.

Once the goal has been created and defined, the related goal plan usually needs to be approved.

You can quickly create another goal right from the current goal page by clicking the plus icon and repeating the enumerated steps.

## Creating an Employee Goal via Alignment

Creating an employee goal by alignment provides the ability to duplicate a goal that will be automatically aligned to another goal.

### Performance > [Navigation bar] Goals

#### Performance > [Navigation bar] Goals

1. If a goal plan has never been created for the selected employee and business period, click **Create** to create the goal plan. Note that the **Create** button only appears the first time a plan is created.
2. In the **Goal Plan** page, select the **Goals** tab and click the plus icon.
3. In the **Create a new goal** window, select **Create a new goal through alignment to an existing goal** and click **Next**.
4. In the next window, specify the type of element you want to align to, either a business goal, a project of one of your manager's goals.
5. Once the alignment category is specified, select the specific goal or project you want to align and copy from.
6. Click **OK** to be taken directly to the goal detail page, where you can enter additional goal information or edit the information copied from the alignment.
7. If you make any information change, click the Disk icon to save.

The goal detail page will show that the goal is automatically aligned to the selected goal or project and the new employee goal is displayed on the **Goal Plan** page, under the **Goals** tab.

Once the goal has been created and defined, the related goal plan usually needs to be approved.

You can quickly create another goal right from the current goal page by clicking the plus icon and repeating the enumerated steps.

## Creating an Employee Goal by Copying Another Goal

Goals can be created by copying other goals; you can create one goal at a time, or copy multiple goals from one goal plan.

You need to have view and manage access to goals, with the proper constraints. A goal plan might already exist. The related goal plan template allows this action.

### Performance > [Navigation bar] Goals or Performance > [Navigation bar] Goals

1. From the **Goal Plan** page, click the Plus icon.
2. In **Create a new goal** window, select **Create a goal by copying from a previous goal plan** and click **Next**.
3. In the **Goal Selector** window, specify the business period of the goal plan to choose from and click **Refresh** to load the related goals.
4. Select the goals that you want to copy by placing a checkmark beside each one.  
If the list of goals scrolls over multiple pages, you can select goals on various pages and they will all be added.
5. Once the selection of goals is complete, click **Select**.

The system creates the goals, adds them to the current goal plan and populates their content based on the selected goals. If you selected only one goal to copy, the system navigates to the goal details. Otherwise, you are brought to the goal plan.

Edit the newly added goal information as needed.

## Creating an Employee Goal using the Assistant

You need to have view and manage access to goals, with the proper constraints. A goal plan might already exist. The related goal plan template allows this action.

### Performance > [Navigation bar] Goals or Performance > [Navigation bar] Goals

1. From the **Goal Plan** page, click the Plus icon.
2. In **Create a new goal** window, select **Create a goal by using the SMART assistant** and click **Next**.
3. In the **SMART Goal Creation** window, go through the assistant by specifying the requested information for each step.

If any field in the assistant is grayed out, it means that the related goal plan template does not allow users to edit this information. As the Name, Start Date and End Date fields are mandatory to create a goal via the assistant, if any of those three fields are not editable, the creation process will be blocked and only canceling the creation will close the assistant window.

- a. In the **Specific** step, you must at least provide a name for the goal. Click Next when done.  
The following fields can be displayed.
  - Name - Always displayed no matter the standard field configuration. In order to complete this step, since the Name is mandatory, you need to fill in at least this field in order to go to the next step.
  - Description - Displayed if the standard field configuration indicates Displayed AND Editable.
- b. In the **Measurable** step, specify the target measure you wish to attain with this goal. The required fields differ depending on the goal measurement type (qualitative or quantitative). If no target values are needed, uncheck the option selected by default. Click Next when done.

If the goal is qualitative, there is no mandatory field. However, if the goal is quantitative, the Actual and Target values are required when configured to be displayed and editable in the goal plan template. The Measurement Text is never required.

- c. In the **Achievable** step, decide whether you want to break the goal into tasks. If so, click **Add Tasks** and enter at least one task. If not, just go to the next step. When all task names are entered, click Next.  
Only the name of tasks are entered via the assistant; the details are provided once the goal is created. If the Tasks field is configured not to be displayed and/or not to be editable, the **Add Tasks** button will be disabled and you will not be entitled to break down the goal into tasks.  
In you decide that you don't want tasks after all, you will need to delete each task you created.
  - d. In the **Relevant** step, decide whether you want to specify how the goal relates to other goals by aligning it. If so, click **Align....** In the **Alignment** window, select the goal category, if applicable and the specific goal you want to align to and click OK.  
The available object types to align to, such as manager goals, business goals, and business projects, are determined by the goal plan template settings.  
If the alignment fields are disabled, the step will be displayed but will not be available.
  - e. In the **Time-bound** step, you must specify start and end dates for the goal.  
By default, the start and end dates of the related goal plan are provided.
  - f. At any time, you can use the **Previous** and **Next** buttons to navigate to specific steps of the assistant to review and/or edit information.
4. Once all steps are completed, click **Finish** to complete the creation process and add the goal to the goal plan.

The system creates the goal, and tasks if applicable, and populates its content based on provided information. The goal is added to the goal plan.

As needed, access the goal detail page to edit existing information or to add more information.

## Including an Employee Goal in a Performance Review

Including a goal in a performance review is done when you want a goal to be part of a performance review and therefore be evaluated.

1. Open an employee goal.  
If an employee goal plan has never been created, a message appears indicating that there is no plan for the employee and business period combination and asking whether you want to create one. If so, click Create. Note that the Create button only appears the first time a plan is created.
2. In the **Goal Plan** page, under the **Goals** tab, select the goal that you want to be part of the performance review.
3. In the goal detail page, under the **Specifications** section, check the **Include in Performance Review** option.
4. Click the Disk icon to save.

The next time this employee's review will be generated, it will include the specified goal.

## Creating an Employee Sub-goal

You can create sub-goals for any existing employee goals.

A employee sub-goal can only be created for an existing employee goal.

**Performance > [Navigation bar] Goals**

### Performance > [Navigation bar] Goals

1. In the **Goal Plan** page, under the **Goals** tab, select the employee goal for which you want to create a sub-goal and click the right arrow icon to select **Add Employee Subgoal...**
2. In the **Create a new goal** window, enter the basic information about the new sub-goal.
3. Click OK to display the goal detail page.
4. Provide extra information as required and click the Disk icon to save when complete.

The new employee sub-goal displays in the goal list by clicking the arrow beside the parent goal.

## Creating a Task Related to an Employee Goal

Creating tasks provides the ability to break a goal into tasks, for which progress will determine the progress of the related goal.

Tasks can only be created for an existing goal.

The permission to create tasks is not offered for all goal plans. The display of the **Break Goal In Tasks** button indicates that this feature is enabled.

### Performance > [Navigation bar] Goals

### Performance > [Navigation bar] Goals

1. In the **Goal Plan** page, under the **Goals** tab, select the employee goal for which you want to create tasks.
2. In the goal detail page, scroll to the **Measurement** section and click on **Break Goal In Tasks**.  
If tasks already exist, click on **Create...**
3. In the **Create Task** window, provide the task information.  
If you want the progress of the task to be used to calculate the progress of the related goal, make sure to check the **User actual/target values to measure progress** option.
4. If you want to create another task, click **Save and Create Another** and repeat the previous step.
5. When task creation is complete, click **OK**.

All tasks created for a goal are displayed in the **Measurement** section, under **Tasks**.

## Adding a Competency to a Goal Plan

Adding a competency to a goal plan provides the ability to set the improvement of this competency as a goal for the given business period.

The use of competency goals depends on the configuration of the goal plan template. The display of the **Competencies** tab in the goal plan page indicates competency goals are allowed.

### Performance > [Navigation bar] Goals

### Performance > [Navigation bar] Goals

1. If a goal plan has never been created for the selected employee and business period, click **Create** to create the goal plan. Note that the **Create** button only appears the first time a plan is created.
2. In the **Goal Plan** page, select the **Competencies** tab and click the plus icon.

3. In the **Competency Selector** window, select the competency or competencies to add to the goal plan.
4. Click **Select**.
5. Provide the competency goal detail information.
6. Click the Disk icon to save when complete.

The competency is added to the goal plan, under the **Competencies** tab.

## Creating a Sub-competency Goal

This task allows the user to add an extra behavior for a specific competency goal in his goal plan.

The goal plan template has been configured to display and edit sub-competencies.

### Performance > [Navigation bar] Goals

#### Performance > [Navigation bar] Goals

1. If a goal plan has never been created for the selected employee and business period, click **Create** to create the goal plan. Note that the **Create** button only appears the first time a plan is created.
2. In the **Goal Plan** page, select the **Competencies** tab and select the competency to which you want to add a sub-competency.
3. In the **Competency Goal** page, scroll to the **Sub-competencies** section and click **Add**.
4. In the **New Sub-Competency** window, enter the description of the behavior to be considered as a sub-competency.
5. Click **Done**.
6. Click the Disk icon to save when complete.

## Showing Goal Instructions

The display of the goal instructions allows users to understand what is expected from them in terms of goal management tasks. The same instructions apply to all the goals within the same goal plan.

Goal instructions must have been defined for them to show in the goal plan. If no goal instructions were created, the actions to show or hide the instructions will not be available.

### Performance > [Navigation bar] Goals

#### Performance > [Navigation bar] Goals

1. To show the goal instructions, select the **Show Instructions** option from the **More Actions** pull-down menu or simply the Show Instructions button if you are on the goal detail page.  
The instructions will be displayed in the top section of the window. If the instructions are not available in your language, they are displayed in the base language of your system.
2. To hide the instructions, simply click the X at the right end of that section.

## Editing Goals

Whether before, during, or after the goal plan approval process, goals can be edited, deleted and removed from goal plans.

Before a goal plan has been approved, there are typically no restrictions as to what you can edit.

When you select a goal in an approved goal plan, the fields that require re-approval if edited are indicated. When changes are made it is clearly identified why the goal plan status has changed to Not Approved, in the goal plan history and then the subsequent goal detail history.

When the system is configured for it, the current approver for the goal plan can make changes to fields that typically require re-approval without affecting the approval process. The approver can also add and delete goals from a goal plan that is under approval when the setting is enabled.

## Editing an Employee Goal or Sub-goal

**Performance > [Navigation bar] Goals**

**Performance > [Navigation bar] Goals**

1. Access the desired goal plan by selecting the appropriate business period.
2. In the **Goal Plan** page, select the **Goals** tab and then select the goal or subgoal you want to edit from the list of goals.
3. In the goal detail page, make your changes and click the Disk icon to save.
4. When the confirmation window appears, click **OK**.

Your changes are saved and the status of the related goal plan might change depending on the configuration of the employee goal changes needing approval. So, if a certain goal change has been configured to need approval, then the goal plan will return to a Not Approved status following such a change.

## Editing a Sub-competency Goal

The goal plan template has been configured to display and edit sub-competencies.

**Performance > [Navigation bar] Goals**

**Performance > [Navigation bar] Goals**

1. In the **Goal Plan** page, select the **Competencies** tab.
2. Select the competency related to the sub-competency to be changed.
3. Mouse over the desired sub-competency and select **Edit**.
4. Make your changes and click **Done**.
5. Click the Disk icon when complete to save the new information.

## Editing a Task Related to an Employee Goal

Tasks can only be edited when the goal plan is under approval if you are the current approver and the required configuration setting is enabled.

**Performance > [Navigation bar] Goals**

**Performance > [Navigation bar] Goals**

1. In the **Goal Plan** page, select the **Goals** tab and then select the goal for which you want to edit a task.
2. In the goal detail page, scroll to the **Measurement** section, under **Tasks**.
3. Click the right arrow icon to select the **Edit** action.
4. In the **Edit Task** window, make the desired changes and click **OK**.

The task will reflect the changes made.

If the change made requires the plan to be re-approved, an approval request will need to be performed.

## Deleting a Task Related to an Employee Goal

Tasks cannot be deleted if the related goal plan is under approval, unless you are the current approver and the required configuration settings have been enabled.

**Performance > [Navigation bar] Goals**

**Performance > [Navigation bar] Goals**

1. In the **Goal Plan** page, under the **Goals** tab, select the employee goal for which you want to delete a task.
2. In the goal detail page, scroll to the **Measurement** section, under **Tasks**.
3. Click the right arrow icon next to the desired goal to select the **Delete** action.
4. In the confirmation box, click **Yes** to confirm the deletion.

The task will be deleted from the list of tasks.

## Removing a Goal or Sub-goal

**Performance > [Navigation bar] Goals**

**Performance > [Navigation bar] Goals**

1. In the **Goal Plan** page, select the **Goals** or **Competencies** tab, depending on the type of goal to remove.
2. Hover over the goal you wish to remove and click the right arrow icon to select **Remove...**
3. In the confirmation window, click **Yes** to confirm the action.

The goal or sub-goal is no longer displayed in the Goal Plan.

## Removing a Sub-competency Goal

The goal plan template has been configured to display and edit sub-competencies.

**Performance > [Navigation bar] Goals**

**Performance > [Navigation bar] Goals**

1. In the **Goal Plan** page, select the **Competencies** tab.
2. Select the competency related to the sub-competency to be removed.
3. Mouse over the desired sub-competency and click **Remove**.
4. Confirm the deletion.
5. Click the Disk icon when complete to save the goal plan.

## Assigning a Goal to a Direct Report

Assigning one or multiple goals to direct reports allows managers to easily and quickly propagate one or multiple employee or competency goals to their direct reports.

For this functionality to be possible, you need to be a manager and goal assignment settings need to have been set to allow the manager to assign goals. When such permission is granted to a manager, the related goal assignment icon will be displayed.

**Performance > [Navigation bar] Goals**

**Performance > [Navigation bar] Goals**

1. In the **Goal Plan** page, select the **Goals** or the **Competencies** tab, depending on the type of goal to assign.

2. Select the goals to be assigned and click the Person icon.
3. In the **Goal Assignment** window, select the employees to whom you want to assign the selected goals by first selecting the type of employees that being **Specific employees** or **Employees from specific organizations**.
4. Click the plus icon to open the corresponding selector.
5. Depending on the selector:
  - o In the People Selector, select the specific employees either in your direct reports or by performing a keyword search. Make sure to click the right arrow icon to move your selections in the **Selection** section.
  - o In the Organization Selector, choose one or multiple organizations in the list or perform a keyword search. Click **Select**.
6. Once your selections of employees to whom you want to assign goals to is done and back on the **Goal Assignment** window, click **OK**.
7. When the confirmation message is displayed, click **OK**.

Note that goals cannot be added to an employee's goal plan if the employee's goal plan is under approval. If the manager attempts to propagate goals to that employee, a window displayed listing the employees for whom the goal could not be assigned and why.

The assigned goal will show in the goal plan of the selected employees and will display the information that was set to be propagated. Goals might also be assigned to sub-direct reports and sub-organizations, if so defined. If Alignment was set to be propagated, vertically assigned goals - those from a manager to a direct or indirect report - are automatically aligned to the manager's goal. When a manager assigns a sub-goal to an employee, the employee's new goal is not aligned to that sub-goal. It will be aligned to the manager's main goal, which that sub-goal was associated with. If a goal is assigned upwards, i.e., from an employee to a manager, then the alignment is not automatically propagated.

## Aligning an Employee Goal

Aligning an employee goal allows you to demonstrate your efforts in support of a business project or a business goal of your organization or one of the employee's manager goal.

A employee goal can be aligned to only one business goal, business project or manager goal.

**Performance > [Navigation bar] Goals**

**Performance > [Navigation bar] Goals**

1. In the **Goal Plan** page, select the **Goals** tab and click the name of the goal or sub-goal you wish to align.
2. In the goal detail page, scroll to the **Alignment** section and click **Align....**
3. In the **Alignment** window, select the category of the item you wish to align the goal to and select the desired item from the list of corresponding goals or projects.
4. Click OK to perform the alignment and return to the goal detail page.

A hierarchal view of the goal alignment is now displayed in the **Alignment** section.

## Changing the Alignment of an Employee Goal

The alignment of an employee goal is changed to modify the item the goal is aligned to.

**Performance > [Navigation bar] Goals**

## Performance > [Navigation bar] Goals

1. In the **Goal Plan** page, under the **Goals** tab, click the name of the goal or sub-goal for which you want to change the alignment.
2. In the goal detail page, scroll to the **Alignment** section and click **Clear** to remove the existing alignment.
3. You need to click the Disk icon to save before proceeding to the new alignment.
4. Click **Align...**
5. In the **Alignment** window, select the category of the item you wish to align the goal to and select the desired item from the list of corresponding goals or projects.
6. Click **OK** to perform the alignment and return to the goal detail page.

A hierarchal view of the new goal alignment is now displayed in the **Alignment** section.

## Entering Goal Comments

Goal comments can be entered by both the manager and the employee on an any goal in the goal plan. However, each user is entitled to modify or remove their own comments, and not the comments entered by the other party.

To take advantage of this feature, the Comments field must be set to be displayed and editable in the goal plan template; otherwise, the Comments section will just not be shown in the goal detail page.

### Performance > [Navigation bar] Goals

### Performance > [Navigation bar] Goals

1. In the **Goal Plan** page, select the Goals or Competencies tab, depending on the type of the goal and then select the goal for which you want to enter comments.
2. In the goal detail page, scroll to the **Comments** section and click **Add**.
3. In the **Add Comment** window, enter and format your comment text and click **Done**.

Repeat this step for each comment to be added.

All comments are displayed under the **Comments** section of the goal detail page, with the latest one showing at the top of the list.

Comments can be edited and removed as needed by the author of the comment.

## Editing Goal Comments

Goal comments can only be edited by the user who originally created the comment.

To take advantage of this feature, the Comments field must be set to be displayed and editable in the goal plan template; otherwise, the Comments section will just not be shown in the goal detail page.

### Performance > [Navigation bar] Goals

### Performance > [Navigation bar] Goals

1. In the **Goal Plan** page, select the Goals or Competencies tab according to the type of the goal and select the goal for which you want to edit comments.
2. In the goal detail page, scroll to the **Comments** section and hover the comment you want to edit to see the **Edit** and **Remove** buttons appear.
3. Click **Edit**.

4. In the text editing box, edit the comment and click **Done**.

The edited comment will be displayed under the **Comments** section of the goal detail page, in the same order as the original comment.

Comments can be edited and removed as needed.

## Removing Goal Comments

Goal comments can only be removed by the user who originally created the comment.

To take advantage of this feature, the **Comments** field must be set to be displayed and editable in the goal plan template; otherwise, the **Comments** section will just not be shown in the goal detail page.

**Performance > [Navigation bar] Goals**

**Performance > [Navigation bar] Goals**

1. In the **Goal Plan** page, under the Goals or Competencies tab, select the goal for which you want to edit comments.
2. In the goal detail page, scroll to the **Comments** section and hover the comment you want to remove to see the **Edit** and **Remove** buttons appear.
3. Click **Remove**.
4. Confirm the removal by clicking Yes in the confirmation popup.

The removed comment will no longer be displayed under the **Comments** section of the goal detail page.

## Goal and Task Quick Progress Update

The progress of business goals, employee goals and tasks can be quickly updated right from the goal or task list, providing a quick method to update the completion progress of goals and tasks.

In addition to being able to update the progress via the goal or task detail page, users can also indicate the progression of their goals directly from the list page and the progression of the tasks related to a goal from the list of tasks in the goal details page, via the Progress column.

The progress column displays a Start button when the goal or task status is Not Started and shows a progress bar when the status is other than Not Started. Clicking on the Start button updates the status to In Progress. The progress of a goal is updated by clicking on the down-arrow of the progress bar, which displays a small drop-down window that is different depending on the situation:

- If the measurement type of the goal or task is Qualitative - The progress is updated using a progress slider.
- If the measurement type of the goal or task is Quantitative - The progress is updated by entering the Actual and Target values. If the progress slider is used, it will update the Actual value.
- If the goal includes tasks - The progress cannot be updated directly from the goal list as the goal's progress is dependent on the progress of the tasks, which however can be updated directly from the list of tasks within a goal's detail page.

## Configuration

Goal and task progress update is offered automatically without any configuration.

## Updating the Progress of a Goal

The progress of a goal can be updated via the goal detail page or right from the list of goals in the goal plan, under the **Goals** or **Competencies** tab.

**Performance > [Navigation bar] Goals**

**Performance > [Navigation bar] Goals**

1. In the **Goal Plan** page, under the **Goals** or **Competencies** tab, locate the goal for which you want to update the progress.
2. In **Progress** column, click **Start** if the progress has never been updated; otherwise, click the right arrow icon to open the small pop-up showing the progress fields that can be updated.
3. Update the progress using the progress slider or the value fields.
4. Click the print icon.

The goal progress will be updated as entered and will also show in the goal detail page.

## Viewing Goal Plan Changes

Viewing goal plan changes provides the ability to see the details of all changes made to the goals included in the selected goal plan. It is also possible to see the exact goals that were modified by selecting the flagging option.

For the flagging option to display, the goal plan must have been approved at least once and changes made since.

**Performance > [Navigation bar] Goals**

**Performance > [Navigation bar] Goals**

1. In the **Goal Plan** page, check the **Flag added/modified goals since last approval** option if you want to see which goals were changed and if that option is available.
2. Under the **History** tab, if you have used the flag option, specify whether you want to display all events or just the new events since the last approval to see the appropriate list of events; otherwise, the events will all be listed.

## Requesting Approval

Both the employee and the employee's manager can access the employee's goal plan and create goals. A manager can edit and delete goals created by the employee. Both users must indicate their acceptance of the plan before it is considered approved.

**Performance > [Navigation bar] Goals**

## Performance > [Navigation bar] Goals

1. In the **Goal Plan** page, review the employee and competency goals and select **More Actions > Request Approval**.
2. In the confirmation window, click **OK**.

The approval request is sent to the defined approvers, as defined in the approval workflow, and will show in the recipients' task list.

## Approving via Email Requests

Your implementation uses approval request emails with variable links to either development plans, goal plans, performance reviews, or succession plans.

1. Open the email and click the hyper link indicating it will take you to the object requiring approval.
2. Login to Performance if required or if you are in a single sign-on (SSO) environment you will go directly to the item.

If you do not have the required security access or there is a problem with the variable link, you will be redirected to the Performance start page.

3. Select the Approval option to begin the approval process.

Approval will move the item to the next step in the approval process, while rejecting the item will require the employee to make modifications and resubmit.

## Printing a Goal Plan

The goal plan can be printed to show complete or partial goal information, as specified.

### Performance > [Navigation bar] Goals

### Performance > [Navigation bar] > More dropdown > Business Goals

### Performance > [Navigation bar] Goals

1. Open the goal plan you wish to print.
2. Click the print icon.
3. In the Print Options window, specify the information you wish to see on the printout by checking the appropriate options.
4. Click Print.

The goal plan will be opened as a PDF document.

5. Use the print function of Adobe Reader to print the document.

The goal plan is viewed as a PDF and can then be printed if so desired.

## Goals Fields and Buttons

All fields related to employee or business goals in Performance are presented in the table below, along with a description and related possible values, when predefined. Each field also indicates the type of information it applies to

and the related header. **IMPORTANT** - Since most of the fields are configurable and can be set to be shown or not, it is possible that some fields do not show for some goals.

Field	Description	Applicable to	Header
	Icon that allows a manager to assign a selected goal or sub-goal to other employees.	Goal Plans	
	Icon that displays the name of the related goal plan template.	Goal Plans	
	Icon that indicates that new feedback has been provided in regards to the goal and has not yet been read.	Goal Plans	
	Icon that indicates that the achievement of the goal is critical.	Goal Plans Business Goals	
	Icon that indicates that the achievement of the goal is overdue, since the due date of the goal is past.	Goal Plans	
	Icon that indicates that the goal or sub-goal is not aligned.	Goal Plans	
	Icon that provides access to a list of all the goals in the goal plan.	Goal Plans Business Goals	
	Icon that provides access to a timeline view of all the goals in the goal plan.	Goal Plans Business Goals	
	Icon that provides the ability to add an element (that being a goal, sub-goal, business project or business milestone, depending on the type of goal).	Goal Plans Business Goals	
	Icon that provides the ability to display the details about the selected element.	Goal Plans Business Goals	
	Icon that provides the ability to remove an element.	Goal Plans Business Goals	
	Icon that represents a business goal.	Business Goals	
	Icon that represents an employee goal.	Goal Plans	
	Icon that provides the ability to print the business or employee goal plan.	Goal Plans Business Goals	
Actual Value	Quantitative measurement field that indicates the actual	Goal Plans Business Goals	Measurement

Field	Description	Applicable to	Header
	completion of the goal, expressed as a number with or without decimals. The Progress percentage is determined according to the Actual Value over the Target Value.		
Additional Information	Title of the section that shows additional information about the goal that has been defined by the company. This section will display all user-defined fields that have been defined for the goal plan template. However, if no user-defined fields were defined, this section will be empty.	Goal Plans	Additional Information
Aligned to	Box that shows the business goals, manager's goal and/or projects the goal is aligned to.	Goal Plans	Alignment
Aligned to me	List of goals that are aligned to the selected employee.	Goal Plans	Alignment
Alignment	Title of the section that shows alignment information about the goal.	Goal Plans	Alignment
Business Theme	Business theme associated to the business goal.	Business Goals	General
Comments	Title of the section that contains comments provided in relation to the goal.	Goal Plans	Comments
Critical	Check box indicating that the achievement of the goal is critical.	Goal Plans Business Goals	Specifications
Description	Text box providing a description of the goal. The character limit is 4000.	Goal Plans Business Goals	Specifications
Due Date	Indicates the date scheduled for the goal to be achieved.	Goal Plans Business Goals	General
Employee's Rating	Slider bar that allows the employee to provide his evaluation of the achievement of the goal. The employee's rating is visible to the manager, but not editable.	Goal Plans	Rating
External Identifier	Field that can contain an alternate goal identifier.	Goal Plans	Specifications
Goal Detail History	Title of the section that shows a list of all the events that have been performed for the goal.	Goal Plans	Goal Detail History
Include in Performance Review	Indicates that the goal is automatically included in the employee's performance review	Goal Plans	Specifications

Field	Description	Applicable to	Header
	when goals are populated from the goal plan.		
Measurement	Title of the section that shows information about the measurement of the goal.	Goal Plans Business Goals	Measurement
Measurement Text	Text box that contains a description of the measurement type. The character limit is 1000.	Goal Plans Business Goals	Measurement
Measurement type	There are two measurement type can be selected in the drop-down list. Goals can be measured in a quantitative or qualitative manner. Depending on the measurement type selected, the fields in the Measurement section will be slightly different.	Goal Plans Business Goals	Measurement
Name	Name of the goal.	Goal Plans Business Goals	General
Organization	Organization associated to the business goal.	Business Goals	General
Owner	Indicates who created the goal.	Goal Plans	General
Progress	Dynamic bar that indicates the level of progression towards goal achievement.	Goal Plans Business Goals	Measurement
Public	Check box indicating that the goal is public. When this option is not selected, therefore, private, the goal cannot be seen by subordinates and therefore cannot be aligned to.	Goal Plans	Specifications
Qualitative	Goal measurement type that provides a text-based measurement.	Goal Plans Business Goals	Measurement
Quantitative	Goal measurement type that provides fields to enter a specific target to be achieved.	Goal Plans Business Goals	Measurement
Rating	Slider bar that indicates the evaluation of the achievement of the goal given by the manager. Note that when an employee is viewing his own goal, the manager's rating is not visible to the employee and the Rating bar is designed for the employee to provide his own rating.	Goal Plans	Rating
Rating	Title of the section that shows the rating information about the goal.	Goal Plans	Rating
Related Goals	Title of the section that lists all the goals	Goal Plans	Related Goals

Field	Description	Applicable to	Header
Show/Hide Line of Sight	Button that shows or hides the goal alignment hierarchy.	Goal Plans	Alignment
Specifications	Title of the section that contains other identification information about the goal.	Goal Plans	Specifications
Start Date	Indicates the date when the achievement of the goal starts and from when the progression is being calculated.	Goal Plans Business Goals	Specifications
Status	Status drop-down menu of the employee goal, which can be Not Started, In Progress, Completed and Canceled.	Goal Plans Business Goals	General
Stretch Value	Quantitative measurement field that indicates the stretch value for a goal, which could exceed the set Target Value, expressed as a number with or without decimals. Note that this value is not used to calculate the completed percentage.	Goal Plans Business Goals	Measurement
Target Value	Quantitative measurement field that indicates the level of achievement set for the goal, expressed as a number with or without decimals. The Progress percentage is determined according to the Actual Value over the Target Value.	Goal Plans Business Goals	Measurement
Weight	Field that indicates a weight for the goal. Goal weights are entered as whole numbers 0-99. The system automatically calculates the number into a percentage and both are displayed. Weights can be carried over to the performance review when goals are copied from the plan to the review.	Goal Plans	Rating

## Working with Business Goals

### Business Goals

Business Goals are qualitative or quantitative statements of an organization's intent or objectives, for example, "Increase operational efficiency 5%."

If you have Business Goal rights, you can create goals for the organization that you are a member of or for subordinate organizations.

All goals have a goal period, a “container” that typically mirrors the time period in which the organization evaluates employees. During this period, you work at achieving your goals and in most case you are expected to attain the goals within the period. A goal can, however, span multiple periods.

The Business Goals feature provides three modes: a list of goals, a goal “vCard” that allows for the rapid updating of progress, and a Gantt timeline of goal start and end dates. The Gantt view supports drag and drop functionality with regard to the goal start and end date adjustments. If you “hover” your (mouse) pointer over a goal in Gantt mode, a summary of the goal alignment, dates and progress is displayed. You can access goal details by double-clicking the goal from any of the three modes.

A business goal can be either quantitative or qualitative. In a qualitative goal, you provide a text-based measurement. For example, a goal such as “Increase employee visibility into corporate plans”, the measurement could include a description of training programs to be held and other strategies. In short, a goal does not have a detailed measurement by which success can be measured. Progress is manually entered for qualitative goals.

In a quantitative goal, you enter a specific target to be achieved. For example, in a goal such as “Reduce employee voluntary turnover by 5%”, the target is 5%. To measure progress, you must also enter a value. The variance is a percentage calculation of progress based on the actual value divided by the target value.

## Goal Creation Through Alignment

The creation of employee or business goals through alignment provides users with an intuitive way to rapidly create goals that are in line with the key objectives of the organization or with their manager's goals and to tailor them to specific needs.

This goal creation option provides the ability to create goals in the way that many businesses work (via top-down alignment or cascading). Rather than requiring users to create goals from scratch, the creation through alignment offers the ability to select another business or employee goal and to use that goal as a “template” for creating the new goal. Key details are copied from the selected goal and the new goal is automatically aligned to the goal that was selected. The user can then personalize the goal to satisfy different objectives.

Creating goals via alignment is offered as an alternative to creating goals from scratch. Therefore, when creating a new business or employee goal, the user is prompted to select whether to create the goal from scratch or to create it through goal alignment. If users selects the latter, they are provided with a dialog box allowing them to choose which business or employee goals they want to align to.

When the new goal is created from alignment to a another goal, the following information is automatically entered and can be edited if needed.

- Name of the goal
- Description of the goal
- Start and due dates
- Alignment to the goal that was selected to create the current goal

## Configuration

Business goal creation by alignment is offered automatically to all users.

Employee goal creation by alignment is offered automatically to all users. However, the type of goal alignment to select from depends on the goal assignment settings defined on the goal plan template. These settings allow organizations to determine whether an employee can align to his manager's goals, his projects or the organization's business goals.

The following table lists the **Goal Alignment Settings**, found under **Configuration > [Performance] Administration > [Goals Management] Goal Plan Templates** .

Setting Name	Description
<b>Allow employees to align their employee goals to their manager's goals</b>	Setting that indicates if employees are entitled to align their goals to their manager's goals.
<b>Allow to align employee goals to projects</b>	Setting that indicates if employees are entitled to align their goals to projects.
<b>Allow to align employee goals to employee's business organization goals</b>	Setting that indicates if employees are entitled to align their goals to the organization's business goals. If possible, they can be authorized to align to any business goals, in which case, no sub-setting is required. If however, employee should only align to business goals of a specific level, the definition of the sub-setting must be done.
<b>Allow to align employee goals to business goals of business organizations that are below the employee's business organization level</b>	Sub-setting of <b>Allow to align employee goals to employee's business organization goals</b>
<b>Allow to align employee goals to business goals of business organizations that are above the employee's business organization level</b>	Sub-setting of <b>Allow to align employee goals to employee's business organization goals</b>

## Printable Business Goal Plan

A PDF version of the business goal plan is offered to provide a printable version of all the business goals of a business organization for a given period. The printout can show all the information about all the business goals in the plan or only some goal information.

The printable version of the business goals is available by simply clicking on the print icon.

Print options are available to specify which information is to be shown on the printout - Goal Details are always printed.

Fields that show no values will not be displayed on the printout version of the business goal plan.

Print Options	Description
Goal Details	Always shows the name and the description of the goal (whether it be a goal, sub-goal, business project and milestone when the Business Projects and/or Related Goals print options are also selected) as well as its start and due dates, status, organization and criticality level.
Measurement	Shows the actual, target and stretch values of the progress of the goal, the progress percentage as well as any specified measurement text.
Alignment	Shows the theme the business goal is aligned to.
Business Projects	Shows the business projects related to each business goal in the plan.

Print Options	Description
Related Goals	Shows the other business goals that are related to the business goal.

## Creating a Business Goal

Creating a business goal provides the ability to create and define business goals to which you can later align the business projects of your organization.

To be able to create business goals, and to have the Business Goals link under the Navigation bar's More dropdown, you must have a Business Goal Administrator user type.

### [Navigation bar] > More dropdown > Business Goals

1. If a business goal has never been created for the selected organization and business period, click Create to create the goal plan. Note that the Create button only appears the first time a plan is created.
2. In the **Business Goals** page, click the plus icon.
3. In the **Create a new goal** window, specify whether you want to create a goal by alignment or from scratch, that is manually.
  - o If you selected **Create a new goal through alignment**, click Next to select the goal to align to.
  - o If you selected **Create manually**, click Next to enter basic information about the goal.
4. Click **OK** to create the goal and to display the goal detail page in order to enter further goal information.
5. Click the Disk icon to save when complete.

The new business goal is displayed on the **Business Goals** page.

You can edit the business goal or align it with other business goals, if not already aligned.

## Creating a Business Sub-goal

You can create business sub-goals and have them aligned to your business goals.

You can only create a business sub-goal for an existing business goal.

### [Navigation bar > More dropdown > Business Goals

1. In the **Business Goals** page, select the goal for which you want to create a sub-goal and click the right arrow icon to select **Add Business Subgoal....**
2. In the **Create a new goal** window, enter the basic information about the new sub-goal.
3. Click **OK** to display the goal detail page.
4. Provide extra information as required and click the Disk icon to save when complete.

The new business sub-goal is automatically aligned to the parent business goal and is displayed under the parent goal on the **Business Goals** page.

## Editing a Business Goal or Sub-goal

Editing a business goal or sub-goal allows you to make corrections to or update the item.

### [Navigation bar > More dropdown > Business Goals

1. In the **Business Goals** page, click the goal or sub-goal that you want to edit.
2. In the goal detail page, make your changes to the goal or sub-goal.
3. Click the Disk icon to save.

Your changes are saved.

## Aligning a Business Goal

You can align a business goal to a theme.

### [Navigation bar > More dropdown > Business Goals

1. In the **Business Goals** page, select the goal that you want to align.
2. In the goal detail page, scroll to the **Alignment** section and click **Align....**
3. In the **Alignment** window, select the category of the item you wish to align the goal to and select the desired item from the list of corresponding goals or themes.
4. Click **OK** to perform the alignment and return to the goal detail page.

The goal is now aligned with the selected item.

A hierarchal view of the goal alignment is displayed in the **Alignment** section.

## Realigning a Business Goal

You can realign a business goal to a different goal or simply clear the alignment association.

### [Navigation bar > More dropdown > Business Goals

1. In the **Business Goals** page, select the goal that you want to realign.
2. In the goal detail page, scroll to the **Alignment** section and click **Clear** to remove the existing alignment.
3. You need to click the Disk icon to save before proceeding to the new alignment.
4. Click **Align...**
5. In the **Alignment** window, select the category of the item you wish to align the goal to and select the desired item from the list of corresponding goals or themes.
6. Click **OK** to perform the alignment and return to the goal detail page.

The goal is now aligned with the new item.

A hierarchal view of the goal alignment is displayed in the **Alignment** section.

## Creating a Business Project from the My Projects Page

Creating a business project from the My Projects page provides you with the opportunity to assign a project owner and assign goals directly to employees working on the project. A project can be created and later aligned to a business goal or created for another project, where it becomes a sub-project.

### [Navigation bar > More dropdown > Business Goals

1. In the **My Projects** page,
  - o click the plus icon to create a first-level project, to later align, or
  - o select the project for which you want to create a sub-project and click the right arrow icon to select **Add Business Project....**
2. In the **Create a new business project** window, enter the basic information about the new project.
3. Click **OK** to create the business project and to display the project detail page in order to enter further information.

The new business project is created and added to the list of projects in **My Projects** page. If the project was created under another project, it will be automatically aligned to the parent project and will be displayed by clicking the arrow next to the project.

You can perform other tasks such as creating another project or adding a milestone for an existing project.

## Creating a Business Project from the Business Goals Page

Creating a business project from the Business Goals page offers you the opportunity to assign a project owner and assign goals directly to employees working on the project.

### [Navigation bar > More dropdown > Business Goals

1. In the **Business Goals** page, select the goal for which you want to create a project and click the right arrow icon to select **Add Business Project....**
2. In the **Create a new business project** window, enter the basic information about the new project.
3. Click **OK** to create the business project and to display the project detail page in order to enter further information.

The new business project is added as a project, under the selected goal in the **Business Goals** page.

Note that when the project is created from a business goal, the project is automatically aligned to the business goal that was selected.

## Creating a Business Sub-project

Creating a business sub-project is used to assign a project owner and assign goals directly to employees working on the project. Sub-projects can be created for business goals or any other projects.

### Performance > [Navigation bar] > More dropdown > My Projects

### Performance > [Navigation bar] > More dropdown > Business Goals

1. In the **My Projects** or **Business Goals** page, select the item for which you want to create a sub-project and click the right arrow icon to select **Add Business Project....**
2. In the **Create a new business project** window, enter the basic information about the new project.
3. Click **OK** to create the business project and to display the project detail page in order to enter further information.

When a project is created for a business goal or another project, the alignment to the parent item is automatic.

## Aligning a Project or Sub-Project

You can align a project to sub-project or to a business goal.

### Performance > [Navigation bar] > More dropdown > My Projects

### Performance > [Navigation bar] > More dropdown > Business Goals

1. In the **My Projects** or **Business Goals** page, select the business project you want to align .
2. In the business project detail page, scroll to the **Alignment** section and click **Align....**
3. In the **Alignment** window, select the category of the item you wish to align the project to and select the desired item from the list of corresponding items.
4. Click **OK** to perform the alignment and return to the project detail page.

Your project is aligned to the selected item.

## Creating a Milestone

Creating a milestone creates an element that marks the completion of a specific work package or phase. You can create milestones for business projects.

A project or sub-project need to be created before you can create a milestone and add it.

### Performance > [Navigation bar] > More dropdown > My Projects

1. In the **My Projects** page, select the project for which you want to create a milestone and click the right arrow icon to select **Add Business Milestone....**
2. In the **Create a new milestone** window, enter the basic information about the new milestone.
3. Click **OK** to create the milestone.

The new milestone is displayed below the project or sub-project.

# HR Administrators Working with Employee Goal Plans

## Viewing an Employee Goal Plan

Viewing an employee goal plan allows an HR administrator to access an employee goal plan that is pending, whether the approval has not yet been requested or the approval is in progress or has been rejected.

**Performance > [Navigation bar] > HR Admin > All Goal Plans**

1. Filter the goal plans in order to view the desired goal plan.
2. In the result grid, click the name of the corresponding employee.

The **Goal Plan** page displays and shows the goals associated to the selected employee.



# 4 Performance Reviews

## Getting Started with Performance Management

### Performance Review

A performance review is a formal record of an employee's development and performance for a specific time period. Typically, it involves a review of an employee's performance and achievements during the most recent period and the creation of a plan of action for the next period.

The performance review can include a review of goals, competencies and custom sections as defined by the organization. Custom sections can include items such as key performance indicators, development activities, survey questions, accomplishments, etc. The performance review is routed through a configurable workflow and approval cycles such that the final review becomes part of the employee's permanent employment record.

### Rating

A rating is an evaluation of an employee's result or progress regarding a goal, competency or any custom item presented in the performance review. Both the employee and the manager can provide a rating but only the manager's rating is used to calculate the overall rating of the review.

When the review form is configured by the system administrator, a rating model is defined for the overall rating of the review. A rating model is associated with each review definition and can be specific for each section and item within each section or be the same throughout the entire review form.

Users select a rating model from the list of predefined rating models, which are part of the Foundation Data needed to define a review definition.

The overall rating is composed of three elements and can be configured to be displayed or hidden. In the Performance user interface, an overall rating is available on the Summary of the review as well as on the Summary of each review section. When all components are set to be displayed, the overall rating is presented as follows:

**Overall Rating** [Hide Detailed Rating](#) Solid Performance 3 2.83

1. First, the text value of the rating - which is always displayed when the Show Overall Rating is selected. In this case, Solid Performance.
2. Then, as the second component, the numerical value of the rating, as defined in the rating model which can be configured to be shown or hidden with the Show Overall Rating as Numerical Value setting.
3. And lastly, the calculated value of the rating - which can be configured to be shown or hidden with the Show Overall Rating Value setting.

The overall rating is calculated based on the ratings and weights of each of the sections after rounding.

### Review Rating Reset

Review ratings can be reset to null at both the Review Item level and the Review Section/Overall Rating level. An eraser icon appears next to rating items that contain a value. Selecting the eraser allows users to "erase" the previously entered rating and resets that value to *0 - Not Rated Yet*. If a review item has not been rated yet, the eraser icon does not display as there would be no need to reset that item.

Resetting a rating at the Review Item level could potentially impact the Review Section/Overall rating, therefore:

- If the Review Section/Overall Rating is manually overwritten, no recalculation takes place.
- If the Review Section/Overall Rating is system calculated, the rating value is recalculated.
- If all the Review items under a section are set to *Not Rated Yet*, the Section/Overall Rating would be as well, based on the system calculation.

**Section level rating reset**

The eraser icon will appear after the user overrides the system calculated rating for a section. The user is able to click on the icon to reset the section rating value to be recalculated.

Reset the rating to the calculated value

Call out display for the eraser icon

Confirmation message

Are you sure you want to reset the rating to the calculated value?

Yes No

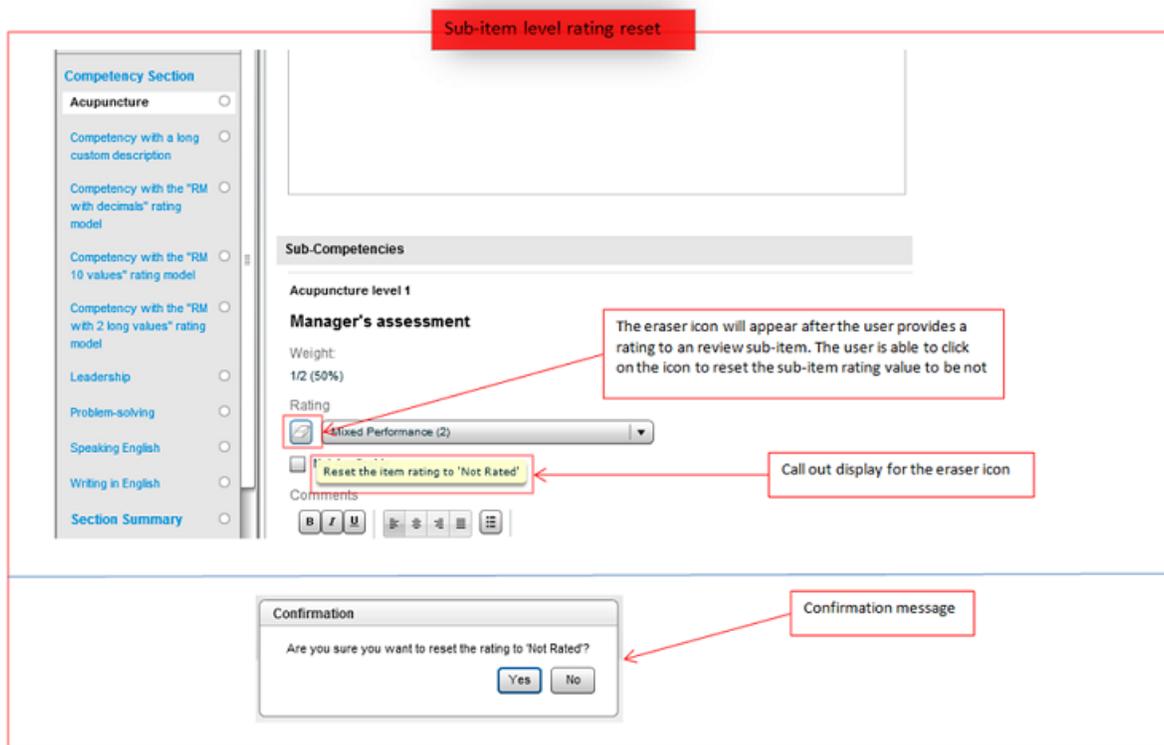
The eraser icon is also available on the overall summary view

Section	Manager assessment	Weight	Employee self-assessment	Comments
Goal Section	Rating: 3 Goal reached: the employee has reached a satisfactory	40 /100 (40%)		Add
Competency Section	- Not Rated Yet -	20 /100 (20%)		Add

At the Review Section/Overall Rating level:

- When the rating is manually overwritten, the eraser icon displays.

- Selecting the eraser icon in a Review Section/Overall Rating level resets the value to the system calculated value.
- If all child items are marked as *Not Rated Yet*, the Review Section/Overall Rating level value shows *Not Rated Yet* also.



## Review Rating Rounding Mechanism

The configuration of the review rating calculation provides two different threshold values, one for the decimal rounding and the other for the final rating value, both defined as part of the review definition and review sections.

Each threshold field is expressed as a percentage and once entered, provides dynamic examples of the possible ratings.

The Decimal Rounding Threshold is used to determine how the calculated average of all item ratings in a section and the calculated average of all section ratings will be rounded. The Rounding Interval Examples illustrate a sample result of the selected threshold for one single interval, according to the number of decimals specified.

The decimal rounding threshold process is a purely mathematical operation and in most cases, the threshold will not require any adjustment from the default value of 50%. Indeed, this value essentially corresponds to rounding up or down at the .5 limit – which is what almost every single computerized system in the world does by default. The possible configuration change that could occur for this calculation would be in the number of decimals used. Since the decimal rounding step is purely based on the raw average, the examples provided in the Rounding Interval Examples are independent of the chosen rating model.

The Rating Value Selection Threshold defines a completely different step in the process, the one of selecting the appropriate discrete business specific rating. In this case, it is common for customers to adapt the threshold (typically upwards) to meet their specific situation. For this part of the process, the rounded value mathematically calculated in the previous step is used as the input to determine which discrete rating value is appropriate, based on the numerical value associated to this value. As opposed to the examples given for the decimal rounding threshold, the Rating Value Selection Intervals shown are dependent on the associated rating model and on the number of decimals, but not on the Decimal Rounding Threshold itself.

Following are some examples to illustrate the possible rounding processes.

Let's take a review that includes three competencies that are rated 2, 3 and 4. The calculated average here is simple:  $(2+3+4)/3=3$ . The assumption being that all competencies are equally weighted and are all using the same rating model, which is established as follows:

- 1 for Poor
- 2 for Average
- 3 for Good
- 4 for Very Good
- 5 for Excellent

In another example, slightly different, we have three competencies that are rated 3, 4 and 4:  $(3+4+4)/3=3.6666666666666666$  is the raw (unrounded) average.

To determine the rounded average, the calculation will take into consideration the number of decimals and the decimal rounding threshold value. With the typical Decimal Rounding Threshold of 50%, the rounded average would be:

- Number of decimals=2: 3.6666666666666666 becomes 3.67
- Number of decimals=1: 3.6666666666666666 becomes 3.7
- Number of decimals=0: 3.6666666666666666 becomes 4
- Although it would be a very unusual implementation, using a configuration where the Number of Decimals=1 and the Decimal Rounding Threshold=75%, the raw average above would become 3.8 (since 3.6666666666666666 would be below the threshold of 3.75).

Once the rounded average has been established for items in a section and then for sections within a review, the system needs to calculate the final overall rating, which is also based on a threshold value. The Rating Value Selection Threshold value is used to determine the final rating that corresponds to the calculated rounded average.

In our example, this second threshold would determine whether the 3.7 rounded average result in a final rating of Good or Very Good.

- With a 50% rating value selection threshold, the cut off is at 3.5, so 3.7 rounds to 4 for Very Good
- However, with a 80% rating value selection threshold, the cut off is at 3.8, so 3.7 is lower so it rounds to 3 for Good
- This is the common case, as some companies do not want employees to “squeeze” into the 'Very Good' category with just barely a little more than a 'Good'/'Very Good' average.

In summary, the Decimal Rounding Threshold determines how the raw rating average is rounded to the specified number of decimals and the Rating Value Selection Threshold determines how that average is translated back to a rating of the original rating model.

## Configuration

It is suggested to evaluate some final calculations that could happen for employees and then determine what the proper overall ratings would be outside of the system, based on the number of decimals and thresholds, and to then to validate your assumptions with the results of the system.

## Review Collaboration

This feature entitles the employee, upon appropriate configuration, to have access to the performance review itself, and not to a separate self-assessment, therefore having the possibility to edit the review and collaborate with the manager until the review is completed.

The employee can collaborate with the manager in the review writing process when both the Review Contribution and the Allow employee collaboration in the main review settings are enabled. When these settings are enabled, the employee and manager share the same form, providing no distinction between a self-assessment and the manager assessment. When both the manager and the employee write in the main review, a setting indicates which is assigned the review first. The two can then send the review form back and forth to one another.

When both the employee and the manager participate in the review process, and in the same review, it is important to note that only the person who currently has the authorship may edit the review. If the review is currently assigned to the employee, the manager cannot edit the review. He will need to take the authorship back from the employee before editing. This is possible only when the employee sends the review back to the manager.

In contrast, if you prefer the employee to complete a separate self-assessment, the setting to activate is **Allow employee collaboration in the main review**.

## Configuration

The employee/manager collaboration is enabled via:

- **Configuration > [Taleo Performance] Administration > [Performance Reviews] Review Cycles** where you select a review cycle and then a review request. In the review request, in the **Process Definition** section, the following settings must be active: **Employee Contribution + Allow employee collaboration in the main review + Employee is the initial writer** or **Manager is the initial writer**
- To define what is displayed and what is editable in the review form, the related review definition settings must be set accordingly.

## Review - Goal Plan Synchronization

This enables you to keep goal and review information in sync during the initial stages of the review process, until the employee submits their self-assessment or the manager submits their review feedback.

## Calibrating Performance Reviews

Review calibration allows groups of employees to be compared and calibrated against one another in order to ensure consistency in review ratings.

Calibration is a two step process that enables higher level managers to calibrate the performance ratings of their organization's employee reviews and for those reviews to be subsequently revised to better reflect the calibrated ratings. An HR Admin user who is designated as a calibration owner for a specific performance review, will launch the calibration process, enabling an employee's initial performance review rating to be adjusted.

While a calibration owner is explicitly assigned to a review request, calibrators are not nominated and do not have tasks assigned to them. Once the calibration owner launches the calibration process, it should be done in a collaborative manner amongst high level managers and key stakeholders, making specific system tasks unnecessary. Once calibration is complete; however, tasks are sent — as typically occurs during the review process — for revising the comments for calibrated reviews.



**Note:** Per existing functionality, calibration can only be performed on populations of up to 1000 employees at a time.

**Step 1:** Ensure the correct Performance view/manage user permissions have been applied to users you want involved in calibration.

User Type Permission	
Name	Description
Performance Reviews > Access administration tools	This is required for calibration owners, as only users with this permission can be selected as calibration owners when configuring a review request. Each review can have one calibration owner associated with it. Having administration tools access also typically indicates users who are HR Administrators.
Performance Reviews > Access via Team Reviews	This is required to access the Manager's Performance Reviews screen, from where calibration is completed.
Performance Reviews > View/Manage > If this user is a higher level manager	As only HR Administrators and high level managers can calibrate, this permission is required for managers to be able to calibrate their direct report's employees.
Employee Metrics > View/Manage > If this user is a higher level manager	These are required to be able to view the employee's metrics which are used to help determine how their review scores should be calibrated.

**Step 2:** Performance Review Configuration

i. You must create a Review Request with a Process Definition that includes a Calibrate step. The Process Definition is displayed in Performance in the Performance Review Workflow tab. Calibration always begins at the same point, but there are three options available for how the steps proceed after it.

In the Process Definition Parameters, the first part of the Calibration Step (Complete Calibration) does not have correspondence associated with it. The second part (Complete Revision) does, as it is used for the Revise Employee Review task which is sent to direct managers after calibration is completed.

Configuration > [Performance] Administration > [Performance Reviews] Review Cycles > Name > Review Request > Process Definition
Name
Draft, Calibrate, Release, Acknowledge and Close

Configuration > [Performance] Administration > [Performance Reviews] Review Cycles > <i>Name</i> > Review Request > Process Definition	
Name	
Draft, Calibrate, Approve, Release and Close	
Draft, Calibrate, Approve, Release, Acknowledge and Close	

ii. A calibration owner must be selected for the review request. Calibration owners are responsible for controlling the calibration process and ensuring it is launched and completed successfully.

Configuration > [Performance] Administration > [Performance Reviews] Review Cycles > <i>Name</i> > Review Request > Properties	
Name	Description
Calibration Owner	This user should be someone who has access to all employees being calibrated. They need to have Performance Reviews > Access administration tools permission to be available for selection from the list and should have the performance review permissions listed in Step 1.

iii. You need to indicate which parts of the review definition are going to be used for calibration. If the overall performance review score is being used, these settings must be selected.

Configuration > [Performance] Administration > [Performance Reviews] Review Definitions > Settings by Rater	
Name	Description
Overall rating is used for calibration	This must be enabled so the overall score for this review definition can be calibrated. Selecting this automatically selects Allow to Override Overall Rating. Disabled by default.
Allow to Override Overall Rating	This must be enabled for Calibrator users so they can change the overall rating of a performance review. Disabled by default.

If goal or competency sections in a performance review are being used for calibration, then these settings needs to be selected.

Configuration > [Performance] Administration > [Performance Reviews] Review Definitions > Properties	
Name	Description
Section used for 'Goal Rating' metric	This must match the Goal type section used for calibration in Review Sections. A value is required here to configure charts correctly.
Section used for 'Competency Rating' metric	This must match the Competency type section used for calibration in Review Sections. A value is required here to configure charts correctly.

Configuration > [Performance] Administration > [Performance Reviews] Review Definitions > Review Sections > Settings by Rater	
Name	Description
This section is used for review calibration	This must be enabled so the score for this section can be calibrated. Selecting this automatically selects Allow to Override Calculated Section Ratings. Disabled by default
Allow to Override Calculated Section Ratings	This must be enabled for Calibrator users so they can change ratings for sections (goals or competencies) that are used for calibration. Disabled by default.

### Step 3: Overall Rating Model configuration

Ensure that the model used is consistent between the sections and the overall review rating.

Configuration > [Performance] Administration > [Performance Reviews] Review Definitions > Properties	
Name	Description
Overall Rating Model	This setting controls the rating model used for the overall review score.

Configuration > [Performance] Administration > [Performance Reviews] Review Definitions > Review Sections > Rating Models	
Name	Description
Section Rating Model	This setting controls the overall section score (Goal and Competency). Item Rating Model does not impact this setting.

### Step 4: Chart Configuration

There should be a different chart — using one of the three review ratings — associated with the Performance Review Template for each score (overall, goal section, competency section) that can be calibrated.

You must ensure you select **Allow Updates** for charts used for calibration.

When you select one of the review rating dimension types for the chart axis, you will be able to associate it with a review definition. You should ensure you select the same review definition that is used for the reviews you want to calibrate with the chart. Also, it is best to limit the number of active charts in the Performance Hub and try to use the same rating model for the calibration charts that are used for the reviews being calibrated.

Configuration > [Performance] Administration > [View Modes] Charts > Axis > Dimension Type	
Name	Description
Review - Current Review Rating	To calibrate overall review ratings, you should have a chart using this axis.
Review - Current Review Goal Rating (New)	If you are calibrating review goal section ratings, you should have a chart using this axis.

Configuration > [Performance] Administration > [View Modes] Charts > Axis > Dimension Type	
Name	Description
Review - Current Review Competency Rating (New)	If you are calibrating review competency section ratings, you should have a chart using this axis.



**Note:** When you select Review - Current Review Rating for a Dimension Type you should not include Detail Metrics > Current Review Rating in that same chart, as it means you would be displaying the same value twice.

## Performance Chart Mode

The chart mode is available to the performance review and talent pool pages. It allows you to better visualize and analyze employees, by presenting them on a bar chart using one data point (dimension or axis value), with associated detail metrics. Charts can be used for updating employee metrics, review ratings, and calibration.

The chart mode consists of a bar chart that is configured by the client. Each chart can depict the population being analyzed on a particular metric such as an employee's potential or review rating. The user can view the details of each employee to further analyze and manage the group. Each bar can be viewed in detail, to see additional metrics for each individual in that bar.

The chart mode can give access to multiple charts, depending on the charts that were made available when configuring the related template.

In the context of performance review management, charts are mainly used for analytics and to perform calibration. Calibration is done at the detail level, where each individuals in a bar is displayed in a list and can be dragged and dropped into a different bar.

The chart provides various information. First, at the top, you get information about the chart as a whole:

- **Group Average** - Indicates the average value for the metric associated with the current chart for the rated population. If there is an overridden value for the metric it is used in the calculation, otherwise the original value associated with the employee is used.
- **Company Average** - Indicates the average value for the metric associated with the current chart for the entire company. This is all employees, including those not part of the total population.
- **Total Population** - Indicates the number of individuals in the chart, including rated and unrated population.
- **Unrated Population** - Indicates the number of individuals in the chart that are not rated on the metric being analyzed and therefore not included in a bar.

Then, in the chart itself, information is provided for each bar of the chart, if so configured. Following are the possible statistics that can be displayed:

- **Count** - Indicates the number of individuals in chart when hovering.
- **Distribution** - Provides the percentage corresponding to the number of individuals in the bar over the number of individuals in the chart (the unrated population is not taken into account in the distribution percentage).
- **Benchmark** - Provides the expected distribution (as a percentage) for each bar of the chart. The benchmark is also represented by a line on the chart.

- Deviation - Indicates how far the current distribution is from reaching the benchmark. The deviation is a calculation of the current distribution versus the benchmark, based on the number of individuals in the chart (total population). It indicates how many individuals must be removed (when deviation is positive) or added (when deviation is negative) to comply with the benchmark.

Each chart can present 1 dimension, which can correspond to any of the 15 available dimensions:

- Competency Rating
- Current Review Rating
- Current Review Section Rating
- Current Review Competency Rating
- Current Review Goal Rating
- Development Overall Progress
- Goal Overall Progress
- Goal Rating
- Performance Review Rating
- Position Critical
- Potential - this metric is customizable. You select the value you want for each division during configuration and do not set thresholds.
- Promotability Readiness - this metric is customizable. You select the value you want for each division during configuration and do not set thresholds.
- Risk of Loss - this metric is customizable. You select the value you want for each division during configuration and do not set thresholds.
- Years in Management
- Years in Industry

The most common metric or dimension used for analysis is the Performance Review Rating, which is set as the bar chart axis by default.

A performance chart dimension can contain a maximum of 10 divisions or values. For example, a rating review scale can only have up to 10 levels, or divisions.

## Configuration

Charts are optional and must first be created and then added to the related template.

To have charts available in performance reviews or talent pools, they must first be created and activated. They must then be added to the performance review template or talent pool template, depending on where you want to have access to the chart view mode.

Configuration Actions	Paths
To manage existing charts and to create new ones.	<b>Configuration &gt; [Taleo Performance] Administration &gt; [View Modes] Charts</b>
To define the charts to be available to users when managing performance reviews.	<b>Configuration &gt; [Taleo Performance] Administration &gt; [Performance Reviews] Performance Review Template</b>

Configuration Actions	Paths
To define the charts to be available to users when managing talent pools.	<b>Configuration &gt; [Taleo Performance] Administration &gt; [Talent Pools] Talent Pool Template</b>

## Performance Matrix Mode

The performance matrix enables an organization to better visualize and analyze employees, whether by presenting employees on a cell matrix using two data points (X and Y axis values), or as potential successors in a succession plan or in a talent pool.

The most common values used for analysis are the Performance and Potential dimensions, which are the axes set by default. When a matrix is configured and subsequently used, the employees who have been added to the matrix and have data for each of the dimensions (axis values) will fall into a matrix cell.

The user has the ability to move employees around from one cell to another. This override functionality is very powerful as the dimension values may not tell the true story. Both the original and overridden cell placement are stored in the database.

When you edit a performance matrix, action buttons are provided for updating the metrics for all employees in a matrix or you can select to update individuals.

When an employee has been moved in a matrix, an icon indicates their metrics have been overridden. Now you can choose to update employee metrics and commit the change to their person record. When an update has been committed, you cannot automatically return the employee to their original cell.

A color palette is available to customize a cell's background color in the configuration module. Also cell distribution details can be displayed, showing the percentage breakdown of the total number of matrix members in each cell.

A performance matrix can contain a maximum of 5 columns (X axis) and 5 rows (Y axis), for a total of 25 cells.

Each matrix can present 2 dimensions, one for each axis, and each axis can correspond to any of the 11 available dimensions:

### Employee Metrics:

- Employee - Review Rating
- Employee - Potential - this metric is customizable. You select the value you want for each division during configuration and do not set thresholds.
- Employee - Risk of Loss - this metric is customizable. You select the value you want for each division during configuration and do not set thresholds.
- Employee - Promotability Readiness - this metric is customizable. You select the value you want for each division during configuration and do not set thresholds.
- Employee - Years in Management
- Employee - Years in Industry
- Employee - Competency Rating
- Employee - Goal Rating

### Review Metrics:

- Review - Current Review Rating
- Review - Current Review Goal Rating
- Review - Current Review Competency Rating

## Review Auto Saving

An autosave feature is offered for reviews so that review information is automatically saved at regular time intervals to prevent loss of information in case of application time out or when the user navigates between review items.

When the autosave feature is enabled, the system performs an automatic save of the review information after the defined period of inactivity or at a fixed interval, depending of the selected autosave type. In addition, a time stamp label has been added at the top of the review window to inform the user of the time of the last automatic save.

When enabled by the system administrator, this feature is enabled for all users.

Even when the autosave feature is enabled, users always have the ability to manually save reviews by clicking the Disk icon.

### Configuration

The autosave feature is optional and disabled by default.

To activate the autosave feature, it must be configured via **Configuration > [Taleo Performance] Administration > [Global Configurations] Settings**

Setting Name	Description	Possible Values	Category
Autosave	Indicates if autosave is being used and whether it occurs between periods of inactivity (Idle) or at the same set interval, regardless of system activity (Automatic).	<ul style="list-style-type: none"> <li>• Disabled (default value) - Autosaving is disabled for the application.</li> <li>• Idle - Autosaving will only be done after a certain period of idle activity has elapsed.</li> <li>• Automatic - Autosaving is always on, even if the user is interacting with the application.</li> </ul>	Global Settings
Autosave Interval	<p>Indicates the amount of time between automatic saves. The autosave interval differs based on the type of autosave.</p> <p>If Autosave value is 'Idle', the interval will be the time before an autosave is performed when there is no user activity detected. If the Autosave value is 'Automatic', the</p>	<ul style="list-style-type: none"> <li>• 2 minutes</li> <li>• 5 minutes (default value)</li> <li>• 10 minutes</li> <li>• 20 minutes</li> </ul>	Global Settings

Setting Name	Description	Possible Values	Category
	interval will correspond to the time between each autosave.		

## Offline Reviews

Authorized users are able to download their reviews to work on them locally and upload them directly back into Performance Management.

For some customers without reliable internet connectivity, or that may share a computer, or for the manager that would like to work on reviews from the plane, completing Performance Reviews online is not always possible or convenient. Managers, HR Administrators, collaborators and employees with the appropriate review edit permissions are able to:

- Locally download their own or their employees' Performance Reviews.
- Modify the downloaded Performance Review providing ratings and comments. Comments and Ratings are the only editable values in the offline review.
- Save modifications locally at any time and complete the review in phases.
- Upload the completed reviews back up into Performance Management.

Important considerations when using Offline Reviews:

- Offline Reviews must be enabled in the Configuration.
- The review must be in **Draft** status to use offline.
- Adobe 11 or higher must be installed; the offline review is a PDF. Microsoft Word or Excel are not supported.
- Users cannot choose which sections to download. The configuration options that are enabled for the online review are duplicated in the offline review; there is one set of configuration settings.
- History is not supported.
- Summary grids are not supported.
- Batch processing of offline reviews is not supported; one review at a time may be downloaded or uploaded.
- No calculations are performed in the offline review.

### Accessing Upload and Download Features

The Download Review and Upload Review options are only displayed if the logged in user has permission to manage reviews. These authorized users can use the Actions menu to download and upload Performance Reviews. Additionally, managers can use the Contextual menu in the Review Hub to download and upload reviews.

### Rating Calculations

The configuration options chosen for the online review are duplicated in the offline review. This is especially important in understanding how rating calculations function when downloading and uploading reviews. If a user is able to manually override calculated scores in the online review, they will be able to do so in the offline review. However, no calculations are performed in the offline review! Ratings are recalculated at the time of upload only. *Overall Rating*

*Auto-Calculated* and *Allow to Override Overall Rating* are the two rating configurations that are key in how the ratings calculations behave between the online and offline reviews.

Settings	Navigation
Overall Rating Settings and Settings by Rater	<b>Configuration &gt; [Performance] &gt; Administration &gt; [Performance Reviews] &gt; Review Definitions</b>

### *Download and Upload with a Summary Rating Already Calculated*

If a user downloads an online review with a summary rating that already has a calculated value, it will display in the offline review as follows:

**Michael Decker's Information**  
Weight: 1/1 (100%)  
Overall Rating

Not Applicable

**Calculated Rating**  
7.3 7 - Exceeds objectives

If a user changes any of the item or section ratings in the offline review, the summary ratings in the offline review will not be calculated. However, upon upload, the summary ratings will be recalculated and updated to account for any changes to the item or section ratings that were made in the offline review. The overridden values will be flagged, as indicated by the exclamation point icon.

### *Download and Upload with a Summary Rating Manually Set*

If a user downloads an online review with a summary rating that already has a manually (overridden) set value, it will display in the offline review as follows:

**Michael Decker's Information**  
Weight: 1/1 (100%)  
Overall Rating

Overridden !

Not Applicable

If the user does not change the value in the offline review, when uploaded, this manually set (overridden) value will be maintained and flagged as an overridden value in the online review.

### *Upload with No Value Set for the Summary Rating*

If the user erases a summary rating value and leaves it blank in the offline review, when uploaded, the system will automatically calculate the value and enter the newly calculated rating in the online review.

## Messaging

Process/Action	Message	Details
Attempting to upload a file type other than a PDF	Error. "The file cannot be opened. It can be corrupt or in an improper format."	Only the PDF file format is supported. If the file format is not recognized (anything other than PDF) the file cannot and will not be uploaded.
Attempting to upload a review PDF, but for the incorrect employee	Error. "The file you uploaded does not match with employee and review request selected. Please verify the employee and the review request."	Validations are performed on employee ID and review ID to verify that the correct review for the correct employee is being uploaded. PDFs are unique per employee review. You cannot change employee name or employee information on the PDF.
Date check	Warning.  "A more recent update to this review occurred on [[last review date + hour]]. The review document you are importing was last modified on [[last form update + hour]] and will overwrite the current version. Do you wish to continue?"	The dates of when both the online review and the offline review were last modified are compared with each other. If it's the case that a modification to the online review that's dated after the date of the last modification to the offline review, users are warned that uploading the offline review will overwrite the current version of the online review.
Fields not found	Warning.  "We have detected fields on the review document that were removed and cannot be updated online. Do you wish to continue updating all other fields?"	It may be the case that a goal, for example, was removed on the online review while work was being done on the offline review. Because items cannot be removed from the offline review, when the review is uploaded, the system will reconcile this change by warning the user that some fields have changed on the online review.
Confirmation before saving upload	Warning.  "You are about to update the review request [[review request name]] for [[employee name]] with the selected offline review. Do you wish to continue?"	This is a reminder to the user prior to uploading the offline review, that the rating values and comments that exist on the online review will be overwritten with the values on the offline review upon uploading.
Network or unexpected error	Error. "A problem occurred with the file handling. Please try again."	
File validation	File Validation. "File validation in progress..."	This displays once a user selects <i>Upload</i> .
Review upload	Review upload. "Review upload in progress..."	This displays once a file is validated and while the review is being uploaded.
Upload completed	Upload completed. "Your review has been successfully uploaded."	Once the review upload process completes successfully, this message is displayed.

## Configuration

- Adobe 11 or higher must be used for the Offline Reviews feature to render properly and as expected.



**Note:** Browser settings and Adobe versioning determine where and how the PDF reviews are saved and rendered.

- There is a company setting in the Administration pages to enable offline reviews. This is a private setting; only Support users are able to view and edit this.

Type Permission	
Name	Location
Enable Offline Review	Configuration > [Performance] > Settings > [Product Settings] > Enable Offline Review

## Downloading an Offline Review

Downloading a Performance Review allows authorized users to access and edit reviews offline in a PDF format.

The Performance Review must be in *Draft* status to download the review offline. The user must have proper permissions to be able to download the review; if not, the download and upload menu options will not display.

**Performance > [Navigation bar] > Reviews**

**Performance [Navigation bar] More dropdown Team Reviews**

1. Select Performance Review to be downloaded.
2. From the Actions menu, select Download Review.
3. Save the PDF to a location of your choice.

The Performance Review is now available offline in a PDF format and ready for editing.

## Uploading an Offline Review

Uploading a Performance Review allows authorized users to upload reviews that have been edited offline. At the time of upload, changes made offline are updated and recalculations performed when applicable.

The user must have proper permissions to be able to upload the review; if not, the download and upload menu options will not display.

**Performance > [Navigation bar] > Reviews**

**Performance > [Navigation bar] > More dropdown > Team Reviews**

1. Select Performance Review to be uploaded.
2. From the Actions menu, select Upload Review.
3. Browse to the PDF to be uploaded back into Performance Management and click Upload.

The system performs several validations on the file to be uploaded. For example, if the review of a different employee other than the one selected in the application is selected to upload, users will receive an error message and the upload will cease. It is important to pay attention to the validation warnings and errors as data can be lost.

4. Read the confirmation message and click Confirm when satisfied this is the correct review and action.

The latest version of the Performance Review, including offline edits, is in the Performance Management application.

## Working with Performance Reviews

### Performance Review Management View

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.

The management view of performance reviews is similar to the view offered to administrators in the HR Administrator Tools, but with different filters. This view is only available when reviews are accessed via the Team Review link for users who have the appropriate user type permission.

This management view is the solution for managers who need to have access to aggregated review information on employees they are responsible for. Instead of working on each individual employee review, the management view allows the user to have an overall appreciation of the review process and perform review related actions or tasks (individually or in batch).

The performance review management view is the starting point to perform calibration of reviews.

The performance review management view also offers a filter panel with various fields and metrics available to user. This allows the user to narrow down the displayed reviews according to a desired criteria. The user can then reduce the scope of employee reviews he has access to and view the resulting reviews in any of the views offered - list, matrix or chart. The list view is displayed by default. As for the matrix and chart views, their availability depends on whether the performance review template has been configured to include these views or not.

The actions that can be performed depend on the user's user type permissions and the permissions granted upon review configuration.

### Configuration

This feature is optional. The related user type permission must be granted.

The access to this management view of performance reviews is only available via the Navigation bar, More dropdown, Team Reviews link.

User type permissions required to entitle users to access the management view of performance reviews:

Permissions Configuration > [SmartOrg] Administration > [Users] User Accounts	
Permission Name	Setting Description
Performance > Performance Reviews > Access via Manager Center	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.

Permissions Configuration > [SmartOrg] Administration > [Users] User Accounts	
Permission Name	Setting Description
Performance > Performance Reviews > View	This permission is required for the user to have the right to view reviews.
Performance > Performance Reviews > Manage	This permission is required for the user to have the right to manage reviews.

In the Performance Reviews section of Performance Administration, there is a new link called 'Performance Review Template'. This template determines the chart and matrix views to be available in the performance review management view. There is only one default performance review template configuration that is applied for all users. This template is always active and cannot be deleted.

## Filtering Reviews

Performance review filters are divided into Basic filters and Advanced filters that enable managers and HR Administrators in the Performance Hub to focus on a specific set of employees, who they can subsequently perform batch actions on or calibrate their reviews.

**Basic Filters** - Are unique to reviews and include Review Cycle, Review Request, Include Direct Reports, People, and Review Steps.

**Advanced filters** - Are found in different modules and the filters that are available will vary depending on which modules are enabled in your implementation.

### Default Logic for the Review Cycle and Review Request Filters.

When a manager or higher-level manager opens the Performance Review page from the Navigation bar, More dropdown, Team Reviews option, the following processing logic occurs:

1. The My Direct Reports option is selected by default.
2. This generates a list of review items for employees who are the direct reports to the login user.
3. Based on the list of employees, the system figures out what is the latest review cycle and populates the value in the Review Cycle filter.
4. Based on the latest review cycle, the system figures out what is the latest review request and populates the Review Request filter.

Manager A has three direct reports: Employee 1, Employee 2 and Employee 3, where:

- Employee 1's latest review cycle is 2011 and review request is Marketing Review.
- Employee 2's latest review cycle is 2012 and review request is R+D Review, May/2012
- Employee 3's latest review cycle is 2012 and review request is Sales Review, Sep/2012

When Manager A logs in and opens the Performance Review module they will see "2012" showing under "Review Cycle"; "Sales Review" under "Review Request"; and the list of employees will show Employee 3.

Performance Review Filters:

**A - Review Cycle** and **Review Request** are preloaded by default. Unlike some of the others, these filters must always have values selected, which is why one of the values is *Not Set*. The options available in the **Review Steps** filter are

dependent on these values. When the **Review Cycle** filter is set to *Not Set* the **Review Request** filter options are disabled. Once the **Review Request** is set to anything other than *Not Set*, the **Review Steps** are disabled.

**B - Exclude my direct reports** is set to **No** by default. Setting it to **Yes** is useful when working with your direct reports to calibrate their employees if you do not want them to see their ratings.

**C - People** provides the ability to see all employees in your organization, your direct reports, or specific employees and their direct reports. By default **My direct reports** is selected and they are displayed in the list. Up to eight direct reports are displayed by default in the filters. You can display up to sixteen direct reports by selecting **Show More** and collapse it back to the default view by selecting **Show Less**. When you select a direct report, they and all employees under them are displayed in the list. Selecting **Other** will display that employee and everyone within that persons part of the organization. You must always select one of these filter options, regardless of any other selected filters, including the advanced filters. If you clear the **People** filters and click refresh, the **My organization** filter option is automatically applied.

**D - Review Steps** filters enable you to display only those employees who are currently at a specific step in the performance review workflow. The available steps are related to the chosen Review Request. Selecting a step will display users with Employee Review Statuses of the previously completed step. For instance, selecting Revision Step displays employees with a status of Calibrated and selecting Writing Step displays employees with at Draft status.

**E - Show advanced filters** displays the configurable filters, which are used in different modules throughout the system. The **Employees** section in advanced filters no longer has the currently logged in user populating the **Manager** filter, by default.



**Note:** If there are more than 1000 reviews, the first 1000 are displayed and you will subsequently need to refine your filters to see the remaining reviews.

## Configuration

Basic filters cannot be configured, while Advanced filters — which are used throughout the system — are configured via **Configuration > [Performance] Administration > [Global Configurations] Filters**.

## To Filter Performance Reviews

### Performance > [Navigation bar] Reviews

1. In the Filters panel of the Performance Reviews page, select the filters that will allow you to show the desired reviews.
  - o Click the Refresh icon to launch the search and refresh the results.
  - o Make sure to clear the existing filter values by clicking the Eraser icon; otherwise the previous filters will be selected by default.
2. If the number of reviews listed is too large, you can reduce the number of results by further refining the filters and repeating the previous step.

In such a case, do not click the Eraser icon so that the second set of filters is applied to the previous result.

The reviews listed should correspond to the filtering options you have specified.

From the list of review, you can perform various batch actions, calibrate review ratings or employee metrics or just view the reviews in a different mode.

## Mid-Year Review Reference

To ease the review process, users are able to quickly access ratings and comments captured in mid-year reviews directly within the focal annual review.

The mid-year review reference allows users to view information from their mid-year review within the context of completing their annual review without having to navigate away from the annual review page. The mid-year review tab displays mid-year review information side-by-side with the annual review for each corresponding review item for which there is a match.

While an employee is completing their own self-assessment, they can view information from both their manager's mid-year review of their performance as well as their own mid-year review.

While a manager is completing a review for one of their employees, they are able to view information from that employee's self-assessment, if available, as well as from the employee's mid-year review.

The mid-year review reference is supported in downloaded offline reviews and is reportable from Native Reporting as part of the annual reviews. The mid-year reference information is available for:

- Overall section
- Review sections
- Section items
- Review sub-items

The following scenarios detail messaging and system behavior when handling the mid-year review reference:

- When the ratings and/or comments are not available for certain items or sections, messaging will indicate this is the case, but the mid-year review tab will still display.
- When the user does not have access to the mid-year reviews, they will receive a message indicating, "*No access to mid-year review.*"
- When the mid-year review is canceled after the mid-year review reference is generated, the message, "*Mid-year review is not available*" will display. The same message will display when any of the review items are no longer valid such as if an item is removed from either the annual review or the mid-year review.
- The mid-year review form does not need to be closed out in order for ratings and comments to dynamically update the annual review form.
- If a mid-year review item is deleted, it is referenced from the annual review, therefore, messaging will indicate, "*Mid-year review item is not available.*"

### Printing

The mid-year review option will only display in the **Print Options** when the mid-year review reference is enabled. The mid-year review information will display beneath the annual review on the print-out.

### Configuration

To simplify the configuration process, the mapping of the annual reviews to the mid-year reviews is done automatically. Only one mid-year review per employee will be mapped. When multiple mid-year reviews exist for a single employee,

the mid-year reference generation will be based on the most recent mid-year review within the same focal review period.

For the mid-year review reference feature to function properly, the following criteria must be met:

- Mid-year review start and end dates must be within the same annual review period.
- The same review section codes need to be used in both the mid-year and the annual review definitions.

The mid-year reference is created during the annual review generation. The mid-year review reference only displays in annual reviews if the *Include Mid-Year review* option is selected in the configuration. The *Include Mid-Year review* checkbox is only available for the annual reviews.

User Type Permission	
Name	Location
Include Mid-Year review	Performance > Configuration > [Performance] > Administration > Review Cycles> (select Review Cycle) > [Review Requests] > (select Review Request) > [Settings]

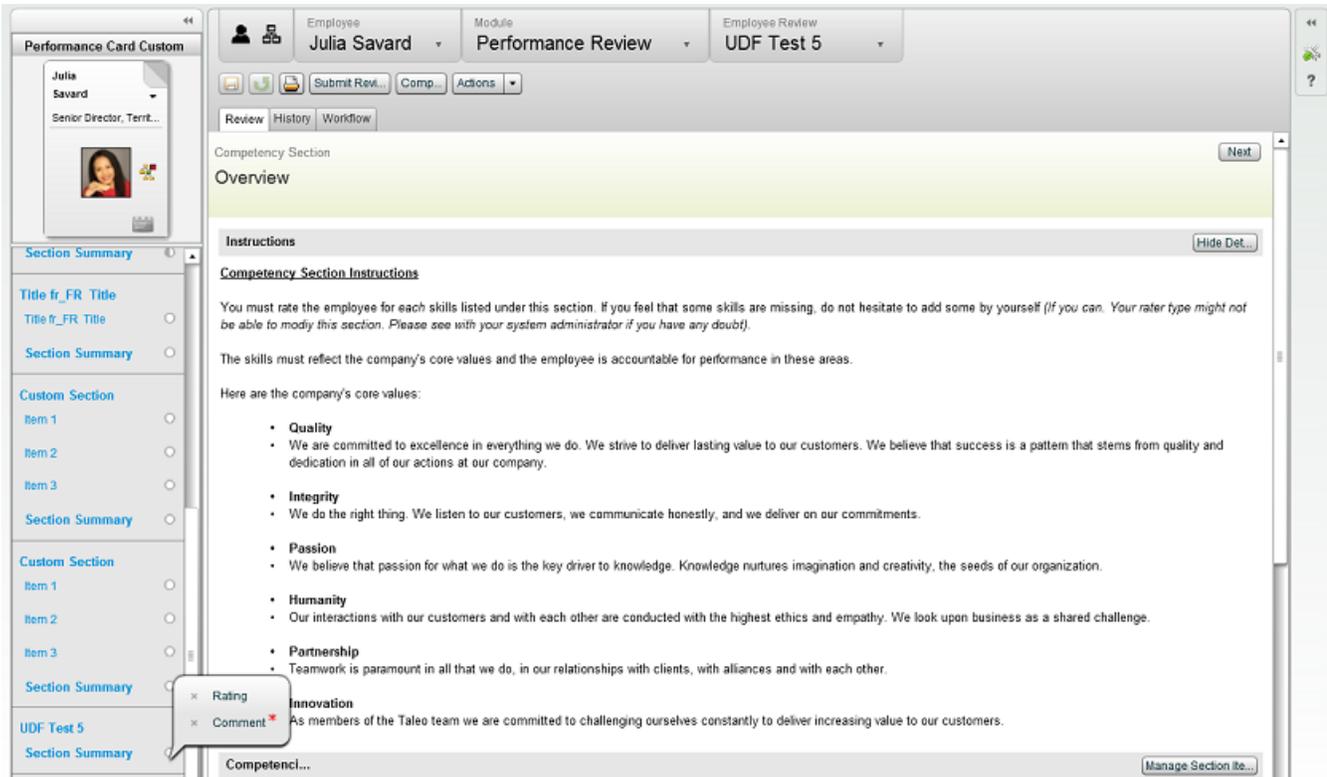
## Review Completion Indicator (Bubble)

The review completion bubbles and their corresponding hover text, Rating and Comment, in the Performance Review Overview area reflect how the review item has been configured. This provides a visual cue as to whether items in the Performance Review are mandatory and whether they are complete.

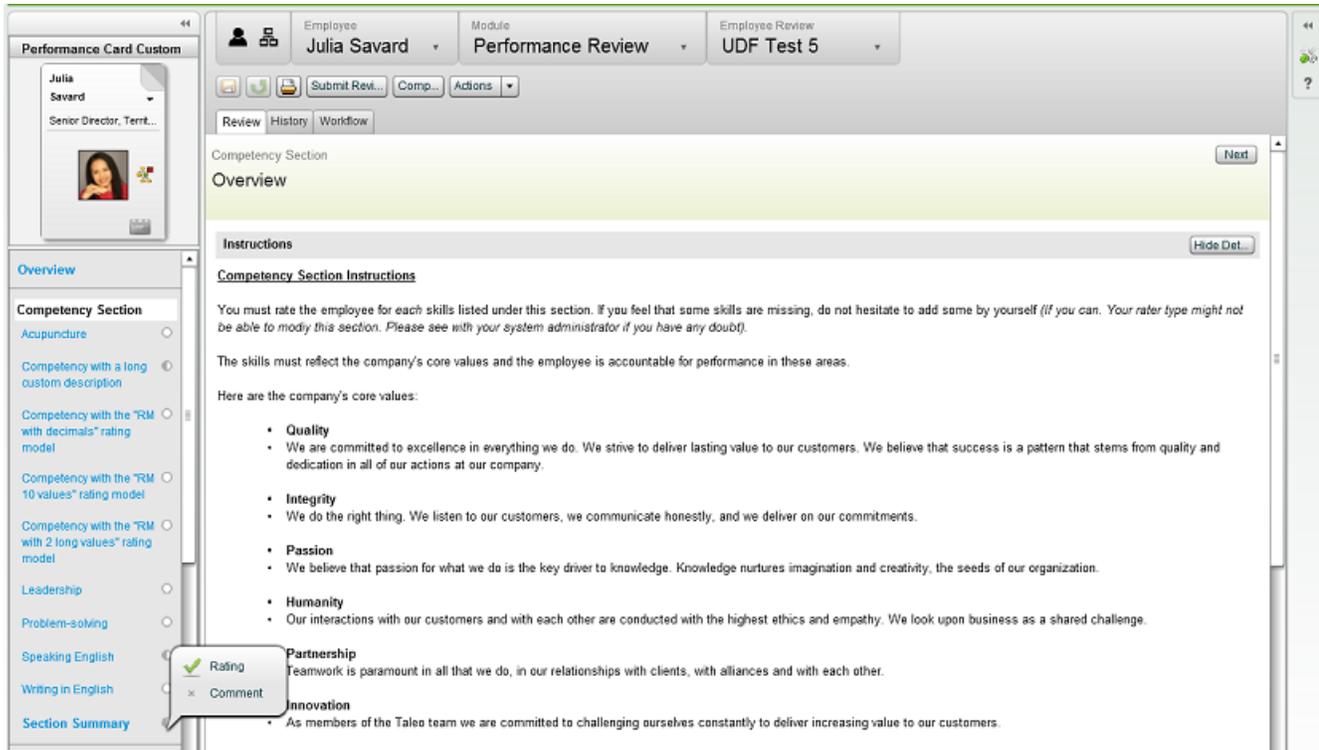
The indicator behavior logic is based upon whether comments or ratings are available in the review item. For example, if only ratings are available in the review item, the review completion indicator will show that item is complete once the rating has been entered. The bubble always reflects whether there are still items, ratings or comments, left to complete. The hover text reflects what has been completed, and what is required.

Mandatory information is flagged with an asterisk, while optional information is not.

The following image shows an example of the Review Completion Bubble completely unfilled, meaning that both rating and comments are enabled and neither are completed. Additionally, the hover text shows that comments are mandatory.



This next image shows an example of the Review Completion Bubble half filled, meaning that both Rating and Comments are enabled and one of the two is complete. Additionally, the hover text shows that Rating is complete, indicated by the green check mark. Neither Rating or Comments are mandatory as there is not an asterisk next to either.



The following image shows the various Review Completion Bubble and hover text combinations.



**Note:** If either ratings or comments, or neither, are enabled for the review, the hover text displays accordingly. In the example shown below, ratings is disabled, but comments is enabled, so hover text only displays comments. Notice also in the example shown that comments are optional, as indicated by the lack of an



asterisk icon.

## Configuration

Review Rating and Comments must be enabled in the Review Definition for the Review Completion Bubble and hover text to display.

## Completing a Self-Assessment

Completing a self-assessment allows you to evaluate your own performance. Aspects of the self-assessment, such as when it is assigned to you are configured in the review's workflow.

You can complete a self-assessment if one has been assigned to you and is displayed in My Tasks.

1. In My Tasks, from the Show list select Self-Assessment.
2. From the Tasks list, select the relevant item.
3. From the Summary window, select Performance Review.
4. The Overview section of the review is displayed.
5. Click **Access the review** to go to the section summary and begin filling out your self-assessment.
6. Read through the entire review and in the Sections segment of the form select the items that require self assessment.
7. In your information section for an item, under the Weight field use the rating bar to select the appropriate value.
8. If comments about your rating are required or desired, double-click the Comments field and enter your text.  
If you are uncertain about the text to enter, you can use the Writing Assistant from the Toolbox to obtain a list of existing texts. These texts can often guide you in providing appropriate comments. The Writing Assistant is only available if the related setting has been activated for employees.
9. Make sure to click Disk icon to save your ratings.
10. Depending on the review's workflow configuration, your manager may be able to add additional items to your review, which are indicated with a plus icon. You must select the item and click Add to ensure it is included in your performance review.
11. If you are required to release the review to the manager, click Complete Write Self-Assessment and enter any additional comments and click OK.

Note that whenever a review is closed, by you or automatically, you can no longer edit it.

If you completed the task successfully, a message to that effect is displayed. When the self-assessment is complete, your tasks in the Workflow tab display a green circle.

## Sending a Review Back to an Employee

A manager might need to send a review back to an employee when, for example, the employee's self-assessment is incomplete or the employee wants to change some ratings. This task can only be performed on one review at a time.

Managers must be allowed to restart the review workflow for this review request. The review must have been completed and submitted by the employee, but not yet submitted by the manager.

**Performance > [My Tasks]**

**Performance > [Navigation bar] Reviews** (select Others...)

Matrix managers are also entitled to send a review back to an employee, the same way the original manager can.

1. Find and open the desired performance review.
2. In the **Performance Review**, from the **Actions** pull-down list, select **Send Review Back to Employee**.

The review will be sent back to the employee and will be reset to a Draft status.

## Approving an Employee's Performance Review

If a performance review workflow includes an approval process, the approvers specified in the review request can verify and approve or reject the manager's performance review of the employee and the employee's self-assessment (provided the latter is also part of the workflow).

Someone specified you as an approver in a review request.

1. Select the review you want to approve in Performance or via email:
  - o Filter **My Tasks**, by selecting **Employee Performance Review**, choose one of the submit for approval tasks, and then select **Performance Review** from the Summary Information panel.
  - o Open the approval email and click the link for the performance review. If you are in a single sign-on (SSO) environment you will go directly to the review, otherwise you will need to login to Performance before being directed to the review.
2. In the Performance Review, the Overview section of the review is displayed.
3. Read through the entire review and verify the provided ratings and comments.

Note that no editing is possible in the approval task.
4. Click the **Decide on Approval** to display the Approval dialog box.
5. Enter comments and click **Approve** to progress the review to the next workflow stage or click **Reject** to return it to the previous stage.

If you completed the task successfully, a message to that effect is displayed. Also, the approver's task in the workflow status bar displays a green circle.

## Calibrating Reviews

Calibrating reviews involves launching the calibration phase, performing calibration on employees, revising comments on calibrated reviews, and ending the calibration phase.

Calibration occurs after the draft step of a performance review, when managers and employees have completed their assessments, but before the review progresses to the approval or release step.

### Launching Calibration

The calibration owner of the review request for the reviews to be calibrated, is responsible for launching the calibration process.

Once an acceptable number of reviews have successfully passed through the writing step of the review workflow, the calibration owner can launch calibration and move reviews to the calibration step. Typically the calibration owner will meet with key stakeholders and calibrators to confirm the company's review process has progressed far enough to begin calibration.

Launch Calibration is only available in the Performance Hub when the logged in user is the calibration owner of the selected Review Request, and there are employees associated with that request who have not been progressed to the calibration step.

When calibration is launched, all reviews in the draft step will be moved to the calibration step, whether the manager has submitted them or not.

### Calibration Rating Lock

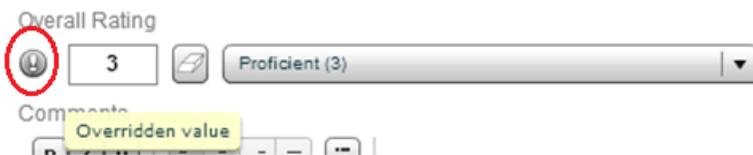
During calibration, the entire review is locked and calibration rating changes are tracked in the Review History.

A review under calibration is only editable by a Calibrator. Review authors are not able to make any changes to the review during calibration. After a review is submitted, it is locked to all review authors. During the *Calibration* phase of the review process, only Calibrators are able to modify the calibrated section ratings. During the *Revise* phase of the review process, all the calibrated section ratings remain locked, but non-calibrated section ratings, item ratings and comments are open to review authors.

### Calibration Flags

Calibration flags denote whether a rating is calibrated with or without change. These flags apply to any Calibration section and to the Review Overall Rating. Any of the following three flags can be seen in the Review Summary section and in the Overall Rating section, depending on the review workflow step:

- Overridden value



- Calibrated with Change



- Calibrated without Change



### Calibration Events History Tracking

The Review History tracks all of the events related to the overall and section ratings. Any event that involves a change to a section rating used for Calibration or to the Overall Rating is recorded in the Review History. The following events are tracked in the Review History:

- Review Section Rating Assigned
- Review Overall Rating Assigned
- Review Section Rating Changed
- Review Overall Rating Changed

Date and Time	Event	Details	By
May 24, 2013, 9:32:18 AM	Review Created	The review has been created.	System User
May 24, 2013, 9:32:54 AM	Review Assigned	The review has been assigned.	System User
May 24, 2013, 9:45:25 AM	Review Section Rating Assigned	The review section rating for Competency section is set to 3.	Jonathan Coleman
May 24, 2013, 9:45:25 AM	Review Section Rating Assigned	The review section rating for Goal section is set to 4.	Jonathan Coleman
May 24, 2013, 9:46:59 AM	Review Overall Rating Assigned	The review rating for overall is set to 3.67.	Michelle Campbell
May 24, 2013, 9:46:59 AM	Review Section Rating Assigned	The review section rating for Custom section is set to 4.	Michelle Campbell
May 24, 2013, 9:47:29 AM	Review Submitted	The review has been submitted.	Michelle Campbell
May 24, 2013, 9:47:29 AM	Review Under Calibration	The review is under calibration.	System User
May 24, 2013, 9:49:39 AM	Review Section Rating Changed	The review section rating for Custom section has been changed from 4 to 5.	Katy Dumais
May 24, 2013, 9:51:21 AM	Review Overall Rating Changed	The review rating for overall has been changed from 3.67 to 1.	HR Admin (All) PM
May 24, 2013, 9:55:53 AM	Review Calibrated	The review has been calibrated.	Katy Dumais
May 24, 2013, 9:56:16 AM	Review Revised	The review has been revised.	Katy Dumais
May 24, 2013, 9:56:33 AM	Review Under Approval	The review is under approval.	Katy Dumais
May 24, 2013, 9:56:53 AM	Review Section Rating Changed	The review section rating for Custom section has been changed from 5 to 2.	Katy Dumais
May 24, 2013, 9:56:53 AM	Review Section Rating Changed	The review section rating for Competency section has been changed from 3 to 5.	Katy Dumais

 **Note:** The calibration flags are not supported in print.

### Matrix Review Metrics in Active Reviews

Managers and HR Administrators are able to use the Performance Matrix, or 9-Box, in addition to charts to calibrate and make changes to the Current Review Rating, Current Review Goal Rating and Current Competency Rating scores on the Performance Reviews during the calibration or other phases of the review workflow.

The Performance 9-Box dynamically updates current Review Metrics within active Performance Reviews in addition to the Employee Metrics that are updated in the Talent Profile. These additional 3 Review Metrics allow users to evaluate and visualize their employee's work performance based on a total of 11 different dimensions pulled from both the Performance Review and the Talent Profile.

#### Review Metrics:

- Review - Current Review Rating
- Review - Current Review Goal Rating
- Review - Current Review Competency Rating

#### Employee Metrics:

- Employee - Potential
- Employee - Risk of Loss

- Employee - Promotability Readiness
- Employee - Years in Management
- Employee - Years in Industry
- Employee - Review Rating
- Employee - Goal Rating
- Employee - Competency Rating

### Updating Review Metrics vs. Updating Employee Metrics

As users work their way through the calibration process, it is critical to understand system behavior and messaging. Employee Metric changes made on the 9-Box will not update the Talent Profile until the *Update Metrics* button is clicked. Until that action is manually taken, the changes made remain confined to the 9-Box. However, Review Metric changes are automatically applied to the Performance Reviews without taking any further action. As the changes to Review Metrics are made on the 9-Box, the system is automatically, dynamically updating the Performance Reviews to reflect those changes. Each time either an Employee Metric or Review Metric is changed on the 9-Box, this is indicated by the employee name appearing in a different color. Only Employee Metric changes are indicated by the overridden icon. The overridden icon does not display for Review Metric changes only because the updating is dynamic; an override doesn't actually happen. If no changes have been made, either to the Employee Metrics or the Review Metrics, the *Update Metrics* button is disabled and the message, *No metrics have been changed* displays.



**Note:** The color highlight that appears when changes are made to employees disappears if users navigate away from the page.

**Team Reviews** ← Label change from Performance Reviews to Team Reviews

Update Metrics No metrics have been changed.

Matrices: 9 Box CRR and Potential

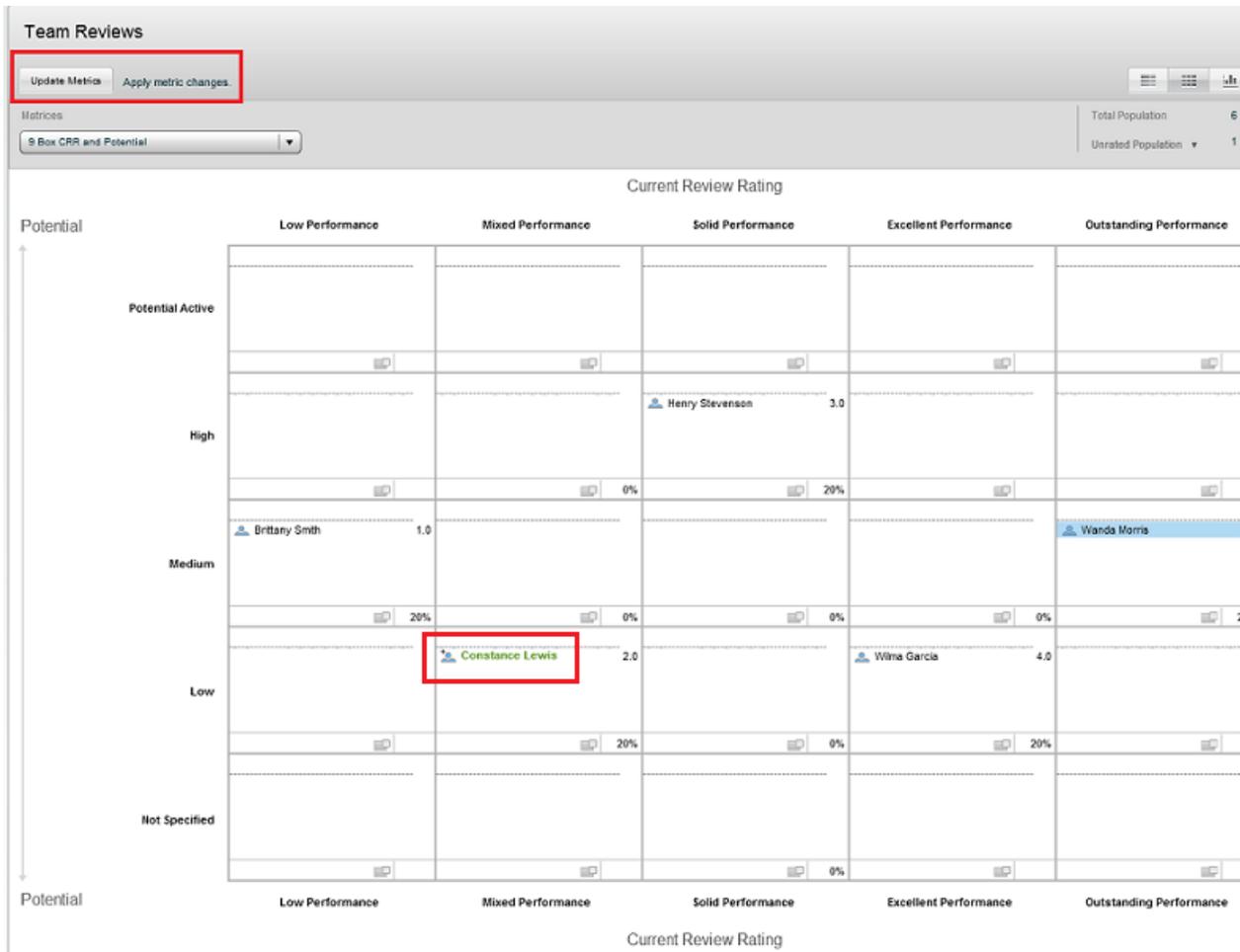
Total Population: 6  
Unrated Population: 1

		Current Review Rating				
		Low Performance	Mixed Performance	Solid Performance	Excellent Performance	
Potential	Potential Active					
	High			Henry Stevenson 3.0		
Medium		Brittany Smith 1.0	Constance Lewis 2.0			
	Low				Wima Garcia 4.0	
Not Specified						
		20%	20%	0%	0%	0%
				0%	0%	20%

Current Review Rating

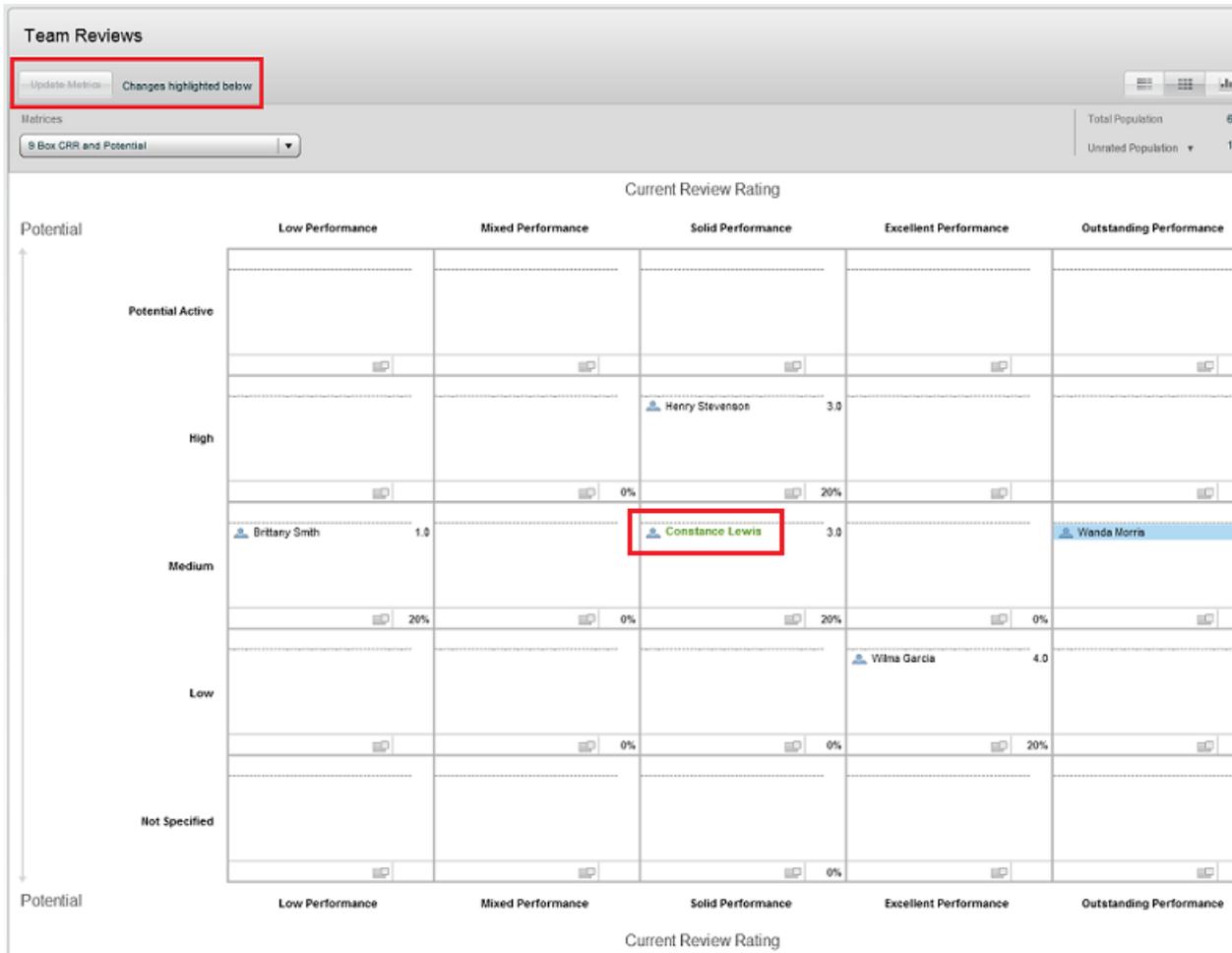
### 9-Box with No Changes

If only Employee Metrics are modified, the *Update Metrics* button is enabled and *Apply metric changes* displays. Also note that the employee that's been modified is highlighted in a different color and the overridden icon displays.



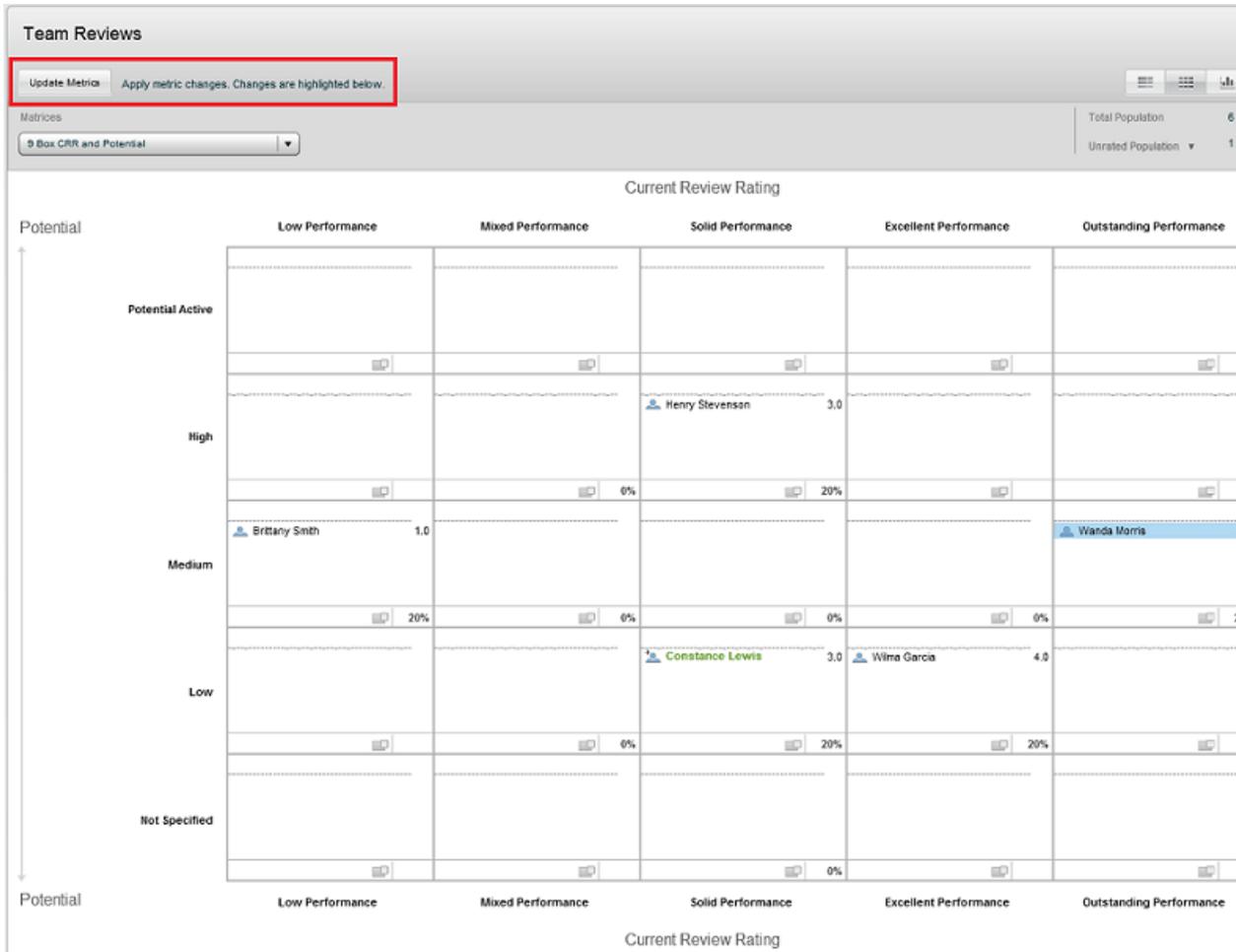
9-Box with Employee Metric Changes Only

If only Review Metrics are modified, the *Update Metrics* button is disabled and as the changes have already been applied to the Performance Review, *Changes highlighted below* displays. Also note that the employee that's been modified is highlighted in a different color but the overridden icon does not display.



*9-Box with Review Metric Change Only*

When both the Employee Metrics and the Review Metrics have been modified, the *Update Metrics* button is enabled. Users must click this to update the Talent Profile. *Apply Metric Changes* displays as a reminder. *Changes are highlighted below* also displays to denote that the Performance Reviews have been updated.



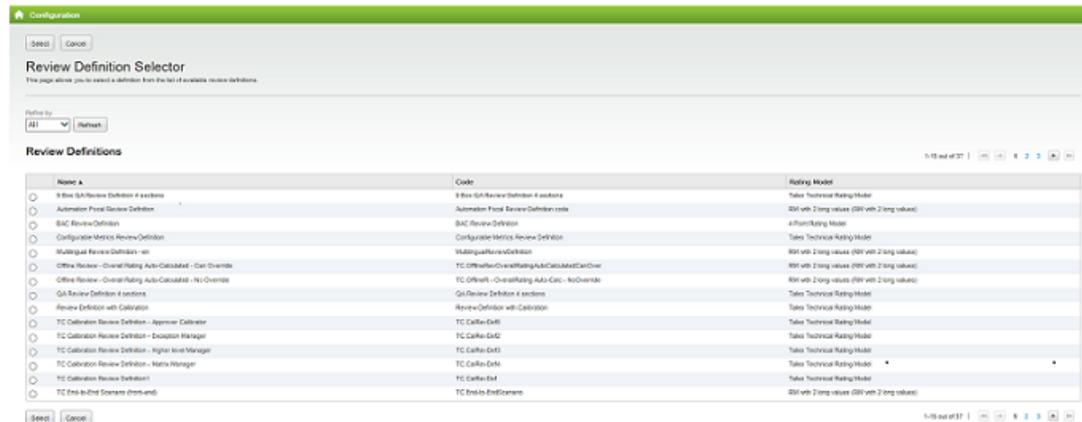
### 9-Box with Both Employee Metric and Review Metric Changes

#### Configuration

Type Permission	
Name	Location
<ul style="list-style-type: none"> <li>Review - Current Review Rating</li> <li>Review - Current Review Goal Rating</li> <li>Review - Current Review Competency Rating</li> </ul>	<b>Configuration &gt; Administration &gt; [View Modes] &gt; Matrices</b>

As has always been the case, users must first define and activate their Calibration matrices, then add those matrices to the Performance Review Template. Once one of the new 3 Review Metrics is selected in the Axis Editor, the users are prompted with the following message, "Review Definitions Selector: You can select a review definition from which the rating model dimensions can be taken. Do you want to open the "Review Definition" selector now?" It is highly recommended that users select Yes so that the Matrix' dimensions are mapped to the correct Review Rating scale. Because normalized scores are used, mapping the Matrix dimensions to the Review Rating scale will ensure optimum results when using the Matrix for calibration. If different Review Rating scales are to be used for Review Ratings, it is

recommended that 1 matrix is created per Review Definition. For example, if a Review Definition for an executive is a 3-point scale and a Review Definition for an employee is a 5-point scale, using 2 matrices is recommended to deliver the most accurate results.



## To Launch Calibration

You must be the calibration owner for the review request and it must have the Calibration step in its workflow.

### Performance > [Navigation bar] More dropdown > Team Reviews

1. Select the **Review Cycle** and **Review Request** you want to calibrate and click the Refresh icon.

It is possible that no employees are displayed. This does not prevent launching calibration.

2. Click **Launch Calibration**.

A message is displayed indicating how many employees will be moved from the writing step to the calibration step.

3. Click **OK**.

A message is displayed indicating you can see the progress of the action from *Show Process History*.

All of the employees associated with the review request are moved to the *Calibration* step.

High level managers of those employees can now begin calibrating their reviews.

## Performing Calibration

Once calibration has been launched, calibration owners and high level managers can use charts in the Performance Hub to calibrate employees.

Only charts which use *Employee - Review Rating*, *Employee - Goal Rating*, or *Employee - Competency Rating* can be used for calibration. Which of the three your company uses will depend on your implementation.

When you show bar details you can see the employees and the metrics that have been included with the chart, to better judge where they should be placed in the chart.

Calibration can be done for individual employees by selecting a Current Review Rating and Current Section Rating value in the list. To calibrate up to twenty employees at once, you can select them from the list and drag and drop them into a bar column.

## To Perform Calibration

HR Administrator must have launched calibration.

Must be a higher-level manager to calibrate reviews.

### Performance > [Navigation bar] More dropdown > Team Reviews

1. Select the **Review Cycle** and **Review Request** you want to calibrate and other criteria to focus on the employees you want to calibrate and click the Refresh icon.
2. Select the required charts from the **Charts** list.

There can one or more charts required for calibration, depending on the number of sections in the review requiring calibration. There needs to be a separate chart for each rating being calibrated.

3. Select the employees from the list and drag and drop up to twenty of them in the appropriate chart bar.  
or

From the current rating column, select the rating from the list for individual employees.

Both the bar chart and the current rating column are updated accordingly.

Each review section rating requiring calibration now has an overridden rating and when viewing the list of employees associated with the review in the list in the Performance Hub, their status is indicated as **Calibrated**.

The reviews can now be revised by the direct manager and the employee and subsequently the calibration owner can end the calibration process.

## Ending Calibration

Once employees' review scores have been calibrated, the performance reviews can progress to the Revision step.

Calibration can be ended using one of two options: Finish Calibration or Complete Calibration. Finish Calibration is a batch action that takes all employee reviews associated with the review request and moves them to the Revision step. Finish Calibration is a batch action available to the calibration owner from the Performance Hub, that moves all employees associated with a review request to the Revision step. Complete Calibration is available to HR Administrators and calibration owners, who can select specific employees to move to the next step.



**Note:** When finishing or completing calibration you must ensure that each employee has been given a calibrated rating for each section of the review used for calibration.

Once the calibration phase is over, employees and managers can finish writing reviews that were still in draft stage, when calibration was launched. The Employee Review Status is indicated as Calibrated and the employee's direct managers will then receive tasks for completing the revision process.

During the revision process, managers can add comments to any items; however, ratings that were used for calibration are locked down and displayed in read only. Sections and items that were not used for calibration can still have their ratings changed. Once revisions are done they have a status of Revised, the reviews can be progressed to the next stage of the workflow, such as Approve or Release.

## To End Calibration

You must be the calibration owner for the review request and it must have the Calibration step in its workflow.

### Performance > [Navigation bar] More dropdown > Team Reviews

1. Select the **Review Cycle** and **Review Request** you want to end calibration and click the Refresh icon.

It is possible that no employees are displayed. This does not prevent launching calibration.

2. Click **Finish Calibration**.

A message is displayed indicating how many employees will be moved from the calibration step to the complete revision step.

3. Click **OK**.

A message is displayed indicating you can see the progress of the action from **Show Process History**.

The reviews have been moved to the next step in the review workflow, which will be either *Release* or *Approve*.

## Adjusting a Review During its Approval

Adjusting a review during its approval allows an HR administrator to make changes to the review.

For an HR administrator to be entitled to edit a review, the calibrator settings granting those permissions must be active.

### [Navigation bar] > HR Administration dropdown > All Reviews

1. Select the filters that will display the desired review.
2. In the result grid, click the name of the employee whose review you want to adjust.
3. Once the Performance Review page is displayed, go to the section of the review to be edited and make the desired change.

If edits are not possible, this means that you have not been granted with calibrator rights.

4. If Performance is configured to run a Language Check, it can be selected from the Actions menu.  
The language contained within free text fields of the review can be checked manually for inappropriate phrases.
5. Once all changes made, click Save.

The performance review will show the changes made.

## Requesting Additional Ratings

Requesting additional ratings from other raters is similar to requesting feedback for a goal, competency or custom item: the purpose is to help you better evaluate an employee's performance. The ratings the raters provide are included in the review.

The Request Multi-Rater setting must be selected in the review request. The Request Multi-Rater feature is then available for selection in the Actions menu.

1. Open the performance review for which you want other people to submit ratings.
2. In the **Actions** menu, click **Request Multi-Rater**.
3. In the Request Feedback window, click To... to select a recipient for your feedback request.
4. Click the calendar icon and then click the due date.
5. To change the priority, click the current priority value and then click a new value from the list.
6. Check the check box next to the items for which you want feedback.
7. As needed, enter a comment or edit the default one (if one is provided), and format the text with the available editing options.

## 8. Click Send Request.

The recipients receive a feedback request in My Tasks. As recipients provide a rating for each of the requested items and send the feedback, the ratings and any comments the raters might have included are displayed in your Feedback panel of the review and in the review form.

# Collaborators Participating in Review Writing

When an employee is designated as a review collaborator by an employee's manager, that employee can participate in the review writing process.

Users who manage reviews can now have other employees collaborating in the review writing process by making them collaborators. Compared to review raters, who mainly provide comments via feedback requests (not part of the review itself), review collaborators are entitled to enter comments right into the review form.

To be entitled to participate and edit a review, users other than the employee and the employee's manager must be made collaborators, even matrix managers.

Therefore, for matrix management purposes, matrix managers must also be review collaborators. Depending on when the matrix management relationship was established, there are two possibilities:

- If the matrix management relationship was created prior to review generation, the system automatically makes the matrix manager a collaborator.
- If the matrix management relationship was created after review generation, the system does not automatically make the matrix manager a collaborator. The user has to manually add the matrix manager as a collaborator.

When the system is about to generate reviews according to the review definition, review cycles, and review request configurations, it proceeds as follows:

- The system creates the reviews.
- For each review, the system assigns the employee and manager author of the review.
- The system verifies if there are matrix managers for the selected employee.
  - If the system finds that matrix managers currently have access to the employee, the system designates those matrix managers as collaborators of the review.
- The system completes the creation of the review.
- The system updates the security relationships for this new employee review. Collaborators have ownership on the review as the manager author and the employee do. Matrix managers have matrix management access.

When a review has multiple participants, which could be the primary manager and collaborators, all users can work simultaneously on the review. However, it is the first user who saves that will have his changes saved. The second user who attempts to save will be prompted with a message informing him that the review has been updated by another user and that he needs to refresh the review before making/saving his changes.

Review collaborators can be added or removed via the Manage Review Collaborators action.

## **Task Assignment**

When a collaborator is added to a review and asked to participate in the review writing process, he gets informed of the tasks to perform via his Task List. Two tasks can be assigned:

- Write Employee Review - when the review is still in a Draft status and not yet submitted for approval and also when the review has been resent to the employee and reset to Draft by the manager
- Reopen for Approval - when the review has been rejected and resent to the manager.

The task is assigned when the review is generated and collaborators are already present, or when collaborators are later manually added to the review.

Following is a table listing all the actions than can be performed by matrix managers versus those allowed to review collaborators.

<b>Review Collaborators v. Matrix Managers</b>		
<b>Task or Action</b>	<b>Tasks that can be done by a collaborator</b>	<b>Tasks that can be done by a matrix manager*</b>
Write Employee Review (initial, rejected or restarted review)	Yes	No
Submit for Approval	No	Yes
Reopen for Approval	No	Yes
Decide on Approval	No	No (Unless the matrix manager is defined as an approver in the review workflow or the original approver has delegated his tasks to this matrix manager.)
Release Employee Review	No	Yes
Request Acknowledgment	No	Yes
Acknowledgment	No	No (The matrix manager cannot acknowledge the review on behalf of the employee even if the "Allow manager to override employee acknowledgment" setting is active in review process definition.)
Send Review Back to Employee	No	Yes
Cancel Review	No	No
Transfer Review	No	No
Manage Review Collaborators	No	No
Notified of task 'Write Employee Review' or 'Reopen for Approval' via Task List	Yes	Yes
Notified of task 'Submit for Approval', 'Release', 'Request Acknowledgment' or 'Close' via Task List	No	Yes

Note that if a matrix relationship is created before review generation, the matrix manager is automatically added as a review collaborator and therefore be able to perform the tasks allowed to collaborators.

## Configuration

For users to be entitled to manage collaborators, they need to have the following user type permissions:

Permissions Configuration > [SmartOrg] Administration > [Users] User Accounts	
Permission Name	Setting Description
Performance > Performance Reviews > View	This viewing permission allows the user to view performance reviews.
Performance > Performance Reviews > Manage	This managing permission allows the user to manage performance reviews, which is required to perform review rating calibration.

For users to be entitled to act as collaborators, they need to have the above mentioned user type permissions, and more precisely with the following condition:

- If this user is one of the authors

## To Add a Review Collaborator

A review collaborator is added by an employee's manager so that person can participate in the writing process of the review.

### Performance > [Navigation bar] Reviews

#### Performance > [Navigation bar] Reviews

1. Open the performance review you want to add collaborators to.
2. From the **Actions** menu, select **Manage Review Collaborators**.
3. In the **Manage Review Collaborators** window, click the Plus icon.
4. In the **People Selector** window:
  - a. Select the search options required to find the desired people.
  - b. Select the desired collaborators in the **Search Results** box.
  - c. Click the Right Arrow icon to add them to the **Selection** box.
  - d. If you want to automatically add the direct reports of the selected persons, check the **Include Direct Reports** option.
  - e. Click **Select**.
5. Back to the **Manage Review Collaborators** window, click **OK**.

The collaborator will be informed of the task to do via the Task List.

## To Remove a Review Collaborator

A review collaborator is removed by an employee's manager so that person can no longer participate in the writing process of the review.

### Performance > [Navigation bar] Reviews

#### Performance > [Navigation bar] Reviews

1. Open the performance review from which you want to remove one or multiple collaborators.

2. From the **Actions** list, select **Manage Review Collaborators**.
3. In the **Manage Review Collaborators** window, select the collaborators to remove by checking the related checkbox and click the Minus icon.
4. Click **OK** to close the window and return to the performance review.

## Comparing Review Information

A manager can compare competencies, summary section ratings, items that were configured to be part of a custom section and overall ratings for different groups of employees.

Only managers can perform comparisons when they are completing an employee's performance review.

1. Open the performance review of the employee you want to compare to other employees.
2. From TOC select the item to be compared, such a goal or competency.
3. Click Compare and additional information and options are displayed.
4. Specify the group of employees to which you want to compare the current employee.
5. As needed, click the desired Include option.

The list of employees to whom the current employee is compared and the ratings that correspond to the selected item are displayed.

## Performance Review Administration

### Printable Performance Review

A PDF version of an employee's performance review is offered to provide a printable version of the review for a given period. The printout can show all sections or specific ones and can be printed as a form to be completed.

The printable version is offered to users to print their own performance review or the reviews of their direct reports, if applicable, by simply clicking on the print icon.

Print options are available to allow the user to choose the sections and information to print and provides an option to display the printed review as a form to be manually completed. When the setting Display empty rating and comment fields is selected, the review is printed with blank spaces for comments and ratings.

By default, all review sections are selected to be printed, except for the History section. The item name, description, rating and comments are always included and cannot be excluded from the printed review. However, the other information is optional.

The sections offered to be printed are presented in the same order as in the review itself. Also, depending on the review's configuration and settings, some sections might not be displayed as not part of the review. The following table lists the review settings related to each possible section to be displayed.

Printable Section or Option	Description
Overview section	Section that is always offered as a print option as there is related setting.

Printable Section or Option	Description
Overall Summary section	Print option that is only offered if the <b>Show Summary</b> setting in the Review Definition configuration is active.
History section	Print option that is only offered if the <b>Allow to View History Section</b> setting by rater type in the Review Definition configuration is active.
Name of each section in the review	All sections other than Overview, Overall Summary and History that are included in the review are shown as print options and be selected to be printed or not.
Item name, description, rating and comments	For each item in the review, the name, description, rating and related comments are always printed.
Instructions option	Print option that is always offered as there is not related setting.
Feedback option	Print option that is always offered as there is not related setting. ***Take note that the Feedback option includes multi-rater only for the manager. The employee does not have the ability to view multi-rater feedback. Other feedback however may be viewed by the employee.
Additional Information option	Print option that is always offered as there is not related setting.
Summary Section Grid option	Print option that is always offered as there is not related setting.
Display empty rating and comments fields	Print option that provides the ability to print the review as a form to be manually completed, with empty spaces for entering the ratings and comments.

The PDF version of the review provides the following printing possibilities:

- Includes the company logo
- Includes the page numbers
- Provides the ability to print a short version of the review, with only the following:
  - Item name
  - Item definition
  - Item rating
  - Item comments
- Provides the ability to select the review sections to be printed.
- Provides the ability to display the review as a form to allow the user to enter ratings and comments directly on the printed version.

## Printing a Performance Review

Printing a performance review can be performed for any performance review and at any point in time. The printed version of the review shows all the information contained in the review, except if the print format has been configured to hide the review instructions, rating models and/or summary lists. The information shown reflects the review at its current workflow step.

To see a print preview of a performance review and print the review, Adobe Acrobat Reader must be installed on your computer.

1. Open the performance review you want to print and click the print icon.

2. In the Print Options window, select the sections and the information that you want to include in the printed review.  
If you want to print the review in order to complete it in writing, make sure you select **Display empty rating and comment fields**.
3. Click Print.
4. Acrobat Reader opens and displays the performance review as a PDF file. To print the review, click the “printer” icon in Acrobat Reader.

Acrobat Reader prints the performance review. While the review is displayed, you can perform any of the functions available in Acrobat Reader.

## Managing Goal Information in Performance Reviews

As goal plans provide the foundation for performance reviews, you can view and sometimes edit goal items from the review.

### Managing Goals within a Performance Review

Managing goals within a performance review involves creating and adding new goals to be evaluated in a performance review, and editing or deleting existing ones.

The necessary permissions must have been granted when the corresponding review section was configured. Furthermore, because the permissions to add (or create), edit and delete goals are granted separately, you might be able to perform some tasks but not others.

1. Open the performance review whose goals you want to manage.
2. From the TOC, click the name of the relevant goal section.
3. From the Review tab for the section, click Manage Section Items.
4. The Manage Goals Section window is displayed and you can perform any of the following steps.
  - o To create a new goal, click Create.
  - o To add a new goal, click Add.
  - o To delete a goal, click the enclosed X icon.
  - o To edit a goal, click the Pencil and Paper icon.

If you are adding a new goal, a selector page opens. You can select the new goal from the list displayed.

If you are creating a new goal, a creation page opens. Enter the information requested on the page.

If you are deleting a goal, a message asks you to confirm the deletion.

If you are editing a goal, an editing page opens in which you can make your changes.

5. Click Done (this step is not applicable if you are deleting a goal).

Your changes are displayed in the relevant goal section.

### Managing Competencies within a Performance Review

Managing competencies within a performance review is confined to adding competencies to a performance review or removing competencies from a review.

The necessary permissions must have been granted when the review section was configured. Furthermore, since the permissions to add and remove are granted separately, you might have the permission required to perform one task and not the other.

Note that competencies cannot be created or edited.

1. Open the performance review for which you want to manage competencies.
2. From the TOC, click the name of the relevant competencies section.
3. From the Review tab for the section, click Manage Section Items.
4. The Competencies Section window is displayed, click Add to add a new competency or click the enclosed X icon to remove a competency.

If you are adding a new competency, you can select one or more competencies using the Competency Selector.

If you are removing a competency, a message will ask you to confirm the deletion.

5. If you selected a competency in the previous step, click Done.

The change is reflected in the corresponding competency section.

## Managing Custom Items within a Performance Review

Managing custom items within a performance review involves the creation of new custom items to be evaluated in a performance review, or editing or delete existing custom items.

The necessary permissions must have been granted when the review section was configured. Furthermore, since the permissions to add (or create), edit and delete are granted separately, you might have the permissions to perform some tasks but not others.

Note that even if you are granted the permission to add items, you can only create new custom items, not add some from a list of existing items.

1. Open the performance review whose custom items you want to manage.
2. From the TOC, click the name of the relevant custom section.
3. From the Review tab for the custom section, click Manage Section Items.
4. In the Manage Custom Section window you can perform any of the following steps.
  - o To create a new item, click Create. On the creation page that opens, enter the information requested and click Done.
  - o To add a new item, click Add.
  - o To delete an item, click the enclosed X icon. You will then need to confirm the deletion.
  - o To edit an item, click the Pencil and Paper icon. In the editor page, make the desired changes and click Done.

The change made is reflected in the relevant custom section.

## Viewing Goal Feedback in a Review

Feedback provided on a goal that is part of a performance review can be seen directly in the review.

Goals need to be set to be populated into the reviews for the related feedback to be displayed.

### Performance > Performance Review

1. Open a performance review.
2. Click the Tools icon to expand the Tools panel.
3. Click Feedback to open the corresponding panel.

4. In the TOC, click the item for which you want to view feedback that might have been provided.  
Note that if no feedback has been provided, you might want to request feedback by clicking the Person and Thought Bubble icon.
5. If there is feedback, it is displayed in the Feedback panel along with the name and job title of the person who provided the feedback, the date of the feedback, the rating given (if any), and comments (if any).
  - o To view the entire content of the feedback, double-click the feedback text in the Feedback panel.  
Close the Feedback window when you are finished consulting the feedback.  
If desired, you can ask for more feedback, as in step 4.
6. To close the Feedback panel, click the Hide Tools link.

## Viewing the Alignment of a Goal in a Performance Review

Viewing the alignment of a goal that is part of a performance review, you can see (from within the performance review) the organizational efforts that support the goal.

To view the alignment of a goal, the related review section setting must be activated for the link to be displayed. Furthermore, the goal must have been auto-populated in the review from the employee's goal plan and not created dynamically in the review itself.

1. Open a performance review.
2. From the TOC, select a goal to display it in the Review tab.
3. Scroll to the Alignment section to view the details.

If applicable, the alignment of the goal is displayed and hovering over the items will provide more information.

## Review Analytics

The Review Analytics option of the HR Administrator Tools panel allow HR administrators to view statistics on review cycles, review requests, review statuses, reviews and review generation errors.

When selecting the Review Analytics option from the HR Administration Tools panel, the first page to be displayed is the Review Cycle Analytics page, which shows a list of all the review requests in the selected review cycle, along with the number of reviews and errors in each. Then, clicking on a given number of reviews or on a given number of errors opens the related page, either the Performance Reviews or the Review Generation Errors page.

- **Review Cycle Analytics** - This is the default view displayed when selecting Review Analytics from the HR Administration Tools panel, which lists the review requests that are part of the review cycle specified in the filter. By default, the review cycle selected is the first one in the alphabetical list of all existing review cycles in the system. This view gives access to all other views.
- **Review Request Analytics by Status** - This view shows the distribution of review statuses and the number of reviews in each for the review request selected from the Review Cycle Analytics page. Clicking on the hyperlinked count of reviews displays the corresponding reviews.
- **Review Request Analytics by Rating** - This view shows the distribution of review overall ratings and the number of reviews in each for the review request selected from the Review Cycle Analytics page. Clicking on the hyperlinked count of reviews displays the corresponding reviews.
- **Performance Reviews** - This view lists the employees for which a performance review is in the status selected from the Review Request Analytics page. Clicking on an employee's name from that page opens the entire employee's performance review.

- **Review Generation Errors** - This view lists the error messages that were generated for the review request selected from the Review Cycle Analytics page. Clicking on the name of an employee opens a window showing details about the error, such as the error date and the error stack. From the detail page, all error details can easily be copied to the Clipboard in a single click and then pasted in any desired output.

All views provide various filters to refine the information.

## Viewing Review Cycle Analytics

Viewing review cycle analytics allows an HR administrator to view, for a given review cycle, a list of the associated review requests, as well as the number of reviews and errors each review request contains.

### HR Administration Tools > Review Analytics

1. From the filter panel, select the review cycle associated to the desired review request.  
Use the Clear or Refresh buttons to either remove all selected filters or to launch a search with new filters.
2. From the Review Request column, select the Action menu and then Show Statuses for the required review request name, to see the distribution of reviews by statuses.  
By default, the selected filter corresponds to the first review request in the alphabetical list of all existing review cycles in the system. This view gives access to all other views.

## Viewing Review Request Analytics

Viewing review request analytics allows an HR administrator to view the distribution of reviews in a given review request either by review statuses or by review ratings, along with the number of reviews for each status or rating. Clicking on the hyperlinked count of reviews displays the corresponding reviews.

### HR Administration Tools > Review Analytics

1. From the filter panel, select the review cycle associated to the desired review request.  
Use the Clear or Refresh buttons to either remove all selected filters or to launch a search with new filters.
2. In the result grid of the Review Cycle Analytics page, open the review request drop-down menu to select whether to display reviews by statuses or by ratings.
3. In the result grid of the Review Request Analytics by Status or by Rating page, click on a given number of review to see the related reviews.

## Viewing Review Generation Errors

Viewing review generation errors allows an HR administrator to view a list of error messages that were generated for a given review request.

### HR Administration Tools > Review Analytics

1. From the filter panel, select the review cycle associated to the desired review request.  
Use the Clear or Refresh buttons to either remove all selected filters or to launch a search with new filters.
2. In the result grid of the Review Cycle Analytics page, click the number in the Errors column associated to the desired review request.
3. In the result grid of the Generation Errors page, click on the name of the employee to see details about the error, such as the error date and the error stack.
4. From the detail window, all error details can easily be copied to the Clipboard in a single click and then pasted in any desired output.
5. Close the detail window.

## Review Transfer

A review transfer can be performed by a manager or by an HR administrator when an employee changes job, when a manager is unavailable to perform a review or when a review is sent to a delegate.

When a review is transferred, both the review form and the review process are kept intact (with the exceptions of the actual authorship change) - all items that had been added, edited or deleted are preserved. The only things that can be cleared are the manager ratings and comments, depending on the company setting Delete Manager's Ratings And Comments On Transfer. This setting offers the possibility to always or never delete ratings and comments or to ask the user what should be done at the time of transfer. However, if the manager's review of the employee is completed, this setting is ignored and the manager entries are preserved.

Feedback requests can also be canceled when a review is transferred, based on the company setting Cancel Pending Multi-Rater Requests On Transfer. If there are any outstanding feedback on multi-rater requests from the manager at the time the review is transferred, they can be canceled. Any feedback gathered by the previous manager will not be accessible/viewable by the new manager.

It is important to know that an employee review cannot be transferred if it has been CLOSED or CANCELLED. If such a transfer is attempted, an error message indicating why the transfer could not be performed will be displayed.

If the current task in the workflow process of the review is assigned to the "current manager", in the transfer, it will be reassigned to the new manager/author and any subsequent tasks for the "current manager" will be assigned to the new manager/author. (Note: The new author is not required to be the new manager of the employee.)

## Configuration

There are two settings related to review transfers: Delete Manager's Ratings And Comments On Transfer and Cancel Pending Multi-Rater Requests On Transfer, both set to Always by default.

These two settings only have value if the review is in a Draft status. If the manager has already submitted the review, these settings have no effect.

## Transferring a Performance Review

Transferring a performance review allows managers and HR administrators to transfer an employee's review to another manager.

The review request must be configured to allow transfers. Reviews that are closed or canceled cannot be transferred.

1. Open or select the checkbox beside the performance review you want to transfer.
  - o If you are a manager, access the review via the Navigation bar, More dropdown, Team Reviews link.
  - o If you are an HR administrator, access the review via the Navigation bar, HR Administration dropdown, All Reviews link.
2. Click Transfer Review from the Actions menu.
3. In the Transfer Review window, select the employee to whom you want to transfer the review.
4. If the value of the Delete Manager's Ratings And Comments On Transfer and/or Cancel Pending Multi-Rater Requests On Transfer product settings was set to Ask user, you will need to specify what is your preference by selecting the desired options. If however, the value of these settings is set to either Always or Never, a message will be displayed to inform you of the actions that will be performed upon transfer of the review.

A new task is displayed in the task list of the manager to whom the performance review was transferred. The performance review status is set to Draft.

## Language Check

A language check for free-text fields scans for inappropriate, discriminatory, or offensive text within employee reviews.

Language Check is a tool to search free text fields in a review for words that would be considered inappropriate. Free text fields to be scanned include, comments at overall, section, or item levels. For each word or phrase found in a Language Check Dictionary, a warning message displays to users enabling, but not requiring, modification to the text and automatically saving the change.

Language Check can be initiated in the following ways:

- **Automatic:** At review submission, the manager is prompted to run Language Check. Free text fields can be modified.
- **Manually:** Can be run by managers or others within the approval chain. If scan is available to users who cannot edit the review, the scan wizard is read only.

The Language Check Dictionary can be updated through Taleo Connect Client (TCC). The content of the dictionary can be exported using TCC. Organizations can then modify the content, outside of Oracle Taleo Enterprise Edition applications. Once imported through TCC, the new content will be available in the application. This feature allows organizations to add words and phrases to existing categories, add and modify new categories, or change the suggested text.



**Note:** The Language Check feature does not guarantee or ensure that no legal action will be brought against an organization as a result of an employee's review. It is a tool to reduce risk.

A well-meaning manager adds an overall comment to an employee review that says, "Jane is well liked in her department. She has become a mother figure to the entire group." This statement could be considered gender and age biased. The Language Check wizard would stop on the word "mother" because it was defined in the dictionary as a trigger. The wizard would suggest removing the word "mother" and possibly replacing the phrase with wording that indicated the employee was respected.

## Configuration

The following settings must be enabled for each review cycle:

Settings	
Name	Location
Enable Manual Legal Scan	Configuration > [Taleo Performance] Administration > [Performance Reviews] Review Cycles
Enable Automatic Legal Scan	Configuration > [Taleo Performance] Administration > [Performance Reviews] Review Cycles

## Progressing the Review Workflow

HR administrators can intervene and move reviews from one status to another.

If for some reason a review cannot be progressed along the review workflow by the manager and the employee, an HR administrator can complete batch actions and restart review workflows when necessary.

The Performance Review workflow displays the current task owners for the current step tasks of the workflow to prevent the review from getting held up. If for whatever reason a review gets halted in the workflow, users can identify with whom to follow up with to resolve the issue.

### Review Batch Actions

When performance reviews are accessed via the Team Reviews or via the HR Administration Tools, it is possible to view a group of reviews and to act upon them in batch.

Review actions that can be performed individually on a single review can also be performed in batch via the performance review list view, where filters provide the ability to find a specific group of reviews requiring action.

The way the batch process is performed is slightly different depending on the way the selection is done.

- **Selection of more than one review (but not all reviews)** - The action menu offers all possible actions that may be taken on the selected reviews. When this option is selected, the user has the ability to enter a comment that applies to all transactions that are processed. The batch history will confirm if all transactions passed or if the action failed on any item.
- **Selection of all reviews** - If the user chooses to select all reviews, the application prompts if the action should be conducted on all reviews displayed on the page or on all reviews that meet the filter criteria - It then displays the results of the action in the batch history.

A batch action can be performed on a maximum of 1000 reviews. If the results of the review selection exceeds 1000, a message prompts the user to refine his search to reduce the number of results.

When a user selects a large population, it is possible that the selected reviews are in different status (draft, submitted for approval, ready to be released, etc.). The batch actions that are available in the menu are the ones that can be performed on any reviews selected on the page.

The review actions that can be performed in batch depend on the viewing mode.

#### List view

- **All review workflow actions** - All steps included in the workflow process definition can be completed in batch, except for the completion of the self-assessment, which can only be performed by the employee. The possible actions include: Write Employee Review, Release, Request Acknowledgment, Acknowledge, Complete Revision, Launch Calibration, Finish Calibration, Complete Calibration, Submit for Approval, Approve, Reject and Close. The selected action will apply to only those reviews that are in the appropriate step of the review workflow. For example, a manager can only write an employee's review for reviews that are in draft. Furthermore, the user must be the task assignee to perform the review workflow action - so this user can be the main task participant, a matrix manager for which he has been delegated tasks, or an HR administrator. These batch actions are also available via the HR Administration Tools.
- **Decide on Approval** - From the list view, it is possible to decide on the approval of the selected reviews. The user must be the task assignee to complete the action. Therefore, if the user does not have an approval task request, the action will not be available.

- **Transfer** - The selected reviews can be transferred to another user.
- **Cancel** - The selected reviews can be canceled.
- **Send Review Back to Employee** (for a manager) or **Reset Review to Draft** (for an HR administrator)

**Matrix view** (only available when accessed via the Team Reviews)

- Shows total and unrated population.
- Update Metrics - After moving employees from one cell to another, the changes made to the over-ridable employee metrics can be saved as the true metric values.
- Show Details - This action opens another window that displays the detailed information available for the cell.

**Chart view** (only available when accessed via the Team Reviews.)

- Shows total and unrated population, as well as the organization and chart average.
- Show Details - This action opens another window that displays the detailed information available for the bar. Double-clicking on the bar also opens the bar details.

Updating metrics, performing calibration, and viewing unrated individuals are performed at the bar detail level; however, calibration can also be completed from the main chart level and you are not required to drill-down.

## Configuration

This feature is automatic and requires no activation. The user however needs to have specific permissions.

Permissions Configuration > [SmartOrg] Administration > [Users] User Accounts	
Permission Name	Setting Description
Performance > Performance Reviews > Access via Manager Center	This permission grants the user access to Team Review link, which gives access to the performance review management view. In addition, the proper performance review user type permission has to be granted to grant viewing and/or managing rights to performance reviews.
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 > Manage	When no constraint is selected, the user has write access to all employee reviews, current or not. This permission is also required to perform review rating calibration.
Performance > Performance Reviews > Access administration tools	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.

## Review Workflow Restart

This feature provides the ability to revert the review process back to draft step so that the employee and/or the manager may change a review after it has been submitted.

The ability to restart the review workflow process is available to the manager author of the review and to HR administrators. When the review process is set back to a draft status, all comments, ratings and any information entered previously by the users are maintained.

For the manager, the action is called 'Send Review Back to Employee'. When this action has been allowed to managers in the review request, this action is available to the manager before completing the employee's review, that is when the employee has completed and submitted the self-assessment. For managers, this means that they will be able to send a review back to an employee in case the review comments, ratings or any information is inadequate.

For the HR administrator, the action is called 'Reset Review to Draft'. This action is always available for administrators when accessing the HR Administrative Tools and can be performed at any workflow step of the review, except when the review is in draft. When this action is performed, the review is set back to the writing step for both the manager and the employee. For HR administrators, this feature provides the ability to reset the review to a draft status, for both the manager and the employee, so that they can revise the review content. With this feature, HR administrators are also able to open a closed review to revise its ratings or comments in case the ratings get challenged or to address a legal issue.



**Note:** HR Admin users can send a Closed review back to draft, but they cannot send a Canceled review back to draft.

Whether performed by a manager or an HR administrator, the due date of a review step is adjusted automatically if the due date was configured to be a period of time, that is due in a given number of days. However, the due date is not adjusted if the step's due date is configured as a fixed date.

An employee has completed and submitted his self-assessment. His manager has received the self-assessment but finds that the employee has not provided enough details and explanations to justify his ratings. The manager decides to send the review back to the employee so he can provide the missing information. The employee gets a new notification to write his self-assessment. He will then have to fill in the missing information and submit his self-assessment again. Since the time granted to write the self-assessment was a period of time (3 days) and not by a fixed date, the due date for writing the self-assessment will be adjusted accordingly, based on the current date; if the due date had been a specific date, no updates would have been done.

## Configuration

This feature is optional and requires the related setting to be activated.

For managers to be entitled to send back reviews to employees, the review request associated with the reviews needs to allow this action. This action is granted by the following setting:

Setting	Location
Allow Manager to Restart Review Workflow	<b>Configuration &gt; [Taleo Performance] Administration &gt; [Performance Reviews] Review Cycles</b> <ul style="list-style-type: none"> <li>• Select a review cycle</li> <li>• Select the desired review request</li> <li>• In the Settings section, this setting must be active</li> </ul>

## Canceling a Performance Review

Canceling a performance review allows an HR administrator to cancel an employee's performance review.

HR administrators are entitled to cancel a review at any time.

## HR Administration Tools > Performance Review

1. Filter the approval requests in order to view the desired review.
2. In the list, click the right arrow icon next to the name of the corresponding employee to open the Actions menu and select Cancel Review.
3. When asked to confirm the cancellation, click OK.

A message window will be displayed to indicate whether the action was performed successfully.

Once canceled, the performance review shows a Canceled status.

## Forcing the Completion of a Task

Forcing the completion of a task allows an HR administrator to force a performance review to proceed to the next step in the process.

## HR Administration Tools > Performance Review

1. Filter the approval requests in order to view the desired review.
2. In the list, click the right arrow icon next to the name of the corresponding employee to open the Actions menu and select Complete (name of the current task).
3. In the task related window, enter a comment if needed and click OK.

A message window will be displayed to indicate whether the action was performed successfully.

Once the current step completed, the performance review proceeds to the next step in the process, as defined in the process definition.

## To Reset a Review to a Draft Status

This task can be performed by an HR administrator for any review and for any review status.

## Performance > [Navigation bar] > HR Admin > All Reviews

1. From the **Performance Reviews** page, find and open the desired review or the group of reviews you want to reset to Draft.
2. Depending on whether you have selected one or multiple reviews, do one of the following:
  - o Open the desired review and from the Performance Review page, select the **Reset Review to Draft** from the **Actions** pull-down list.
  - o From the list of performance reviews, check the review or the reviews you want to act upon and select the **Reset Review to Draft** from the **Actions** pull-down list.
3. When prompted to confirm, click **Yes**.

The reviews might not be reset immediately. To see the status of the action, click **Show Process History**.

- o If the selected reviews were restarted, the status will be **Completed**.
- o If some of the selected reviews can not be restarted, a **Partial Action** window will open to inform you of the employee(s) for whom the task could not be performed and ask whether you want to proceed with the others.

The selected review(s) will be set back to a Draft status. The employee and manager will get a new task to complete the review.

## Self-Assessment Mass Submit

Administrators have the ability to submit self-assessments enabling the advancement of the review workflow using TCC.

Because progression of the review workflow is dependent on self-assessments being closed, Administrators have the ability to submit open self-assessments using Taleo Connect Client (TCC). An assessment can remain open for a number of reasons whether it be that the manager is unavailable or the employee has left the company. Giving Administrators the option to submit the open assessments prevents an obstacle in the review workflow process as well as prevents users for which self-assessments are not required from having an overdue task to complete their self assessment.

A new Self-Assessment section has been added to the Review History tab to provide an audit trail and history for all self assessment events. The submission of assessments through TCC will be reflected in the Review History tab.

For more detailed information on using TCC, refer to the Oracle Taleo Enterprise Edition Integration Taleo Connect Client User Guide Feature Pack 15A and onward.

## Target Rating of Competencies Shown in Review

When competencies are imported from an employee's job role, the performance review can show the rating to be attained for each competency in the context of the employee's specific job.

The display of target ratings in performance reviews is possible only for those competencies that are automatically imported from the employee's job role. Therefore, in a review, it is possible that some competencies don't show a target rating as the competency is not drawn from the job role and was not automatically added to the review.

When target ratings are configured to display, they only show once the review is released, in the detail page of the review item, right under the rating provided by the manager.

This feature allows the manager and the employee to see the actual manager rating in contrast with the desired target rating and observe any gaps between the two. The value of the target rating uses the same rating model as the rating selector.

### Configuration

By default, target ratings are not set to show. For target ratings to show in performance reviews, configuration is required and multiple conditions must be met.

- Target ratings may be displayed only for those competencies that have a target rating specified at the job role level.
  - **Configuration > [SmartOrg] Administration > [Job Roles] Job Roles**
- The review must be set up to include a competency type review section that includes competencies from the related job role. The option to show target ratings must be selected.
  - **Configuration > [Taleo Performance] Administration > [Performance Reviews] Review Definitions** , select a review definition.
- The review workflow process defined in the review cycle must have a Release and/or Acknowledge step.
  - **Configuration > [Taleo Performance] Administration > [Performance Reviews] Review Cycles** , select a review cycle, then a review request to configure the process definition so it includes a Release and/or Acknowledge step.

## Performance Review Fields and Buttons

All fields related to Performance Reviews in Performance are presented in the table below, along with a description and related possible values, when predefined. Each field also indicates the type of information it applies to and the related header. **IMPORTANT** - Since most of the fields presented in a performance review are configurable and can be set to be shown or not, it is possible that some fields do not show in a given review.

Field	Description	Applicable to	Header
Acknowledge	Optional workflow step done by the employee only that usually follows a review meeting and where the employee indicates his agreement with the review.	Performance Review	Workflow Status Bar
Acknowledge Date	Date the employee acknowledged the review meeting.	Performance Review	Review Meeting
Actual	Actual progression value of the goal. This field applies to goals only.	Performance Review	Review Section
Approve	Optional workflow step done by the designated approver(s) who verify the accuracy and suitability of the review. Depending on the review request configuration, this step might not be part of the process definition, therefore not showing.	Performance Review	Workflow Status Bar
Author	Name of the author of the review, which corresponds to the employee, in the case of a self-assessment, or to the manager, in the case of employee performance review.	Performance Review	General Information -Current Review
Author ID	Identification number of the author of the review.	Performance Review	General Information -Current Review
Author Job Title	Job title of the author of the review.	Performance Review	General Information -Current Review
Business Unit	Business unit of the employee.	Performance Review	General Information - Employee Information
By	Name of the user who performed the event.	Performance Review	History
Close	Mandatory workflow step done by the manager and/or the employee that ends the review process. This step is always part of the process definition but might not show up in the workflow status if configured to be executed automatically.	Performance Review	Workflow Status Bar
Closed Date	Date the review was closed.	Performance Review	Final Comment

Field	Description	Applicable to	Header
Comments	Editing box used for entering comments related to the rating. To open the Comments box, double-click in the box.	Performance Review	Review Section
Comments	Section that can contain the manager's and/or the employee's comments about the review overall rating.	Performance Review	Summary
Compare	Action button that allows the manager to compare various elements in the current review with other those of other employees. The comparison can be done with various employees, depending on the selection made. This button only shows to managers.	Performance Review	Review Section
Compare with	Option list that allows to select the type of employees to compare the current review to.	Performance Review	Compare feature
Current Step	Name of the task related to the current step in the review's workflow process.	Performance Review	General Information -Current Review
Current Step Due	Date the step in progress is due. This date is determined from the date the task is assigned and the duration allowed to complete the task, as per the review request configuration.	Performance Review	General Information -Current Review
Date and Time	Date and time the event occurred.	Performance Review	History
Definition Code	Code of the review definition used as the performance review.	Performance Review	General Information -Current Review
Definition Title	Title given to the review definition when configured.	Performance Review	General Information -Current Review
Department	Department of the employee.	Performance Review	General Information - Employee Information
Details	Short description of the event performed on the review.	Performance Review	History
Employee ID	Identification number of the employee.	Performance Review	General Information - Employee Information
Employee Information	Section of the Overview that displays information about the employee whose review is in display. Use the Show Details or Hide Details to show or hide the information.	Performance Review	General Information
Employee's Comments	Comments provided by the employee when closing the review.	Performance Review	Final Comment

Field	Description	Applicable to	Header
Employee's Comments	Comments provided by the employee in regards to the review meeting.	Performance Review	Review Meeting
Employee's Self Rating	Rating given by the employee for his self-assessment of the goal, competency or custom item.	Performance Review	Review Section
Event	Name of the event performed on the review. The list of events are related to the various steps in the review workflow, such as Review Closed, Review Assigned, Review Under Approval, etc.	Performance Review	History
Final Comment	Review section that always shows when the review is closed and that indicates the date and comments provided by the participants when the review was closed. The Final Comment section shows on the left panel menu.	Performance Review	Final Comment
From ... to ...	Start and end dates that correspond to the review's cycle.	Performance Review	Workflow Status Bar
General Information	Section of the Overview that displays general information about the review. Use the Show Details or Hide Details to show or hide the information.	Performance Review	General Information
Highest	Highest rating indicator.	Performance Review	Review Section
History	Review section that shows a list of the events that have occurred on the review. The History section is by default always displayed to calibrators and managers but not to employees. The related settings are defined during review configuration. When displayed, the History section shows on the left panel menu.	Performance Review	History
Include Indirect Reports	Checkbox that allows to include in the review comparison the indirect reports.	Performance Review	Compare feature
Include Self-Evaluation Ratings	Checkbox that allows to include in the review comparison the ratings from the employees self-assessments.	Performance Review	Compare feature
Job Field	Job field of the employee.	Performance Review	General Information - Employee Information
Job Level	Job level of the employee.	Performance Review	General Information - Employee Information
Job Title	Job title of the employee.	Performance Review	General Information - Employee Information

Field	Description	Applicable to	Header
Last Modified Date	Date of the last change made to the review.	Performance Review	Review Meeting
Lowest	Lowest rating indicator.	Performance Review	Review Section
Manager's Comments	Comments provided by the manager when closing the review.	Performance Review	Final Comment
Manager's Comments	Comments provided by the manager in regards to the review meeting.	Performance Review	Review Meeting
Manager's Rating	Rating given by the manager when evaluating the goal, competency or custom item of an employee. The manager's rating can only be seen in an employee performance review.	Performance Review	Review Section
Meeting Date	Date of the meeting between the manager and the employee to discuss the review.	Performance Review	Review Meeting
Not Applicable	Checkbox that allows the rater, if the related permission is granted in the configuration, to mark an item as not applicable. Not applicable items will not be weighted nor be part of the section or overall rating calculation.	Performance Review	Review Section
Organization	Organization the employee works for.	Performance Review	General Information - Employee Information
Overall Rating	Overall rating calculated by the system for the entire review, based on the ratings for all sections. This field displays on the summary section of the review. The display of the associated detailed ratings can be toggled on or off with Hide/Show Detailed Rating.	Performance Review	Review Section
Overall Rating	Field that shows the overall rating for the review. The display of this field and the format of the rating is dependent on the review configuration settings.	Performance Review	Summary
Overview	Heading of the section that presents an overview of the current performance review, such as the information on the employee and on the review in display.	Performance Review	Overview
Progress	Progression percentage of the goal. This field applies to goals only.	Performance Review	Review Section
Release	Optional workflow step done by the manager and/or the employee that allows the user to decide when to expose the review to	Performance Review	Workflow Status Bar

Field	Description	Applicable to	Header
	the other party, thus sending the review to the next configured step. Depending on the review request configuration, this step might not be part of the process definition or be set to execute automatically, therefore not showing.		
Review Meeting	Review section that always shows when a meeting between the manager and the employee has occurred. The Review Meeting section displays in the left panel menu.	Performance Review	Review Meeting
Review Status	Status of the review as it goes through the review workflow process. The display of the statuses depends on the review request configuration. Possible review statuses are: <ul style="list-style-type: none"> <li>• Draft - the review has been created and notifications have been sent informing</li> <li>• To be approved</li> <li>• Under approval - the review has been submitted by the employee and is awaiting a decision.</li> <li>• Approved</li> <li>• Released</li> <li>• Acknowledgment requested - a request has been sent to the employee and they must acknowledge that they agree with the details of the review.</li> <li>• Acknowledged</li> <li>• Closed</li> <li>• Under Calibration</li> <li>• Calibrated</li> <li>• Revised</li> </ul>	Performance Review	General Information -Current Review
Section Overall Rating	Overall rating calculated by the system for the related section. This field displays on the summary of each section. The display of the section's detailed ratings can be toggled on or off with Hide/Show Detailed Rating.	Performance Review	Review Section
Section Summary	Heading of the summary of each review section.	Performance Review	Review Section
Start Date	Date the goal starts to be evaluated. This field applies to goals only.	Performance Review	Review Section

Field	Description	Applicable to	Header
Status	<p>Progression status of the goal. This field applies to goals only. Possible statuses are:</p> <ul style="list-style-type: none"> <li>• In progress - the achievement of the goal is in progression.</li> <li>• Not Started - the achievement of the goal has not started.</li> <li>• Completed - the goal has been achieved.</li> <li>• Canceled - the goal has been canceled.</li> </ul>	Performance Review	Review Section
Summary	Heading of the summary of the entire performance review.	Performance Review	Review Section
Summary	Review section that shows a summary of the review. The display of this summary section is dependent on the review configuration. When displayed, the Summary section shows on the left panel menu.	Performance Review	Summary
Target Rating	Field that indicates the rating expected to be attain for the given competency in the context of the employee's job position.	Performance Review	Review Section
Update Employee Profile	Optional workflow step done by the manager only that consists of updating the employee's talent profile with the review's information. Depending on the review request configuration, this step might not be part of the process definition, therefore not showing.	Performance Review	Workflow Status Bar
Write Review	Mandatory workflow step done by the manager and/or the employee that consist of completing the review by entering the appropriate ratings and comments. This step must be completed by at least the manager. Whether the employee also completes a self-assessment is determined by the review request configuration.	Performance Review	Workflow Status Bar

# 5 Succession Planning

## Getting Started with Succession Planning

### Succession Plan

Succession Planning is the process that an organization goes through to identify a roster of the best persons who will be able to assume a key position in the organization when the person currently in the position moves to a different one, or leaves the organization. Succession Planning is not limited to executive or managerial positions, it can be used to identify the most suitable persons for any position deemed critical to the organization's success. It can also be designed to identify people who have high potential generally, or who are top performers.

#### Succession Plan Basics

A succession plan is generally created, tracked and updated by an HR Administrator, the manager of the person whose position is the subject of the plan, or by the incumbent themselves. If you have Manager permissions you can view and manage the succession plan for any of your direct and indirect reports. If you are the position manager of a succession plan, including your own, you can view and manage those plans as well. If you have HR Administrator permissions, you can also view and manage the succession plan of all the employees in your organization (including your own).

A succession plan is associated with a position profile, not the person currently in the position (the incumbent). In the event that the person leaves the position (is promoted, transferred, fired, etc.) the succession plan remains associated with the position profile.

An organization has three different options for deciding who they want to include in succession plans: internal employees, external candidates or both. To provide the greatest range of quality successors an organization should look to use both employees and external candidates. Available external candidates are those that applied for a job via Recruiting and subsequently had their details added to the system. Along with including external candidates in a standard succession plan, they can also be associated with a requisition that is created as part of a succession plan.

Once created, a succession plan cannot be deleted. If all successors are deleted from a plan, the plan remains active, even when empty. The empty plan continues to be associated with the position profile.

If the incumbent moves to another position or leaves the organization, and you have the necessary permissions, you can create a requisition directly from a succession plan. Before you can create a requisition, you must typically request your manager to approve the succession plan before you can create a requisition and populate it with the potential successors in the successor plan.



**Note:** In order for the incumbent to view their own Succession Plan, it requires the incumbent to be the direct manager of the job position, therefore, the approver for the Succession Plan should not be the "direct manager of the position" to avoid the incumbent having the ability to approve their own Succession Plan. Care should be taken to avoid this scenario.

#### Adding Persons to a Succession Plan

Generally there are three ways to add persons to a succession plan:

1. Perform searches from the Succession Plan page and add persons from the search results.
2. Select persons from a Talent Pool and add them to a plan.
3. Select persons from a Nomination Slate and add them to a plan.

### Succession Plan Page Layout

Managers access their succession plans from the Navigation bar, Succession link. The page layout includes the following features (as shown in the figure below):

1. Breadcrumbs showing the Job Position of the succession plan, and the name of the employee who is the subject of the succession plan.
2. Approval status section.
3. Actions toolbar.
4. Views toolbar (List, Timeline, Matrix)
5. Successors, History and Plan Information (if UDF's are used) tabs/views.
6. Requisition information section.
7. Ranked successors list.
8. Unranked successors list.

The screenshot displays the Succession Plan page for Jonathan Coleman (Sr. Director, Planning & Process). The page includes a Performance Card on the left, a Job Position header, a Status section (Approved), a Note, a toolbar with 'More Actions', and tabs for 'Successors' and 'History'. Below these are sections for 'Current Requisition For This Job Position' and two tables: 'Ranked Successors' and 'Unranked Successors'.

Rank	Type	Successor Name	Match Sta...	Readiness	Comment
1		Michael Decker	None	Readiness not specified	-
2		Julia Savard	None	Ready in under a year	-
3		Michele Campbell	None	Ready in under a year	-
4		Darrell Evans	None	Readiness not specified	-
5		Darlene Henderson	None	Ready in 1-2 years	-
6		Henry Stevenson	None	Readiness not specified	-
7		Randall Walker	None	Ready in under a year	-
8		Rene Washington	None	Readiness not specified	-

Rank	Type	Successor Name	Match Sta...	Readiness	Comment
		Debra Powell	None	Ready in under a year	-
		Keisha Cooper	None	Ready in 1-2 years	-
		Gabriel Wright	None	Readiness not specified	-
		Marc Gagne	None	Readiness not specified	-
		Maria Sanders	None	Ready in 1-2 years	-

### Succession Plan User-Defined Fields

Administrators have the ability to add Succession Plan User-Defined Fields (UDF's) to the default Succession Plan template allowing for a new tab and UDF's on the Succession Plan page.

The ability to add UDF's to the Succession Plan allows customers to better track information that is most relevant to them, a position's expiration date or the last reviewed date, for example. The UDF's also improve a customer's ability to track information across plans to aid in facilitating workflow and approvals.

A new tab, *Plan Information* has been added to the Succession Plan to accommodate the UDF's. When working with Succession Plan UDF's, keep in mind the following:

- When adding a UDF to the Succession Plan template, if *Editable* is selected, the field will be editable in the Plan Information"tab, else the field will be read-only.
- When adding a UDF to the Succession Plan template, if *Requires Approval* is selected, changing that UDF's information will re-trigger the Succession Plan approval process.
- UDF's are at the Succession Plan level; they do not get added to the successors on the plan itself.

For information on how to enable Succession Plan UDF's, refer to the Oracle Taleo Enterprise Edition Administration Guide for Performance.

## Search

The Succession Plan feature of Performance offers a number of search tools you can use to perform searches for potential successors for a position.

Available tools to search for employees in your organization who might fit as potential successors in a succession plan include: a basic search by employee name, advanced search, and search with Talent Pools and Nomination Slates. The employee profile, initially created from a candidate's resume and then updated as the employee is assessed and rated, provides the basis for searching for potential successors. When searching for successors you must search for employees and candidates separately.

### Basic Search by Employee

Search amongst your direct employees and within your network.

### Advanced Search

Advanced Search combines search criteria for candidates, employee metrics, keywords, and user-defined fields to determine which employees are retrieved in a search.

### Talent Pools

A search amongst members of talent pools.

### Nomination Slates

A search amongst members of a nomination slate.

## Viewing a Succession Plan

If you have Manager permissions you can view and manage the succession plan for any of your direct reports and indirect reports, but not your own. If you have HR Administrator permissions or are the direct manager of the job position, you can also view and manage the succession plan of all the employees in your organization (including your own).

You must have direct reports to be able to view their succession plans. The exception is if you have HR Administrator permissions or if you are the Job Position Manager, which enable you to view and manage the succession plan of all employees in your organization. If you are the Job Position Manager of your current role, you are also able to manage your own plan.

### Performance > [Navigation bar] > Succession

1. Click Succession Plan. The succession plan of one of your direct reports is displayed. The person's name is displayed in the breadcrumbs at the top of the page.
2. You can perform one of the following steps:
  - o Review the succession plan for the person displayed.
  - o If you want to view the succession plan of a different direct report, click the dropdown arrow next to the name that is currently displayed near the top of the page. From the list that appears, click the name of a different direct report.
  - o If you want to view the succession plan of an indirect report, click the dropdown arrow next to the name that is currently displayed near the top of the page. Then click Other. In the People Selector window, search for employees in your network or by a general keyword search.

The succession plan of the direct report or indirect report you selected is displayed. Employee successors are identified with a blue icon and candidate successors with a green icon. You can perform a variety of operations to manage this person's succession plan.

## Succession Matrix

The performance matrix enables an organization to better visualize and analyze employees, whether as potential successors in a succession plan or in a talent pool, by presenting employees on a cell matrix using two data points (X and Y axis values).

The most common values used for analysis are the Performance and Potential dimensions, which are the axes set by default. When a matrix is configured and subsequently used, the employees who have been added to the succession plan or talent pool and have data for each of the dimensions (axis values) will fall into a matrix cell. As for those who do not have a data value for one or more of the dimensions that are plotted, they will be placed in the Unrated Successors list.

The user has the ability to move employees around from one cell to another. This override functionality is very powerful as the dimension values may not tell the true story. For example, the manager of a succession plan may decide that the original cell placement for an employee overemphasizes his candidacy as a successor. Therefore, he might choose to move that potential successor to a cell of lesser importance/value. Both the original and overridden cell placement are stored in the database.

Typically when an employee is moved from one quadrant to the next in a matrix, it updates metrics for that specific plan or talent pool, however, these changes can be reflected in the employee's talent profile metrics. When you edit a performance matrix, action buttons are provided for updating the metrics for all successors in a matrix or you can select to update individuals.

When an employee has been moved in a matrix, an arrow in the successor's icon indicates their metrics have been overridden. Now you can choose to update employee metrics and commit the change to their person record. When an update has been committed, you cannot automatically return the employee to their original cell, as you could when their metrics had only been changed for that succession plan.

It is important to note that updating employee metrics from a succession plan does not involve succession plan approval workflow. Metrics can be updated regardless of the state of the plan.

A color palette is available to customize a cell's background color in the configuration module. Also cell distribution details can be displayed, showing the percentage breakdown of the total number of matrix members in each cell.

To provide quick and thorough analysis, multiple matrices can be created and associated to the same succession plan template, allowing the manager to easily move from one matrix to another

A performance matrix can contain a maximum of 5 columns (X axis) and 5 rows (Y axis), for a total of 25 cells.

Each matrix can present 2 dimensions, one for each axis, and each axis can correspond to any of the 8 available dimension types:

- Review Rating
- Potential - this metric is customizable. You select the value you want for each division during configuration and do not set thresholds.
- Risk of Loss - this metric is customizable. You select the value you want for each division during configuration and do not set thresholds.
- Promotability Readiness - this metric is customizable. You select the value you want for each division during configuration and do not set thresholds.
- Years in Management
- Years in Industry
- Competency Rating
- Goal Rating

Furthermore, each cell in the matrix can display key metrics on any rated or unrated successor on the succession plan. The succession matrix can be configured to show or hide any or all of the available employee metrics:

- Average Goal % Complete
- Bench Strength
- Career Plan Indicator
- Fit Analysis
- Competency Rating
- Goal Rating
- Performance Review Rating
- Risk of Loss
- Succession Plan Count

## Succession Plan History

History is available for actions that occur within a succession plan.

When viewing events in the **History** tab, you can display all of them or only those that occurred since the last approval. While the current approval status is always displayed on the plan, approval details — which includes the approver, the date, and any comments — are available from the **History** tab.

History records are added for the following:

History events*	
Create plan	Change to approval status
Add successors to Unranked Successors list	Change successor readiness
Remove successor from plan	Move successor between Ranked Successors and Unranked Successors list
Set successor as interim replacement	Rank successor
Create requisition	Remove requisition
Set interim replacement in Time Line mode	Restore to original cell in Matrix mode

\* Unless indicated otherwise, the events occur in List mode.

### History Tracking of Comments

The history of comment entries for Succession Plan updates is tracked, including the following event details:

- creation date
- successor the comment is about
- its creator

Everything but the comment itself is summarized in the Date/Time Event, Event, Details and By columns of the History view. The user can access comment history under the Succession Plan's History tab. If the information in the cells of the grid is truncated due to length, you can click on the history event to open the History Detail dialog for that event.

The following table lists messages for history tracking of succession plan Events and Details.

Event	Details	Examples
Readiness has been changed for a successor.	The readiness for "{0}" has been changed from "{1}" to "{2}".	<ul style="list-style-type: none"> <li>• The readiness for "Julia Savard" has been changed from "3 months" to "7 months".</li> <li>• The readiness for "Julia Savard" has been changed from "3 to 5 months" to "7 months".</li> <li>• The readiness for "Julia Savard" has been changed from "not specified" to "7 months".</li> <li>• The readiness for "Julia Savard" has been changed from "3 months" to "not specified".</li> <li>• The readiness for "Julia Savard" has been changed from "3 to 5 months" to "4 to 7 months".</li> </ul>
A comment has been added about a successor.	A comment has been added about "{0}".	<ul style="list-style-type: none"> <li>• A comment has been added about "Rene Washington".</li> </ul>
Ranking has been changed for a successor.	The ranking for "{0}" has been changed from "{1}" to "{2}".	<ul style="list-style-type: none"> <li>• The ranking for "Jonathan Coleman" has been changed from "1" to "3".</li> <li>• The ranking for "Jonathan Coleman" has been changed from "1" to "unranked".</li> </ul>

Event	Details	Examples
		<ul style="list-style-type: none"> <li>The ranking for "Jonathan Coleman" has been changed from "unranked" to "3".</li> </ul>
Interim flag has been added for a successor.	"{0}" has been flagged as interim replacement.	<ul style="list-style-type: none"> <li>"Julia Savard" has been flagged as interim replacement.</li> </ul>
Interim flag has been removed for a successor.	"{0}" has been removed as interim replacement.	<ul style="list-style-type: none"> <li>"Julia Savard" has been removed as interim replacement.</li> </ul>

## Succession Plan Comment Support

Comment Support in Succession Planning provides administrators and managers the ability to add comments or notes while conducting transactions in the module. Comments provide justification and context about Succession Planning activities, so when users return to the transactions at a later date, they have a historical record of why decisions were made and what discussion took place. Most actions performed to add an employee to a succession plan allow users to enter comments.

Characteristics of comments in Succession Planning include the following:

- Ability to edit and delete comments.
- Spell check embedded in comments.
- Comments can contain 6,000 characters.
- Ability to add a general comment about an entire Succession group in List, Timeline or Matrix mode.
- If the Add Comment dialog is left blank then no comment instance is created or tracked.
- Ability to filter recent comments.
- By default, comments are available for viewing by authorized users having access to a succession plan.
- When comments are entered and saved an audit trail is created containing the comment's creator and the creation date.

### Adding Successors to a Succession Plan

When adding a successor to a succession plan using *Add successors to the plan > Add People*, an Add Comment pop-up displays that includes the name of the Succession Plan and accommodates up to 6,000 characters.

### Adding Successors from People Search

To streamline the workflow, two steps have been combined into one when adding successors to a succession plan using *Add successors to the plan > Advanced Search > People Search*. When selecting a person from a list of successors on the People Search dialog, users will confirm the addition of the successor(s) to the succession plan in the same step and within the same new window that a comment can also be added. Comments are not mandatory, so if a comment is not desired, leave the comment area blank and select *Yes* to add the successor to the Succession Plan without a comment.

### Removing Successors from a Succession Plan

Users are given the option to add a comment when removing a successor from a Succession Plan. When users select *Remove the selected successor from the plan* a confirmation pop-up window displays with the option of adding a comment.

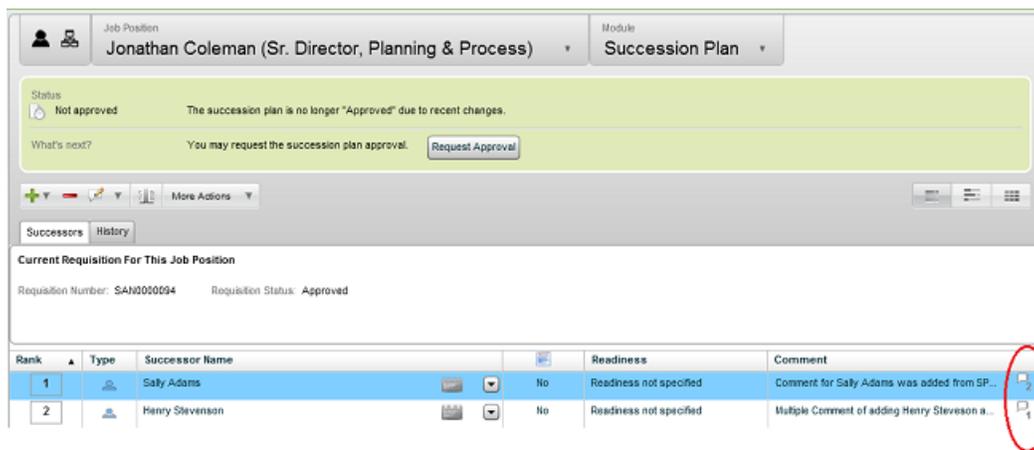
In the event that a user removes a successor from a Succession Plan, all the comments entered for this successor are kept in the memory. In the future, should this successor be added back into the Succession Plan again, all the comments entered previously will be restored.

### Editing a Successor

Users are given the option to add a comment when editing a successor's readiness. When users select *Edit Successor* they are presented with the option of entering a comment to document this decision.

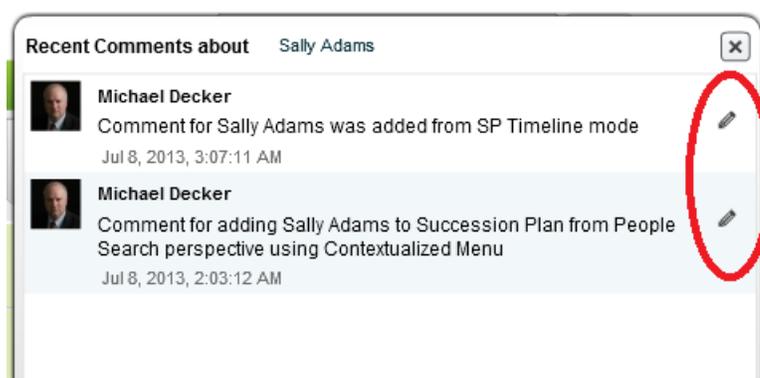
### View Recent Comments Pop-up and Editing and Deleting Comments

In the Comment column on the Succession Plan, there's an actionable indicator that displays the number of comments associated to each successor.



an actionable indicator that displays the number of comments associated to each successor.

Once *View recent comments* is clicked, a pop-up displays with all the comments for that successor. Scrolling is enabled if there are many comments. If there are more than 10 comments, the *View More Comments* link displays. Once this link is clicked, scrolling is enabled and users are able to view all of the comments by scrolling. Clicking the pencil icon brings up the options to edit or delete any or all of the existing comments. Notice that possible misspellings are underlined in red.

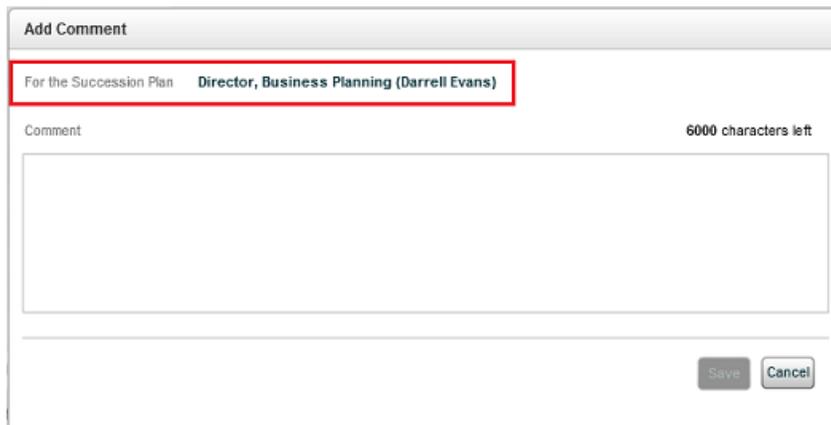


 **Note:** Users are only able to edit or delete the comments that they own/authored. The pencil icon only displays next to those comments that are editable by the logged in user.

## Adding General Comments

Users can add a comment regarding a Succession Plan as a whole. When *Add Comment* is selected from the toolbox, the Comment pop-up displays. This toolbox option is available in the List, Timeline and Matrix modes of the Succession Plan.

Notice that the comment states that it is "For the Succession Plan."



## Recent Comments Filter

When viewing comments, it's possible to filter them to customize your view. If the logged in user is the author/owner of the comments, they are editable in this filter view as well.

# Working with Succession Plans

## Creating a Succession Plan

Creating a succession plan consists in identifying potential successors for a position and adding them to a plan in order to quickly find a replacement when a position needs to be filled. A succession plan is created only once and remains active even if it contains no successor(s).

To be authorized to create a succession plan, you must be the manager of the job position, as per defined in SmartOrg, under Job Positions.

### Performance > [Navigation bar] > Succession

1. You have these options:
  - o If a plan or plans exist for one or more of your direct reports the system will display one of them. You can choose to work with that employee's succession plan, or use the breadcrumbs to select another direct report whose plan you want to work with.
  - o If a succession plan has never been created for an employee's position, a message appears indicating there is no plan for the position, and asking if you want to create one. If so, click Create. The Create button only appears the first time the plan is created. When first created the Succession Plan is entirely empty.

2. Click the Add Successors to the Plan button to begin adding successors from your direct reports list, or from searches. These successors go to the unranked successors list.  
As you add successor to the plan you can add comments documenting your decisions.
3. Rank the top group of unranked potential successors to move them into the ranked successors list.
4. Once the plan is created and successors are added and ranked as desired, save the plan.
5. If plan approval is desired, click the More Actions button and select the Request Approval option.  
The approval request goes to the line manager of the person who is the subject of the plan.

A succession plan is created for the desired position, and plan approval requested.

## Performing a Keyword Search for Successors

The Succession Plan feature offers a number of search tools you can use to identify potential successors for a position. The employee profile, initially created from a candidate's resume and then updated as the employee is assessed and rated, provides the basis for searching for successors.

### Performance > [Navigation bar] Succession Plan

1. If needed, use the Job Position button in the breadcrumbs to open the desired employee's succession plan.
2. Click the Add Successors to the Plan button, and select Add People from the list of options.
3. You have choices in the People Selector to search by employees, or by keyword search.
  - o Select Search in My Employees to find potential successors by drilling down through your direct and indirect reports and delegated employees.
  - o Select Search by Keywords to search either employees or candidates for potential successors. Keyword search checks username, first name, middle initial, last name, and email address fields.
  - o Select Extended Search to enable fields in the employee's talent profile and additional fields associated with candidates to be searched.
4. Select the check box(es) for the people in the Search Results list you want to include in the succession plan, and click the Right Arrow icon to place them in the **Selection** list.  
Selecting **Include Direct Reports** will automatically add the selected employees' direct reports.  
For each person you select, or each group of persons you select, you will be prompted to add comments documenting your decision. When a comment applies to more than one person the names of the people selected will display in the comment dialog.
5. Click **Select** to add those in the **Selection** list to the **Unranked Successors** list of plan.

You can drag and drop unranked successors into the ranked list.

You can also select up to four successors and click the Compare icon to compare their metrics.

## Performing an Advanced Search for Successors

The Succession Plan feature offers a number of search tools you can use to identify potential successors for a position. The employee's talent profile, initially created from a candidate's resume and then updated as the employee is assessed and rated, provides the basis for searching for successors. Follow the steps in this section if you want to specify any of a large number of criteria (other than a person's name) in your search. Note in step 5 of this task, when the Add to Current Succession Plan option is selected, the Add Comment dialog is displayed next so you can document your decisions.

### Performance > [Navigation bar] Succession

1. Select the required employee to display their plan.

2. Click the Plus icon and select **Open Advanced Search**.  
Selecting **Add Person** displays the People Selector.
3. Select the criteria you want to use to filter your results and click **Search**.
4. To add a single person from the Employee column, click the Right Arrow icon to display the Go To menu and select **Add to current succession plan**.
5. To add people, select the checkboxes for each person you want to add and click **Actions**, the Down Arrow icon and select **Add to current succession plan**.  
If one of the people selected is already a plan member, the Add to current succession plan option is not available.

The people are added to the succession plan as unranked successors. You can return to the plan by clicking the Up Arrow icon.

## Ranking and Unranking a Successor

When you have a number of successors in a succession plan, you typically want to rank the employees who are best suited to the position and you might have other employees you want to include in a succession plan but do not want to rank for the moment. You can also change an employee's ranking relative to other ranked employees and an unranked employee's position relative to other unranked employees. As well, you can rank an unranked potential successor or vice versa.

The following steps assume that successors are currently in the succession plan.

### Performance > [Navigation bar] Succession

1. The succession plan of one of your direct reports is displayed. The person's name is displayed in the breadcrumbs at the top of the page.
2. While the succession plan is displayed you can perform any of the following tasks.
  - o In the ranked successors or unranked successors section, Successor Name column, you can click the drop-down arrow that corresponds to a successor you want to rank, or whose rank you want to change, and then click Set Rank. A dialog allows you to specify the new rank and click OK. The successor is displayed in the ranked successors section in the correct position.
  - o In the ranked successors section, Successor Name column, you can click the drop-down arrow that corresponds to a ranked successor you want to move to the unranked successors section, and then click Unrank.
  - o You can also drag and drop a successor from one section to the other.
3. After making your changes, click Save.
4. After you rank or unrank a person, you can use the same dropdown list to select Add a Comment, and document your decision.
5. If you continue to make ranking changes, always click Save afterward to save your changes.

The employees you selected are now displayed in the ranked/unranked successors section of the succession plan and the changes are reflected in the succession matrix.

When you are satisfied with a succession plan, you can request your manager to approve the plan.

## Comparing Successors

You can perform a comparison of potential successors in the ranked or unranked views of the succession plan. You cannot compare an employee successor with a candidate successor.

You have potential successors and want to compare some of them to determine which of them you should rank higher or lower in the succession plan. The successors you are going to compare must be on the same view.

### Performance > [Navigation bar] Succession

1. Press and hold the CTRL key on your keyboard and click the name of up to four people in the ranked or unranked successor views you want to compare.
2. Click the Compare icon.

Information about all the candidates you selected is displayed in a manner that facilitates comparisons.

When you have identified candidates who you feel would make good successors, you can manage their ranking as appropriate.

## Managing a Successor's Readiness

Managing a successor's readiness consists in specifying the readiness of potential successors for a job position, in the event that the person currently in the position moved to a different position or left the organization.

Open the succession plan for which you want to manage the successor's readiness.

### Performance > [Navigation bar] Succession

1. Make sure you are viewing the plan in a list mode.  
If this is not the case, click the List Mode icon.
2. In the Successors view, locate the successor whose readiness you want to edit.
3. To specify the readiness, click the corresponding Down Arrow icon in the Successor Name column and select the Edit Successor option.
4. In the Successor Readiness window, specify the appropriate time needed for the employee to be ready to hold that position, starting today.
5. Click OK.

You can also edit the readiness of successors when viewing the succession plan in the timeline mode, accessible by clicking the Timeline Mode icon. In this mode, the readiness is changed by dragging the readiness box border of the desired successor. The system will display the time period as you drag the icon border.

6. When you edit a successor's readiness rating, you can also add a comment to document your decision as well as denote whether this employee is the interim replacement and their rank.

## Selecting a Potential Interim Replacement

A single candidate can be identified as a potential interim replacement in a succession plan. This is an individual who could serve as a temporary replacement in the event that the incumbent leaves the position.

Open the succession plan for which you want to manage the potential interim replacement.

### Performance > [Navigation bar] Succession

1. Locate the name of the person you want to select as a potential temporary replacement in the ranked or unranked successors list and, in the Successor Name column.
2. Click the corresponding drop-down arrow and then select Edit Successor. Select Yes from the Interim Replacement dropdown.
3. You may want to enter a comment documenting your decision.

In the Interim Replacement column, "Yes" is displayed.

## Requesting Approval of a Succession Plan

The Succession plan status must be *Not Approved*.

### Performance > [Navigation bar] Succession

1. Click **Request Approval** and a confirmation message is displayed.
2. Click **OK** and the status is updated to *Approval in Progress*.  
You cannot add new successors or change the rankings of existing successors when an approval is in progress, but you can move successors in the matrix of the succession plan.

In the approver's My Tasks panel, the Approve Succession Plan task is displayed.

When the plan is approved, and you want to create a requisition and have the required permissions, you can create a requisition directly from the succession plan and source the requisition automatically with the potential successors in the successor plan.

If the approver rejects the succession plan, you can edit it and send a new approval request to the approver.

Whether your request is approved or rejected, you receive an email message informing you of your approver's decision.

Once a succession plan has been approved or rejected, you can also modify it afterward and request approval of the revised succession plan.

## Approving a Succession Plan

- Another user has requested your approval of a succession plan.
  - **Performance > [Employee Center] My Tasks**
  - **Performance > [Navigation bar] Succession**
1. Locate the succession plan you want to approve in Performance or via email, using one of these methods:
    - Filter **My Tasks** by selecting **Approve Succession Plan**, choose one of the tasks, and then select **Succession Plan** from the Summary Information panel.
    - Open the approval email and click the link for the succession plan. If you are in a single sign-on (SSO) environment you will go directly to the plan, otherwise you will need to login to Performance before being directed to the succession plan.
    - In Succession Planning open the plan you want to approve. An approval section displays at the top of the page.

2. Evaluate the succession plan and decide whether you want to approve it. You cannot edit the plan. You can only approve or reject it.
3. Click **Approve** or **Reject** and enter any comments to document your decision.
4. Click **OK**.

*Approval In Progress* is replaced by *Approved* if you approved the plan or by *Rejected* if you rejected the plan. The date of the decision is included and the comments are displayed if you hover over the Thought Bubble icon.

An email message is sent to the manager informing them of your decision. If the manager has the required permissions, they can create a requisition directly from the succession plan.

Whether you approve or reject the succession plan, the manager who originally sent the request can edit the plan and send you a new approval request.

## Creating a Requisition

Once you have received approval for a succession plan, you can create a requisition directly from the succession plan provided you have the required permissions. This action is typically necessary when the incumbent moves to another position, leaves the organization or is fired. When you create a requisition directly from a succession plan, the potential successors are sourced automatically.

- You can only create a requisition directly from a succession plan if you have the required permissions.
- Before you can initiate a requisition, however, the succession plan must be approved by your manager.

### Performance > [Navigation bar] Succession

1. If your succession has been approved, “Approved” is displayed next to Actions. You can only create a requisition after the succession plan has been approved.
2. Click More Actions and then click Create Requisition or click Create Requisition directly from the toolbar. If no template has been associated with the job template, the system will display an error message.
3. In the Match Successors dialog box, select which users you want to have matched to the new requisition and click OK.

The requisition is created and the chosen successors in the succession plan are automatically matched with the requisition.

## Talent Pools for Succession Plans

Employees can be added directly to specific succession plans from talent pools

From a succession plan you can choose to search from within a talent pool, enabling you to immediately add pool members to that plan.



**Note:** If you select **Modify Search** when searching within a talent pool, it reverts to a regular person search and no longer searches solely within that talent pool.

## Configuration

None; however, *Manage* Succession Plans and Talent Pools user type permissions are required.

## To Search a Talent Pool for Successors

- You must have Manage user type permissions for Succession Plans and Talent Pools.
- Talent pools relevant to the succession plan must be configured.

### Performance > [Navigation bar] Succession

1. Open the Succession Plan you want to work with.
2. Click the Plus icon and select **Search within Talent Pools**.
3. Select the desired talent pool and click **Select**.  
The Search Results page is displayed, listing the members of the talent pool.  
If you select **Modify Search** and change the criteria, the search changes to a regular advanced search and the association with the pool ends.
4. Do one of the following to add persons from the talent pool to the succession plan.
  - Click the Right Arrow icon for a person to add and select **Add to current succession plan**.
  - Select the checkboxes for multiple people and from the **Actions** menu select **Add to current succession plan**.
5. As you add persons to the succession plan you can enter comments to document your decisions.

The employees are added to the succession plan as unranked successors.

You can select additional employees and choose other options such as adding to a different succession plan or a requisition; however, you can only add individual employees to a nomination slate.

## Working with Succession Plan Matrixes

### Viewing a Succession Plan as a Matrix

Viewing a succession plan as a matrix allows managers to view the potential successors in the plan in the form of a succession matrix and to move the successors as they want.

You must have direct reports to be able to view succession plans. The exception is if you have HR Administrator permissions, which enable you to view and manage the succession plan of all employees in your organization.

If your system configuration enables candidates to be included in a succession plan, they are identified with a green icon, while employees are identified with a blue icon.

1. Open the succession plan of the desired employee.
2. If needed, add successors to the plan, either as ranked or unranked successors.
3. Click the grid icon to open the default matrix associated to the succession plan.

Initially, the matrix only shows the rated successors. It is also possible to view the details of an employee's metrics by clicking the down arrow icon and selecting Show Details. In the cell, beside the down arrow icon, there is always one metric shown, which corresponds to the metric set to be displayed in the cell, as per the configuration of the succession plan matrix.

4. Click the down arrow icon in the matrix list, to the left of the Print button, to change the matrix that is displayed for the succession plan if available.

Once the succession plan matrix is displayed, you can move the successors as you want.

## Moving a Successor in the Succession Matrix

Moving a successor in the succession matrix allows a manager to override the default ranking of a potential successor in any cell of the available matrices, providing a precise succession planning procedure as well as a year-round analysis tool.

To be able to move successors around in a matrix, employees must first be added to the succession plan, as ranked or unranked successors.

1. Open the succession plan of the desired employee.
2. Click the Grid icon to open the default matrix associated to the succession plan.
3. Select one successor and move them to another cell by either dragging and dropping or by clicking on the Down Arrow icon, select the Move to cell option and then specify the destination cell in the Cell Selector window, which also indicates the corresponding dimensions.

If there are many successors in a matrix cell you can use the pager arrow or the show all employees option to find the required successors.

If needed, you can restore a successor to its original cell position in the matrix, that is to his position as in the succession plan, before you made changes.

## Restoring a Successor to Its Original Cell in the Matrix

Restoring a successor to its original cell in the matrix allows a manager to restore a selected rated successor to the position he had in the matrix before any changes were made.

If your system allows employee metrics to be updated from a succession matrix and this has been done for a successor, that successor cannot be returned to their original cell using this procedure.

1. Open the succession plan of the desired employee.
2. Click the Grid icon to open the default matrix associated to the succession plan.
3. Locate the successor for which you want to restore the original position, click the down arrow icon and select Restore to original cell.

When a successor is rated, he is moved back to his original cell. However, if the successor in the matrix was not rated, he will be moved back to the list of Unrated Successors.

## Updating Employee Metrics from a Succession Matrix

An employee's metrics can be updated directly from a succession plan matrix, replacing their existing talent profile metrics with those from the succession matrix.

- Refer to **Customizable Metrics** in the **Performance Management Configuration Guide** for information about migrating your system to customized employee metrics and their use in matrices and charts.
  - The successor who is being updated must be an employee, as candidates do not have metrics that can be updated.
1. Open the succession plan for the required job position.
  2. Click the Grid icon to open the default matrix associated to the succession plan.
  3. Select an employee, indicated by a blue icon, and drag them to a different cell.  
The employee icon is updated to include an arrow indicating that the employee's metrics have been overridden for this succession plan.
  4. Click the down arrow icon beside the employee, select Update Metrics and click OK in the confirmation dialog box.

You can select Update Metrics from the main menu to update multiple employees at once.

The arrow is removed from the icon as the employee metrics have now been updated and the employee can no longer be restored to their original cell.

## Moving an Unrated Successor

Unrated successors are those that did not have values for the metrics used to create the matrix, when they were initially added to it.

There must be unranked successors associated with the succession plan.

1. Open the succession plan of the required employee.
2. From the More Actions menu, select Show Unrated Successors.
3. From the Unrated Successors list, do one of the following:
  - a. Drag and drop the successor into a cell in the matrix.
  - b. Beside the successor, click the down arrow icon and select Move to cell. In the Cell Selector window, click on one of the cells and click OK.

This successor is added to the cell and displayed with an arrow icon to indicate this is not the person's original place in the matrix.

## Printing a Succession Plan Matrix

Printing a succession plan matrix allows to generate a PDF version of the succession plan, as per the configuration of the printed metrics.

1. Open the desired succession plan.
2. Click the Grid icon to open the default matrix associated to the succession plan.

3. Click the Print button to display the print preview.
4. When the succession plan matrix is opened as a PDF file, from the File menu, select Print.

The succession plan matrix will be printed as per the defined configuration of the printed metrics.

## Succession Nominations

This feature makes it easier for people to collaborate on succession plans; through a straight forward process for nominating persons to a nomination slate, validating them, and adding persons from the nomination slate to a plan.

While you need to have access to a succession plan to work with it, you do not need to have access to the plan to nominate someone. Once someone is nominated they are added to the nomination slate for that position. Plan owners can then review the nominees and decide to add them to the plan or reject them. People can be nominated from search results, talent pools, the talent browser and the talent profile. History is kept, recording when a nomination slate is created and when people are added, deleted, or have had their status change.

Taleo Connect Client (TCC) can be used to export a nomination slate. Also a TCC import can be used to reset nomination slates by deleting them.

## Configuration

Configuration > [Performance] Settings	
Name	Description
Enable Succession Nominations	If enabled, system users can nominate people for succession plans, when they also have the <i>Allow nominations</i> user type permission associated with their account. The setting also enables the nomination slate. By default this setting is disabled.

View and manage user type permissions for succession plans are required for any users that want to work with plans and add people from the nomination slate to the plan.

Configuration > [SmartOrg] Administration > [Users] User Types > Performance > Succession Plans	
Name	Description
Allow nominations	Users require this permission for the <b>Nominate for a position...</b> and <b>Nominate for this position</b> options to be available.

## Nominating Successors

Multiple members of your organization can be involved in the nomination process. Any employee can nominate someone within their part of the company for a position, without requiring access to the succession plan. Subsequently the succession plan owner can review those nominees and add suitable ones to the plan.

- *Nominating people for a position*

- *Reviewing nominees*
- *Adding nominees to a plan*

## Nominating People for a Position

Nominating someone for a position can take place from that person's talent profile, search results, the talent browser, and the members list of a talent pool.

You can choose to nominate any employee you have access to and choose from any succession plan for an active position in your system. Once you have nominated someone, they are added to the nomination slate for the succession plan of that position. You can also nominate people in context. When searching within a succession plan or a talent pool associated with a position, you can directly add someone to that specific nomination slate.



**Note:** You can add yourself to a succession plan's nomination slate.

### To Nominate People

The configuration setting **Enable Succession Nominations** must be enabled.

The nominator must have the **Allow nominations** user type permission.

The job position must be active.

**Performance > Employee Search > Search Results**

**Performance > Navigation bar > More dropdown > Talent Pools**

**Performance > Navigation bar > Profile**

1. From Search Results or from the Members list of a talent pool, click the Right Arrow icon and select **Nominate for a position...**

OR

From a Performance Card in the Talent Browser, click the Down Arrow icon and select **Nominate for a position...**

OR

From the Talent Profile select **Nominate for a position...**

2. Enter criteria — this can include partial words — which builds an AND relationship search query. This means each term must be present to return a search result.

**Keyword** - This searches the position name, position code, and the description.

**Position Title** - The name of the position associated with the succession plan.

**Manager Name** - The name of the manager for the job position, which may not be the incumbent's manager.

**Incumbent Name** - The name of the person currently in the position.

3. Click **Search**.

You must click **Reset** before you enter different criteria and search again.

4. Select the position and the job description is displayed and you can select a readiness option and add a comment.

The readiness value selected here is not carried through to the succession plan if the person is added to the plan from the nomination slate.

5. Click **Nominate**.

The person is added to the Nomination Slate for the chosen position.

## To Nominate People in Context

The configuration setting **Enable Succession Nominations** must be enabled.

The nominator must have the **Allow nominations** user type permission.

The talent pool context must include a position.

**Performance > [Navigation bar] > Succession > Search Results**

**Performance > [Navigation bar] > More dropdown > Talent Pools**

1. From Search Results or from the members list of a talent pool, click the Right Arrow icon for a specific person and select **Nominate for this position**.

The job description, qualifications, and responsibilities are displayed.

2. Select a readiness option and add a comment.

The readiness value selected here is not carried through to the succession plan if the person is added to the plan from the nomination slate.

3. Click **Nominate**.

The person is added to the Nomination Slate for the position related to this succession plan or talent pool.

## Reviewing Nominees

This gives the owner of the succession plan the opportunity to view the details of nominees and decide whether they should be accepted or rejected as potential successors.

The Nomination Slate displays the nominees for the succession plan and provides the opportunity to filter the list to those who match the criteria for the position. Subsequently setting a nominee's status from *New*, to *Pending additional information*, to *Under consideration*, to *Approved*, or *Rejected*, helps indicate their suitability. It also provides a quick glance overview of the quality of those nominated as successors.

## To Review Nominees

You must be the owner of the succession plan.

**Performance > [Navigation bar] Succession**

1. Select **More Actions > Go to Nomination Slate**.
2. Select the filters to narrow the nominees to meet your criteria and click the Refresh icon.
3. Click the Right Arrow icon to display the **Actions** menu and select a module to see more details on the nominee.

Use your browser's back button to return to the Nomination Slate.

4. Change the **Status** to indicate the person's suitability as a successor.

If the same person has been nominated multiple times, changing their status for one instance will update the entire list.

Promising successors can be added to the plan.

## Adding Nominees to a Plan

After reviewing nominees you can add them to the succession plan.

Added nominees are removed from the **Nomination Slate**; however, if someone subsequently nominates them again they will be added to the slate again.

### To Add Nominees

You must be the owner of the succession plan.

#### Performance > [Navigation bar] Succession

1. Select **More Actions > Go to Nomination Slate**.
2. Beside a nominee's name, click the Right Arrow icon to display the **Actions** menu and select **Move to succession plan**.  
OR  
Select the checkboxes beside multiple nominees and select **More Actions > Move to succession plan** to add more than one nominee at a time.
3. As you add persons to the succession you are prompted to enter comments to document your decision.  
When an employee is added to a succession plan from the Nomination Slate, existing comments entered while performing the nomination are moved to the succession plan.

The selected nominees are removed from the nomination slate and added to the plan's **Unranked Successors** list.

## Nomination Slate History

This provides a record of events for the nomination slate and the nominees included in it.

You select **Go to Nomination Slate** from the succession plan to access the history. The events that are recorded in the history include:

- Nomination slate creation
- Adding a nominee to the slate
- Removing a nominee from the slate
- Additional nominations of a nominee
- Nomination status change

# HR Administrators Working with Succession Plans

## Viewing a Succession Plan

Viewing a succession plan allows an HR administrator to access a succession plan that is pending, whether the approval has not yet been requested or the approval is in progress or rejected.

#### HR Administration Tools > Succession Plan

1. Filter the approval requests in order to view the desired succession plan.

2. In the result grid, click the name of the corresponding employee.

The Succession Plan page displays and shows the successors for the job position held by the selected employee.

# 6 Career Management

## Getting Started with Career Management

### Career Planning

The Career Planning feature of Performance allows an employee and/or the manager to lay out a series of career scenarios in the employee's career plan. The scenarios are independent of one another so there can be overlaps in the jobs contained in each scenario.

Career planning is based on job roles rather than positions, which enables you to build more generic career scenarios. For example, there might be a Regional VP of Sales job role and three positions -- one for an eastern region, one for a central region and one for a western region. When outlining your career scenarios, or the career scenarios of your employees if you are a manager, you would indicate the person's interest in the job role of Regional VP of Sales rather than in one of the individual positions.

Additionally, there are no requirements that force a particular job progression or sequence. For example, a person may be in an Vice President of Support role, but has a desire to move to Sales. The Career Planning feature allows to account for “demotions” as well as lateral moves. The Vice President of Sales can add a job role of Sales Manager followed by Vice President of Sales.

The Career Planning feature is available in Performance when the Career Planning Enabled setting in Performance Administration is set to Yes. The setting is located at:

- **Performance Administration > Settings > Career Planning**

The Career Planning feature is also dependent on the Job Roles configuration.

### Career Plan

A career plan is one or a series of career scenarios (or paths) that an employee might be interested in pursuing in the organization. Each scenario is composed of a series of steps and each step is associated with a job role. A step (and the corresponding job role) can be unique to a scenario or can be used in multiple scenarios.

A career plan is composed of one or multiple scenarios and each scenario is composed of one or multiple steps. The number of scenarios possible in a career plan as well as the number of steps (and corresponding job roles) allowed in each scenario are determined in Performance Administration.

- **Performance Administration > Settings > Career Planning > Maximum Number of Scenarios**
- **Performance Administration > Settings > Career Planning > Maximum Number of Career Steps**

Employees can create their own career plan or managers can perform this task on behalf of their direct reports. Any action taken on a career plan is applied automatically and requires no approval either from the employee or the

manager. For example, an employee could create a career plan for himself/herself and the plan could be modified afterward by the person's manager without obtaining the employee's consent.

## Career Scenario

A career scenario is a series of steps for career advancement. A career scenario and its steps are defined by the employee himself/herself or by the employee's manager. A career scenario can be “vertical”, for example, manager > director > vice president, or “lateral”, if the employee seeks to gain broader experience, for example, business analyst > solution consultant > consulting director.

The number of scenarios possible in a career plan, as well as the number of steps (and consequently, job roles) allowed in each scenario, are both determined in Performance Administration.

- **Performance Administration > Settings > Career Planning > Maximum Number of Scenarios**
- **Performance Administration > Settings > Career Planning > Maximum Number of Career Steps**

Furthermore, although a specific job role can only be included once in the same scenario, it can be included in any number of other scenarios.

## Career Step

A career step corresponds to a specific job role in a career scenario. Though a particular job role can only be used once in a scenario, it can be used in any other scenario, at the same step or at a different step.

The number of steps (and consequently, job roles), allowed in each scenario is determined in Performance Administration.

- **Performance Administration > Settings > Career Planning > Maximum Number of Career Steps**

Furthermore, although any one job role can only be included once within the same scenario, it can be included in any other scenario.

As stated earlier, though a particular job role can only be used once in a scenario, it can be used in any other scenario. For example, you could have multiple scenarios with identical steps and associated job roles with the exception of the last step whose job role would be different for each scenario.

## Job Role Search

The job role search capability offered in Career Planning allows you to search job profiles to find job roles that represent career moves that might interest you.

You can perform three different types of searches.

- **Keyword Search** - Used when you want to search for a specific text string. Keyword Search will search all the following sections for the string.
  - Name of job profile

- o Description of job profile
- o Name of certification
- o Name of competency

The following keyword search options can be selected.

- o Search for exact match of a string with the use of quotation marks.
- o Search for partial strings of text with the use of wildcard characters.
- o Search for multiple words without the use of the AND boolean operator.
- o Search for any of a list of words with the use of the OR boolean operator (the operator needs to be in upper case).
- **Advanced Search** - Used when you want to perform complex searches for job roles that include, either as a requirement or an asset, a specific job level, job field or competency. If the criterion is optional, you can specify the relative weight of the criterion, from 1 to 5.
- **Best Fit Search** - Used to perform a search for job roles that best correspond to the competencies of the employee's current job.

## Fit Analysis

The Fit Analysis tool available in a career plan allows you to see the list of competencies that are part of a particular job role and the gap between an employee's current rating and the recommended rating for the job role.

The Fit Analysis can be performed for any job role card related to a specific job role or for the current job. The Fit Analysis tool panel displays up to three different sections: Strengths, Improvements and Unknown Areas.

- Strengths - This section lists the competencies where the employee has been rated higher than the recommended rating for the job. The competency must be a requirement for the job for it to appear in the strengths.
- Improvements - This section lists the competencies where the employee has been rated lower than the recommended rating for the job.
- Unknown Areas - This section lists the competencies that are required for the job but for which the employee has not been evaluated.

For each of these sections, the recommended rating as well as the employee's current rating (if available) are displayed graphically. If no competencies match the criteria of the section, the section is not displayed. By default, three competencies are displayed per section, but a **More** link is provided to display all available competencies in each section.

### Fit Analysis Display Configuration

A configuration setting in the Administration pages allows the Fit Analysis to be turned off or on in the Career Plan and Snapshot cards. Some customers do not use a competency model and find the Fit Analysis irrelevant. Or, at times even customers that do use competencies prefer not to display the Fit Analysis as it can be distracting and possibly misleading during career planning activities.

#### ***Fit Analysis Display - On***

Selecting a job card highlights the card and opens the Tools panel if it is closed. When the Fit Analysis is enabled, the competencies related to the selected Job Role display along with the employee competency ratings categorized by strengths and improvements.

The screenshot displays the Oracle Taleo Career Plan interface for Jonathan Coleman. The top navigation bar shows the employee name and the 'Career Plan' module. Below this, there are tabs for 'Current Job', 'Step 1', 'Step 2', and 'Step 3'. The main area shows three scenarios:

- My Scenario 1:** A sequence of job cards: 'Sr. Director, Planning & Process' (highlighted with a red box), 'Director, Workforce Planning' (Fit: 25%), 'Procurement Manager' (Fit: 100%), and 'VP, Operations' (Fit: 36%).
- My Scenario 2:** A sequence of job cards: 'Sr. Director, Planning & Process' (Job Level: Director), 'Corporate Training Manager' (Fit: 100%), and 'Sr. Director, Account/Billing Support' (Fit: 60%).
- My Scenario 3:** A sequence of job cards: 'Sr. Director, Planning & Process' (Job Level: Director), 'Senior Vice President' (Fit: 36%), and 'Executive Vice President' (Fit: 36%).

Annotations in the image include:

- 'Selected Job Role card is highlighted' pointing to the first card in My Scenario 1.
- 'Selected Job Role Name' pointing to the job role name in the Fit Analysis panel.
- 'Asterisk indicates mandatory competency' pointing to the asterisk on the 'Leadership' competency in the Improvements section.
- 'Competency Description Bubble' pointing to the bubble icon next to the 'Leadership' competency.

The right-hand panel, titled 'Fit Analysis', shows the selected job role 'Sr. Director, Planning & Process'. It includes a checkbox to 'Switch to another job card to view its fit analysis'. The 'Strengths' section lists 'Plan and control budget and expenditures' and 'Problem-solving Alias'. The 'Improvements' section lists 'Leadership'. A legend at the bottom indicates that a green triangle represents a 'Recommended Rating' and a yellow figure represents an 'Actual Rating'. A 'Feedback' button is located at the bottom of the panel.

The Snapshot Card display mimics that of the Career Plan depending on whether the Fit Analysis is enabled or disabled.

**Jonathan Coleman**  
Sr. Director, Planning & Proc...  
Canadian Operations  
Canada

877.394.5644 X 7856  
jcoleman@invalidemal...  
View Org Chart

**Career Plan**

My Scenario

Sr. Director, Planning & Process (Fit: 80%) → Director, Workforce Planning (Fit: 25%) → Procurement Manager (Fit: 100%)

**Fit Analysis for Sr. Director, Planning & Process**

Competency	Category	Scale	Rating
Plan and control budget and expenditures *	Strength	1-5	3
Problem-solving Alias *	Strength	1-5	3
Leadership *	Improvement	1-5	2

### **Fit Analysis Display - Off**

Selecting a job card highlights the card and opens the Tools panel if it is closed. When the Fit Analysis is disabled, the competencies related to the selected Job Role display in alphabetical order without the employee competency ratings.

The screenshot displays the Oracle Taleo Career Plan interface for Jonathan Coleman. The interface is organized into three horizontal sections, each representing a different career scenario. Each scenario starts with the 'Current Job' role and progresses through 'Step 1', 'Step 2', and 'Step 3'. The 'Current Job' role is 'Sr. Director, Planning & Process' with a 'Director' job level. The scenarios are:

- My Scenario 1:** Sr. Director, Planning & Process (Director) → Director, Workforce Planning (Development: 0) → Procurement Manager (Development: 0) → VP, Operations (Development: 0) → Add a career step.
- My Scenario 2:** Sr. Director, Planning & Process (Director) → Corporate Training Manager (Development: 0) → Sr. Director, Account/Billing Support (Development: 0) → Add a career step.
- My Scenario 3:** Sr. Director, Planning & Process (Director) → Senior Vice President (Development: 0) → Executive Vice President (Development: 0).

A 'Snapshot Card' is overlaid on the interface, showing the employee's profile for Jonathan Coleman (Sr. Director, Planning & Proc..., Canadian Operations, Canada). Below the profile, it displays the 'Career Plan' and 'My Scenario' sections. The 'Snapshot Card' also lists 'Competencies for Sr. Director, Planning & Process':

- Leadership\*
- Plan and control budget and expenditures\*
- Problem-solving Alias\*

Red annotations on the right side of the screenshot indicate: '-Competencies listed without ratings' and '-Analysis legend missing'. A 'Feedback' button is visible at the bottom right of the interface.

## Competencies

A competency which is not already on an employee's Talent Profile can be added to the Talent Profile directly from the Career Plan.

Proper user permissions must be in place. This encourages career planning by providing the ability to add competencies required for future job roles or personal development.

## Performing a Keyword Search for Job Roles

Performing a keyword search for job roles allows to search for entire words or word stems in job profiles, more precisely in the name or description of job roles or in the name of competencies or requirements included in job profiles.

1. Open the career plan (your career plan or the career plan of a direct report if you are a manager).
2. When the Career Plan window is displayed, select **Add a career step** to bring up the search .
3. In the Job Role Search section, enter the text string you want to search for in the *Job Role* or *Job Field* fields.

You can enter any of the following types of information, depending on what you are searching for:

- Text string - Enter an entire word or just a part of a word to search for all occurrences of that word or word stem. For example, if you entered “manage” (without the parentheses), the result list would include all occurrences of “manage” including words such as “manage”, “management”, “manager”, “manages”, etc.
- Exact match - Enter the exact string in quotation marks that you are looking for. Example: You would enter “sales manager” including the parentheses to search for job roles that included that specific string.
- Multiple words and/or word stems - Enter a combination of words, separated by a space, to search for job roles that contain **all** the words. For example, you would enter “manage direct” without the parentheses to search for all job roles that contained both words that begin with “manage” and words that begin with “direct”.
- One string or another - Enter multiple words separated by the boolean operator OR to search for job roles that contain **any** of the words. The operator OR must be entered in uppercase. For example, enter “manager OR director OR sales” (without the parentheses) to search for all job roles that include at least one of the words. The search results might contain job roles that more than one of the words.

4. Click Search.

The system searches for the text string in the following sections of job profiles:

- Name
- Description
- Competency Name
- Requirement Name

The job roles that correspond to the search criteria are displayed in the Job Role Search Results window.

## Performing an Advanced Search for Job Roles

Performing an advanced search for job roles allows users to search for job roles based on a specific job field or job level or competencies, which can be requirements or assets for the job role.

1. Open your career plan or the career plan of a direct report if you are a manager.
2. When the Career Plan window is displayed, click **Add a career step** to bring up the search.
3. In the Search for a Job Role section, click Advanced Search.
4. In the Advanced Search window, click the check box next to a criterion you want to include in the search.

For the Job Field and Job Level criteria, you must also select a value.

Use scroll bar to move up or down in the window as necessary.

5. Indicate whether the criterion is mandatory or optional by selecting the corresponding option.
  - o If the criterion is optional, you can specify the relative weight of the criterion, from 1 to 5.
6. Perform steps 4 and 5 for each criterion you want to include in the search.
7. Click Search.

The job roles that correspond to the search criteria are displayed in the Job Role Search Results window. The Fit column indicates the match percentage of the job role in relation to the search criteria.

## Performing a Search for the Best Fit Job Roles

Performing a search for the best fit job roles allows to quickly search for job roles that include competencies that are the same or similar to those of the employee's current job.

1. Open your career plan or the career plan of a direct report if you are a manager.
2. When the Career Plan window is displayed, click **Add a career step** to bring up the search.
3. In the Search for a Job Role section, click **Best Fit**.

The Job Role Search Results window displays all the job roles that best correspond to the current job.

## Performing a Gap Analysis

Performing a fit analysis is useful to see how well an employee fits with a particular job role included in a career scenario by showing the gap between the recommended rating for a competency included in a job role and the employee's rating.

The Fit Analysis panel must be configured to display.

1. Open your career plan, or the career plan of a direct report if you are a manager.
2. In the Career Plan window, click the Tools icon to expand the Tools panel.
3. In the Career Plan window, click the job role card for which you want to view a competency fit analysis.
4. The competencies of the job role are automatically displayed in the Fit Analysis panel, under any one of three possible categories - Strengths, Improvements or Unknown Area. The rating of an employee for a particular competency compared to the recommended rating specified in the job role determines the category in which the competency is displayed.

If the More link is displayed, you can click it to view additional competencies and to scroll through the information.

5. To see the fit analysis of another job role included in a scenario, click the corresponding job role card. The fit analysis information changes automatically.
6. To close the Fit Analysis panel when you are done, click **Hide the supporting tools**.

## Viewing a Career Plan

Viewing a career plan allows to see all your career scenarios or, if you are a manager, those of a direct report.

Prior to viewing a career plan, the Career Planning Enabled setting must be set to Yes in Performance Administration and a career plan must already exist.

1. Perform one of the following steps.

- To view your own career plan , click **[Navigation bar] > Career**
  - If you are a manager and you want to view one of your direct report's career plan, click **[Navigation bar] > Career**
2. If you are a manager and you want to view a direct report's career plan, select the employee's name in the employee list. You can also view the career plan of a different employee by selecting the name of the direct report in the employee list.

The Career Plan window displays your career scenarios or those of the employee you selected.

You can add a new scenario or edit or delete an existing one.

## Working with Career Plans

### Creating a Career Plan

Creating a career plan involves creating career scenarios that include a series of job roles. Each scenario corresponds to a career path that the employee could potentially pursue within the organization. A career plan is created for an employee by the employee himself or by the employee's manager. A career plan is created only once and remains active even if it contains no scenario.

1. If a career plan has never been created, a message appears asking whether you want to create a career plan. Click Create. Note that the Create button only appears the first time a plan is created.  
The first scenario is created automatically and is named My Scenario by default. If you do not want to use the name My Scenario delete this first scenario before adding job roles to it because scenario names cannot be changed afterward.
2. If the career plan already exists (your own or the career plan of a direct report if you are a manager), open it.
  - To open your own career plan, click **[Navigation bar] > Career**
  - To open the career plan of one of your direct reports, click **[Navigation bar] > Career**
3. Create a scenario. See *Creating a Scenario*.
4. Add job roles to the scenario, either by performing a job role search or a fit analysis, or by dragging any job roles included in another scenario to the scenario you are working on. See *Adding a Job Role to a Scenario*.

The career plan can contain the maximum number of scenarios allowed or no scenario at all. Even when empty, a career plan cannot be deleted.

### Creating a Scenario

Creating a scenario allows users to add a sequence of job roles that together form a career plan. You can create scenarios for yourself or for any of your direct reports, if you are a manager.

You can create a scenario if you have not exceeded the maximum number of scenarios allowed in a career plan. The number is set in Performance Administration > Settings and the setting is *Maximum Number of Scenarios* .

1. Open your career plan or the career plan of the direct report if you are a manager.
2. In the Career Plan window, click **Start New Scenario** .
3. In the New Scenario window, enter the name of the scenario you want to create.

Because scenarios are sorted alphabetically and the name of a scenario cannot be edited once created, you might consider naming your scenarios such that they are listed in a particular way.

4. Click OK.

In the new scenario section displayed in the Career Plan window, the job card of the employee's current job is automatically inserted.

5. You now need to add job roles to the career plan scenario, either by performing a job role search or a fit analysis, or by dragging job roles included in scenario to the scenario you just created.

## Adding a Job Role to a Scenario

Adding a job role to a scenario is used when creating or editing a scenario, either by performing a job role search or a fit analysis, or by dragging job roles included in a scenario to the current scenario.

A job role can be added to a scenario at any time as long as the maximum number of steps has not been reached. The *Maximum Number of Career Steps* setting is defined in **Performance Administration > Settings**.

1. Open your career plan or the career plan of a direct report if you are a manager.
2. Select one of the following actions.
  - o *Adding a Job Role from an Existing Scenario* - This is the only job role addition task that can be performed directly in the Career Plan window. There are 2 possibilities - when you drag a job card from a scenario that is displayed to a location in the current scenario, the job role is copied and will therefore be in both scenarios; if you press the shift key at the same time as you drag a job card, the job role will be moved to the current scenario instead of being copied.
  - o *Adding a Job Role from a Job Role Search* - This method offers various search criteria you can use to search for job roles that you can then add to a scenario.

## Adding a Job Role from an Existing Scenario

You can add a job role to a scenario by dragging the job role from one scenario and dropping it on the first scenario. This method is typically used to quickly create multiple scenarios that all have the same sequence of job roles with the exception of the last step.

1. Open your career plan, or the career plan of the direct report if you are a manager.
2. In the scenario that contains the job role you want to add, click the card of the job role and drag it to the desired location in the destination scenario.

When the enclosed Plus icon appears, you can drop the scenario.

If an enclosed X icon appears instead, continue to drag the card until you find an acceptable location and the enclosed Plus icon appears. You can then drop the scenario.

## Adding a Job Role from a Job Role Search

Adding a job role from a job role search is the most common method to add job roles to a career plan scenario.

1. Open your career plan, or the career of a direct report if you are a manager.
2. In the Career Plan window, select **Add a career step**.

3. Use one of the following search types:

**Keyword Search** - Enter the name or partial name of the job role, along with words from the job role profile (Description, Qualifications, Responsibilities).

**Advanced Search** - This enables additional job role fields to be included, such as Job Level, Job Field, and competencies.

**Best Fit** - This displays job roles that correspond the best to the competencies that are part of the employee's current job role.

The Job Role Search Results window displays all the job roles that correspond to the search criteria you specified. For each job role found, the list also displays the corresponding job field, job level, status (whether the job role is already used in a scenario or not) and the fit percentage compared to the current job's competencies. On the result page, you can also view the job profile of any listed job role by clicking on the name of the Job Profile.

4. In the Job Role Search Results list, locate the job role you want to add, click on the name to highlight it, and then select **Add Step**.

You might want to reorder the job roles in the Career Plan window, which provides a better view of a scenario and its job roles.

## Viewing Feedback on a Career Plan

Viewing feedback on a career plan, either yours or the career plan of a direct report, is used when you want to view someone else's opinion and rating on an entire scenario or on specific job roles with regard to you or the direct report.

You can only view feedback when it has been provided for the job role that corresponds to the card selected in the career plan.

1. Open your career plan or the career plan of the direct report if you are a manager.
2. In the Career Plan window, click the Tools icon to expand the Tools panel.
3. Click **Feedback** to open the corresponding panel.
4. In the Career Plan window, click the job role card for which you want to view feedback that might have been provided.

Note that if no feedback has been provided, you might want to request feedback by clicking **Ask For Feedback**.

5. If there is feedback, it is displayed in the Feedback panel along with the name and job title of the person who provided the feedback, the date of the feedback, the rating given (if any), and comments (if any).
  - o To view the entire content of the feedback, double-click the feedback text in the Feedback panel.
6. To close the Feedback panel, click **Hide the supporting tools**.

## Reordering Job Roles

Reordering job roles is frequently performed after you have run a job role search and dragged job roles from the result list to the Career Plan.

1. Open your career plan, or the career plan of the direct report if you are a manager.

2. In the Career Plan window, click a job role card you want to move to a different position and drag it to the desired step, dropping it between two cards or directly on top of one. The enclosed X icon indicates that the current position is invalid.

If a job role card is dragged from one scenario to another, the card is copied to the second scenario and the job role card is part of both scenarios.

## Removing a Job Role from a Scenario

Removing a job role from a scenario deletes it from the scenario. You or your manager can perform this action.

1. Open your career plan, or the career plan of the direct report if you are a manager.
2. In the Career Plan window, locate the scenario that contains the job role you want to delete.
3. On the job role card, click the down arrow icon to open the option menu and then select **Delete this step**.
4. Confirm the deletion by clicking **Yes**.

The job role is deleted from the scenario. It is not deleted from other scenarios that include it.

## Deleting a Scenario

Deleting a scenario removes an entire sequence of job roles from a career plan.

1. Open your career plan, or the career plan of the direct report if you are a manager.
2. In the Career Plan window, click the down arrow icon next to the scenario name that you want to delete and select **Delete this scenario**.
3. When a confirmation request appears, click **Yes**.

The deleted scenario is no longer displayed in the Career Plan window.

## Career Plan Fields and Buttons

Fields and buttons related to career plans in Performance are presented in the following table. Each entry in the table includes a field or button, a description, possible values (when they are predefined), the part of the application to which the field applies and the field's section header.

Field	Description	Applicable to	Header
Actual Rating	Actual rating of the employee for any competency of the selected job role, if the competency has ever been evaluated as part of an employee review. If the employee's actual rating is higher than the recommended rating, it will be shown under Strengths, and if lower, it will be under Improvements. If the competency has never been evaluated for the employee, it will be shown under Unknown Areas.	Career Plans	Fit Analysis

Field	Description	Applicable to	Header
Advanced Search	Search option that enables you to specify a series of criteria when you are searching for job roles.	Career Plans	Job Role Search
Best Fit	Search option that allows to find job roles that best correspond to the competencies of the employee's current job.	Career Plans	Job Role Search
Current Job	In the Career Plan window, this column of the plan automatically displays the employee's current job, in every scenario.	Career Plans	Career Plan
Feedback	Tool used to request feedback on a career plan scenario and/or on specific career steps of a scenario.	Career Plans	Toolbox
Field	Field on which the search will be performed. To make a selection, you only need to check all desired fields. For Job Level and Job Field fields, you also need to select the applicable value.	Career Plans	Advanced Search
Fit	Percentage that indicates how the job role fits the search criteria specified.	Career Plans	Job Role Search Results
Fit	Gap between the employee's ratings - as viewed in the Fit Analysis - and the expected ratings for the job role. 100% means there is no gap. For instance in the Fit Analysis there may be 10 items and the employee meets or exceeds 7 of those items. Their fit percentage would be 70%.	Career Plans	Job Card
Fit Analysis	Tool used to obtain an analysis of the difference between the recommended rating for each competency in the job role and the rating the employee has obtained for each competency (where applicable).	Career Plans	Toolbox
Job Field	Job field associated with the job role, as per the job role definition in SmartOrg.	Career Plans	Job Role Search Results
Job Level	Job level associated with the job role, as per the job role definition in SmartOrg.	Career Plans	Job Role Search Results Job Card
Job Role Search	Tool used to search for job roles.	Career Plans	Toolbox
Name	Name of the job role, as per its definition in SmartOrg.	Career Plans	Job Role Search Results
Options menu	You can use the Options menu to view the job profile that	Career Plans	Status Job Card

Field	Description	Applicable to	Header
	corresponds to the job role or to add the job role to an existing scenario. From a job role card included in a scenario, you can use the Options menu to view the corresponding job profile or to delete the job card from the scenario.		
Recommended Rating	Recommended rating required for any competency of the selected job role.	Career Plans	Gap Analysis
Search Type	When a field is to be included in the advanced search and the corresponding box is checked, the search type options become active. There are two options: <ul style="list-style-type: none"> <li>• Mandatory - The selected field MUST be present for a job role to be returned in the search results.</li> <li>• Optional - The selected field is optional and will be searched according to the specified weight.</li> </ul>	Career Plans	Advanced Search
Step	In the Career plan window, the Step column displays any job role that has been added to the scenario. The number of steps that can be added to a scenario is dependent of the corresponding setting, Maximum Number of Career Steps, defined in Performance Administration.	Career Plans	Career Plan
View Job Role Profile	Actions menu option, available from the job role card or the Job Role Search Results page, that opens the profile of the related job role, with a complete description and all associated competencies and certifications.	Career Plans	Options menu
Weight	When a field is selected as a search criteria and optional, you have the possibility of specifying the relative weight from 1 to 5.	Career Plans	Advanced Search

# 7 Development Planning

## Getting Started with Development Planning

### Development Planning

Development Planning complements the Career Management functionality. It offers the ability for employees to create and manage development plans both from a central location as well as in-context throughout Performance. The development plan enables employees to manage development goals and determine the specific development activities needed to achieve those objectives, whether it be to improve in a current role or to help attain a future role.

Development planning enables employees to not only explore future potential career paths, but to view, monitor, and progress through the development activities necessary to attain them. These activities can be to focus on suggested or desired areas of general improvement or in support of specific goals that the employee will be undertaking as part of their goal plan.

Both employees and managers can define development activities, either from the development plan itself or through the employee's talent profile, performance review, goal plan and/or career plan.

The development plan lists all activities, regardless of the context where it was added or created. However, when within a specific context, a mini development plan is available to users. This mini plan shows the due date of the activity as well as the status and progress information on top of all the other development activities linked to the selected item.

In addition, collaboration tools are integrated to facilitate social learning. Employees have the possibility to share development activities with others, benefit from a mentoring relationship, and rate and review development content such as courses, books, and coaches.

### Configuration

Aside from the setting that provides the possibility to enable the Development Planning feature, various other settings are available to configure the feature and all related functions.

All settings are found under **Configuration > [Taleo Performance] Settings**. There are three categories of settings related to development planning. Each category offers numerous settings but there is always one setting required to basically enable the feature.

## Working with the Development Plan

### Development Plan

The development plan is the fundamental part of the Development Planning functionality and the central location where employees can manage all their development activities.

The development plan is the main location from which each employee can add and remove development activities, edit activity details, maintain the progress status of activities, rate and comment activities, share or recommend activities with others.

Each employee in the system can have a development plan, which is also accessible by the employee's manager, with the same rights as those granted to the employee, as well as to HR administrators with the corresponding permissions.

The development plan can include different types of activities: formal activities such as courses, informal or experiential activities such as a job shadowing assignment, and any other custom-created activity.

The activities are added to the development plan by either searching amongst predefined activities in the development library or by creating custom activities, such as job shadowing, mentoring and networking or any other activity not in the development library. Those custom activities that have been created by employees can be shared with other colleagues and will display in their view of the development library.

All actions related to the activities in the development plan are tracked and shown in the History tab.

The development plan is not time-bound and can extend into the future. Therefore, as an example, a development plan can have one development activity that spans three months and another that spans three years. Since the development plan will grow over time, employees will only want to focus on the active items they are working on. Any completed activities can be moved to an archived view of the plan.

## Development Plan Approval

The approval of a development plan is an optional process by which the activities composing the development plan are presented to defined users for them to review the development plan activities and to determine if the plan is appropriate. Approval can be done for the entire plan and also when a change occurs in the plan.

The approval of a development plan is determined by the definition of an approval workflow set at the development plan template level. By default, as there is no approval workflow defined, a development plan does not require approval.

However, when the development plan template has an approval workflow, the development plan needs to be approved, based on the approvers selected in the approval workflow and according to their order in the workflow. In addition, email notifications can be sent to the participants at each step of the approval, as per the email templates selected.

The approval process can occur in two different situations, each affected by different settings.

- When the approval of the development plan is requested by the creator of the plan: When the development plan template has an approval workflow that includes at least one approver, the plan must be approved by the specified approver.
- When a change is done to an activity in the plan and that change has been configured to require approval if modified: In the development plan template, the user-defined fields and the standard fields that indicate that the field requires approval will need to go through the defined approval workflow if the said field is edited.

## Printable Development Plan

The development planning feature provides the ability to print development plans.

The printable development plan presents the following sections and fields:

- **Development Plan Information** - General information about the development plan. This section is always part of the printed plan. However, if any of the fields don't have a value, they will display *Not Specified*.

Printed development plan		Development Plan page Section - Field
Section right under Development Plan header	Status	The status of the plan shows in tool bar, next to the action icons.
	Approval Date	The approval date shows only when the plan has been approved.
	Print Date	No correspondence on development plan; just the current system date.

- **Employee Information** - This section shows general information about the employee. This section is always part of the printed plan. However, if any of the fields don't have a value, they will display *Not Specified*.

Printed Development Plan		Source
Employee Information	Field	The information in this section comes from the employee's user account information
	Employee	Employee's First Name and Last Name
	User Name	User Name
	ID	Employee ID
	Title	Job Role Title or User Title (depending on selected option)
	Manager	Employee Manager
	Organization	Organization

- **Current and Archived Development Activities** - These sections list all current and archived activities, by alphabetical order, when the development plan has at least one current or archived activity. When there are none, this section is not printed at all.

Printed Development Plan		Source Field
<b>Current/Archived Development Activities</b>	<b>Field</b>	<b>Development Activity page Section - Field</b>
<p><b>Sub-section on gray background section</b> When the Current/Archived Activities section prints, this sub-section always displays. If some fields have no values, they will indicate <i>Not Specified</i>.</p>	Name of the activity	Specifications - Name
	Status of the activity (in parentheses)	Specifications - Status
	Description of the activity	Specifications - Description
	Start Date	Specifications - Start Date
	Due Date	Specifications - Due Date
<p><b>Development Activity Information</b> The information in this section initially comes from the development activity definition when it was configured. Therefore, if some information was not provided in the definition, it will not display in the development activity page, or in the printed development plan.</p> <p>When the Current/Archived Activities section prints, this sub-section always shows. If some fields have no values, they will indicate <i>Not Specified</i>.</p>	Name	Development Activity Information
	ID	Development Activity Information - ID This value is never available for custom activities.
	Category	Development Activity Information - Category
	Type	Development Activity Information - Type
	Related Competency	Development Activity Information - Competency
<p><b>Measurement</b> When the Current/Archived Activities section prints, this sub-section always displays. If some fields have no values, they will show a value of 0.</p>	Actual Value	Measurement - Actual
	Target Value	Measurement - Target
	Stretch Value	Measurement - Stretch
	Progress	Measurement - Progress
<p><b>Comments</b> When the Current/Archived Activities section prints, this sub-section only displays when there is at least one comment. If none, this sub-section is not printed.</p>	Author	Comments - Added by
	Date	Comments - Added on
	Message	Comments - text
<p><b>Linked Items</b> When the Current/Archived Activities section prints, this sub-section only displays when there is at least one linked item. If none, this sub-section is not printed.</p>	Item	Specifications - Linked Items - Item
	Context	Specifications - Linked Items - Context

Note that the printed version does not reflect the standard field display of the development plan template. The fields that are part of the printed development plan (indicated in table above) will display even if they are set not to be displayed in the development plan template. For instance, if the Stretch Value field was set to not display in the template, it will still show up in the printed development plan, with a '0' value.

## Configuration

For users to be entitled to print development plans, the following configuration is required:

- The setting **Enable Development Plan Printing** must be set to Yes. (accessed via **Configuration > [Taleo Performance] Administration > [Global Configurations] Settings** , under the Development Planning category. Note that this setting is private and disabled by default. Therefore, it can only be activated by Oracle, upon request.
- The user needs viewing access to development plans (via the permission **Performance > Development Plans > View**
- The development plan must contain at least one activity, either current or archived, for the plan to be printed.

## Viewing a Development Plan

Viewing a development plan allows the user to either view his own development plan, or another employee's development plan. The plan shows all active development activities, whether these activities are in progress, completed, not started or canceled.

**Performance > [Navigation bar] Development**

**Performance > [Navigation bar] Development**

If a development plan has never been created, start by creating a plan by clicking **Create**.

1. Click the **Activities** tab to view all the active activities in the plan.  
To view activities by context, select **View By**, which can organize the activities by competency, employee goal, job role, or review item.
2. Click the **Archived Activities** tab to view all activities archived for that specific plan.
3. Click the **History** tab to view a list of all the actions performed on the development plan.  
Double-clicking the **Date and Time** column displays the event history in a separate message box.

Once in the **Development Plan** page, you can add new activities, delete or edit activities and view the details of a specific activity in the list.

## Printing a Development Plan

- The setting **Performance > Development Planning > Enable Development Planning** is set to Yes.
  - The setting **Performance > Development Planning > Enable Development Plan Printing** is set to Yes.
  - The user must have the permission **Performance > Development Plans > View** .
  - The development plan contains at least one activity.
1. Access the development plan to print via **[Navigation bar] > Development**
  2. Once in the development plan, click the Printer icon to open the PDF version of the plan.  
Note that there are no printing options to select. The fields that are printed are predefined.
  3. To print the development plan, select the printing function of the PDF reader.

The PDF version of the development plan is printed.

## Showing/Hiding Development Plan Instructions

Instructions must have been created in at least one language.

### Performance > [Navigation bar] Development

1. Select **More Actions > Show Instructions**.

**Show Instructions** only displays in the **More Actions** menu if instructions exist and they are hidden.

If the instructions are not available in your language, they are displayed in the base language of your system.

2. Click the enclosed Green X icon to hide instructions.

Only one set of instructions is available for the entire development plan, regardless of whether you display them within a specific activity.

## Adding an Activity to a Development Plan

Adding activities to a development plan is done by searching for an existing activity or by creating a new private activity.

### Performance > [Navigation bar] Development

### Performance > [Navigation bar] Development

If a development plan has never been created, start by creating a plan by clicking **Create**.



**Note:** The same activity can only be added once in a development plan.

1. There are three different methods to select and add an activity:
  - o In the **Development Plan** page, click the plus icon and select **Search for an activity...** to search among the existing activities in the company's development library and then choose from the Activity Collections in the left pane to see individual activities. Then select **Add Activity** to add it to a development plan.
  - o In the **Development Plan** page, click the plus icon and select **Create an activity...** to create a new custom and private activity for yourself.
  - o In the **Development Plan** page, in the left pane menu, click **Recommendations** and select an activity that was recommended by a peer and then select **Accept**.
2. If you decide to add the activity to your plan, you will be given the option to link the activity to various items.
  - a. In the **Link Development Activity** window, select the desired context from the drop-down list and then select a corresponding item.
  - b. Click the plus icon to add your selection in the list of selected items.
  - c. Repeat the two previous steps for each element you wish to link to your activity.
  - d. Once all the linking elements have been selected, click OK.

The activity is added to the development plan.

## Removing an Activity from a Development Plan

Removing an activity deletes it from the development plan.

**Performance > [Navigation bar] Development**

**Performance > [Navigation bar] Development**

1. From the **Activities** tab, select the activity you wish to remove.
2. Click the right arrow icon and select **Remove From Plan**.
3. Confirm the deletion by clicking **Yes**.

The selected activity is removed from the development plan.

## Requesting for the Approval of the Development Plan

Approval of the development plan is required whenever the related development plan template includes an approval workflow, and when a change is made to the development plan that requires approval.

**Performance > [Navigation bar] Development**

**Performance > [Navigation bar] Development**

1. In the **Development Plan** page, click **Request Approval**.
2. Confirm the approval request for it to be sent to the users defined in the approval workflow of the development plan template.

The approval request will be sent to the first approver in the approval workflow and will be displayed in that user's **My Tasks** panel, under the **Approve Development Plan** task type.

When the approval request is accepted or rejected by the defined approvers, it will be indicated in the user's development plan; until then, the development plan status will show that the plan is under approval.

## Replying to an Approval Request

Whether it be to approve a goal plan, a succession plan, a development plan, a performance review or an employee change request, the approval task to be performed is always brought to the attention of the approver via My Tasks.

An approval must have been requested for the approver be able to accept or reject an approval request.

**Performance > [My Tasks]**

1. In **My Tasks**, from the **Show** list select the appropriate Approve category.
2. In the task list, select an item to display summary information and the corresponding link.
3. Click the link and you are brought either to the specific item page or to a window indicating the employee change requested.
4. Click **Approve** or **Reject**, enter a comment and click **OK**.

The approval request is answered and the task is removed from **My Tasks**.

# Searching for Development Activities

## Development Activity Search

Performing a search allows employees to find suitable activities to add to their development plan.

Searching for a development activity launches the specified query to find the relevant activities, either in the development library or in the activities shared with the employee.

Various types of searches are offered to employees to find activities:

- Keyword Search - where the string entered is searched in all activity names and descriptions.
- Advanced Search - where the search is performed based on the specified context values.
- Best Fit Activities - where the result shows activities that present the same organization, location, job field, job role, job level and competency as the employee performing the search.
- Top Rated Activities - where the result shows activities having the highest rating, presented in descending order, from 5 stars to 0.
- Activities Shared with Me - where the result shows private activities that have been shared with the current employee by others.
- Activities Shared with Employee - where the result shows private activities that have been shared with the employee whose plan is in display.

Development activities can also be searched from and added to the Talent Profile and the Career Plan.

When searching for Development Activities from the Talent Profile, the context of the competency is kept and only the Development Activities associated to that original competency are returned in the search results. This allows for more focused career development discussions and provides more context for the employee.



**Note:** This contextual search functionality does not apply to Development Activities coming from Oracle Taleo Learn.

The screenshot shows the 'Competencies' section for Jonathan Coleman. It is divided into Behavioral, Job-specific, and Language categories. The 'Leadership' competency is highlighted in blue. A context menu is open over the 'Leadership' row, with the option 'Search for a development activity...' highlighted in red.

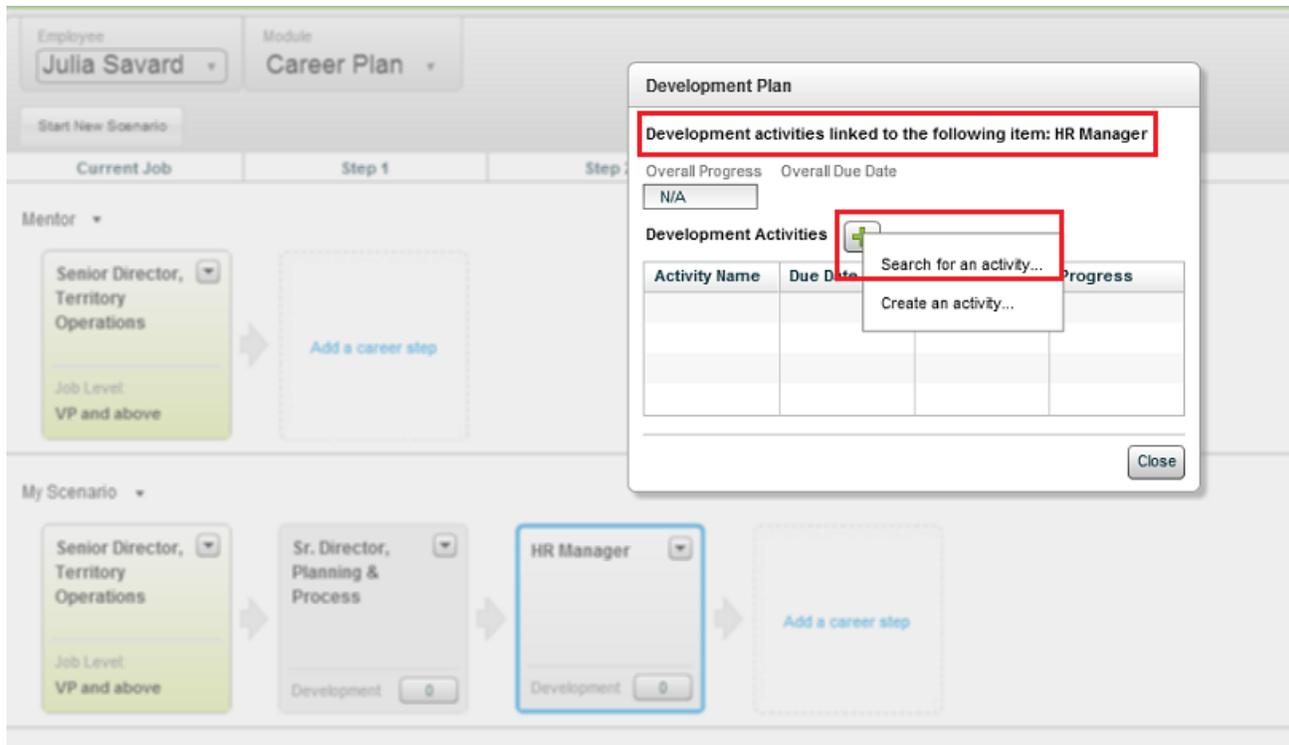
Name	Proficiency	Experience	Last Used	Interest	Manager's Ra...	Employee's R...	Development ...
Change management	Beginner				Solid Perform...	0	N/A
<b>Leadership</b>	<b>Intermediate</b>				Solid Perform...	0	N/A
Problem-solving Alias	Advanced				Solid Perform...	0	N/A

Each of the Development Activities returned in the search results shown below are associated to the Leadership competency.

The screenshot shows the 'Development Activity Search' interface. A search bar is at the top. Below it, a table lists search results for the Leadership competency. The first four results are highlighted in blue and enclosed in a red box.

Activity Name	Category	Rating	Action
Axiom: Powerful Leadership Proverbs	Document		Add Activity
Contextualized Competency - Leadership	Other		Add Activity
Courage: The Backbone of Leadership	Document		Add Activity
Courageous Leadership	Document		Add Activity

When searching for Development Activities from the Career Plan, the context of the Job Role is kept and only the Development Activities associated to that original Job Role are returned in the search results.



Each of the Development Activities returned in the search results shown below are associated to the HR Manager Job Role.



## Adding an Activity by Searching in the Development Library

When searching in the development library for an activity, activities that were created by the company and that are available to all users are searched.

**Performance > [Navigation bar] Development**

**Performance > [Navigation bar] Development**

If a development plan has never been created, start by creating a plan by clicking **Create**.

1. In the **Development Plan** page, click the plus icon and select **Search for an activity...** to search among the existing activities in the company's development library.
2. In the **Development Activity Search** panel, perform your search using the keyword search, the advanced search or from the Activity Collections.

The activities corresponding to your search criteria will display.

3. If you find an activity of interest and want to add it to your plan, click **Add Activity**.
  - o If you want to know more about the activity before adding it, click the activity name to view its details.
4. If you decide to add the activity to your plan, you will be offered the possibility to link the activity to various items.
  - a. In the **Link Development Activity** window, select the desired context from the drop-down list and then select a corresponding item.
  - b. Click the plus icon to add your selection in the list of selected items.
  - c. Repeat the two previous steps for each element you wish to link to your activity.
  - d. Once all the linking elements have been selected, click **OK**.

The activity is added to the development plan.

If you want to provide additional information about the activity or edit the existing information, select the activity to view its details and make your modifications as needed on the **Development Activity Information** page.

## Searching an Activity Using Keywords

Performing a keyword search allows the user to search either in the development library or in the activities shared with the employee for entire or partial words where the string entered is searched in all activity names and descriptions.

**Performance > [Navigation bar] Development**

**Performance > [Navigation bar] Development**

If a development plan has never been created, start by creating a plan by clicking **Create**.

1. In the **Development Plan** page, click the plus icon and select **Search for an activity...** to search among the existing activities in the company's development library.
2. In the **Development Activity Search** page, perform your search by entering text in the **Keyword** search box.

You can enter any of the following types of information, depending on what you are searching for:

- o Text string - Enter an entire word or just a part of a word to search for all occurrences of that word or word stem. For example, if you entered *manage*, the result list would include all occurrences of *manage* including words such as *manage*, *management*, *manager*, *manages*, etc.
- o Exact match - Enter the exact string that you are looking for, in quotation marks. Example: You would enter *"sales manager"* to search for elements that include that specific string.
- o Multiple words and/or word stems - Enter a combination of words, separated by a space, to search for elements that contain **all** the words. For example, you would enter *manage direct* to search for elements that contain both the words that begin with *manage* and the words that begin with *direct*.
- o One string or another - Enter multiple words separated by the boolean operator *OR* to search for results that contain **any** of the words. The operator *OR* must be entered in uppercase. For example, enter *manager OR director OR sales* to search for elements that include at least one of the words. The search results might contain elements that have more than one of the words.

3. Click **Launch the search**.

The system searches for the text string in the names and descriptions of the activities in the development library or in the activities shared with the user.

The activities corresponding to your search criteria will display.

From the result list, you can add any of the activities to the development plan.

## Searching an Activity Using Advanced Search Options

The advanced search provides the ability to search for activities based on specified context values.

**Performance > [Navigation bar] Development**

**Performance > [Navigation bar] Development**

If a development plan has never been created, start by creating a plan by clicking **Create**.

1. In the **Development Plan** page, click the plus icon and select **Search for an activity...** to search among the existing activities in the company's development library.
2. In the **Development Activity Search** page, click the **Advanced Search**.
3. In the **Advanced Search** window, check the fields to be searched.

As the window keeps the values of the previous search, it is suggested to click **Reset** to remove all criteria. You can click **Customize** to select which search criteria to use.

Depending on the type of field, two selection types are possible:

- o Selection from a drop-down list of predefined values
- o Selection in a corresponding selector window, accessed by clicking the Magnifying Glass icon

The only exception being the field **Name**, which works the same way as the keyword search.

4. If you want the search results to take into account activities for which no specific context has been defined, select **Show activities not contextualized**.

If this option is checked, along with specified values in some fields, the search results will show activities that have the specified values as well as those that have no value specified.

For example, if this option is checked and you selected New York in the **Location** field, the resulting activities will either have New York as a specified location context or have no value at all for the location context.

5. Click **Search**.

The activities corresponding to your search criteria display.

From the result list, you can add any of the found activities to the development plan.

## Searching an Activity Among Best Fit Activities

Searching an activity among best fit activities provides the ability to find activities that present the same organization, location, job field, job role, job level and competency as the employee performing the search.

**Performance > [Navigation bar] Development**

**Performance > [Navigation bar] Development**

If a development plan has never been created, start by creating a plan by clicking **Create**.

1. In the **Development Plan** page, click the plus icon and select **Search for an activity...** to search among the existing activities in the company's development library.
2. In the Activity Collections panel, click **Best Fit Activities**.

The activities that most closely match your competencies display.

From the result list, you can add any of the found activities to the development plan.

## Searching an Activity Among Top Rated Activities

Searching an activity among top rated activities provides the ability to find activities that have been rated by others and that show the highest rating, listed in descending order, from 5 stars to 0.

This search option is

**Performance > [Navigation bar] Development**

**Performance > [Navigation bar] Development**

If a development plan has never been created, start by creating a plan by clicking **Create**.

1. In the **Development Plan** page, click the plus icon and select **Search for an activity...** to search among the existing activities in the company's development library.
2. In the Activity Collections panel, click **Top Rated Activities**.

The activities corresponding to your search criteria display.

From the result list, you can add any of the found activities to the development plan.

## Searching an Activity Among Activities Shared With Me

Searching an activity among the activities shared with me allows the current user to view the custom and private activities created by other users and shared with him or her. If the current user is viewing his/her own development plan, these activities are those that are shared specifically with him or her. If the current user is manager and is viewing another user's development plan, these activities will be those that are shared with him or her, not with the person who's plan is in display.

**Performance > [Navigation bar] Development**

**Performance > [Navigation bar] Development**

If a development plan has never been created, start by creating a plan by clicking **Create**.

1. In the **Development Plan** page, click the plus icon and select **Search for an activity...** to search among the existing activities in the company's development library.
2. In the Activity Collections panel, click **Activities Shared With Me**.

The activities corresponding to your search criteria display.

From the result list, you can add any of the found activities to the development plan.

## Searching an Activity Among Activities Shared With the Employee

Searching an activity among the activities shared with the employee allows the current user to view the custom and private activities created by other users and shared with the employee whose plan is in display.

**Performance > [Navigation bar] Development**

**Performance > [Navigation bar] Development**

If a development plan has never been created, start by creating a plan by clicking **Create**.

1. In the **Development Plan** page, click the plus icon and select **Search for an activity...** to search among the existing activities in the company's development library.
2. In the Activity Collections panel, click **Activities Shared With Employee** .

The activities corresponding to your search criteria display.

From the result list, you can add any of the found activities to the development plan.

## Working with Development Activities

### Development Activity

A development activity is any activity that can contribute to improve the capability of an employee to perform in his/her current job and his/her potential to perform future roles.

Development activities can take various forms:

- activities defined by the company, which are considered to be public and made available from the development library;
- custom activities created by employees themselves, which are considered private and can only be made available to other employees if shared.

Development activities are added to an employee's development plan by the employee himself or assigned by the employee's manager, by searching amongst the predefined public activities in the development library or by creating new custom private activities.

When adding an activity to the development plan, the user can provide various information about the activity, link the activity to a specific context, such as a goal, a review item, a competency or skill or even to a job role to indicate the purpose of the activity, indicate how the progress will be measured and archive the activity.

Details about a development activity can be seen from the development plan itself as well as from the mini plan, accessible via multiple contexts in the application. The Development Activity Details page shows the name, description, status and dates of the activity, lists the items that are linked to the activity and displays measurement information and other activity information, based on the type of activity.

Since development plans are not time-bound and may contain activities that can span any duration, the employees have the possibility to archive development activities that are completed or that they do not want to have displayed in their active development plan view. Archived development activities can be accessed at any time through the Archived Development Activities view.

## Third-Party Development Activity Provider Support

Oracle Taleo Enterprise Edition increases the flexibility for customers to have a robust and comprehensive development activity library with each implementation, by adding third-party provider support.

This feature provides Oracle Taleo Enterprise Edition with the ability to partner with development plan providers and offer a wider range of development activities to Oracle Taleo Enterprise Edition customers.

When a third-party development activity library has been associated with the system, it can be enabled by Oracle Customer Support in the configuration module. Once enabled, system administrators can configure individual development activities within the library to be displayed or hidden. Administrators can create and delete custom development categories and activities for a specific system, but can only enable, disable and edit those supplied by a third-party vendor.

Employees can use their own internal development activities and those from external providers in the same system. When a user searches for an activity, a provider column is included in the activity list, enabling the user to quickly identify the source of the development activity.

### Configuration

After purchasing an external development plan library, associating it with your Performance implementation is the responsibility of Oracle. Once that is completed, you can enable the providers via

**Configuration > [Taleo Performance] Administration > [Development Planning] > Development Activity Providers**

## Viewing Details About a Development Activity

Viewing details about a development activity allows the user to see all the information provided for an activity, such as the activity's specifications (start and end dates, status, linked items), the activity's progress and even an history of all related events. Such information can be viewed for activities that are part of a development plan or archived activities.

**Performance > [Navigation bar] Development**

If a development plan has never been created, start by creating a plan by clicking **Create**.

1. From the Activities tab in the Development Plan, click the activity you want to view.

The **Development Activity Details** are displayed and shows all the information that was provided about the activity.

You can click the left button to return to the **Activities** tab or click the arrows to page through the other activities in the development plan.

## Contextual Development Activities

While development activities are always listed in a development plan, they can be created in, and associated with, other modules.

Linking an activity to a specific context enables activities to be associated with talent profile competencies, goal plans, career plans and performance reviews. The context is established when creating the activity within the module or linking it via the development plan module afterwards.

By default, when you create an activity in a module it is linked to that module. You can select to change the context in the **Create a Development Activity** dialog, however, as one of the steps during the creation process of by using the **Link** action menu option in the development activities list.

## Creating Development Activities outside a Development Plan

**Performance > [Navigation bar] Profile > Competencies > Development Activities**

**Performance > [Navigation bar] Career > Step 1 and greater**

1. Click **Create an activity**.
2. Enter the required values and click **Next**.
3. Click **OK** to accept the default activity linking - or - proceed to the next step to customize.
4. Select from the available custom and system contexts and add them to the list.

Multiple context types can be associated with each activity.

5. Click **OK**.

The development activity is linked to the selected items and added the user's development plan.

## Creating a Private Activity

Creating an activity is done to add a custom and private activity to an employee's development plan, that is an activity other than from the development library.

**Performance > [Navigation bar] Development**

If a development plan has never been created, start by creating a plan by clicking **Create**.

1. In the **Development Plan** page, click the plus icon and select **Create an activity...** to create a new custom and private activity for yourself.
2. In the **Create a Development Activity** window, enter a name and a description for your activity and any other desired information.  
The **Name** field is limited to 200 characters and the **Description** field is limited to 1000 characters.
3. If custom categories have been defined, you'll have the option to assign a category to the activity.
4. Click **Next**.
5. Select the items to which you want to link your activity by first selecting the context and then the specific related item in the list of available items.

Note that you can add multiple items, but each must be selected and added one by one.

If you select a custom context, you have the ability to add new contexts right from this window by clicking **Create custom context**.

6. Click the plus icon to add your selection in the list of selected items.
7. Click **OK**.

The newly created activity is added to the development plan.

If you want to provide additional information about the activity, select the activity to view its details and make your modifications as needed on the **Development Activity Details** page.

## Linking an Activity to a Specific Context

### Performance > [Navigation bar] Development

If a development plan has never been created, start by creating a plan by clicking **Create**.

1. From the **Activities** tab, click the Right Arrow icon and select **Link...** for the required activity.
2. In the **Link Development Activity** window, select the items to which you want to link your activity by first selecting the context and then the specific related item in the list of available items.

Available job roles depends on how many different job roles have been added to the employee's career plan.

You can add multiple items, but each must be selected and added one by one.

If you select a custom context, you have the ability to add new contexts right from this window by clicking **Create custom context**.

3. Click the plus icon to add your selection in the list of selected items.
4. Click **OK**.

The activity is linked to the selected items. Linked activities can be viewed by their context in the **Development Plan** page.

## Archiving an Activity

Archiving a development activity is done to remove an activity from the development plan without deleting it, therefore allowing the user to keep it for future reference, whether it be to recommend or share it with someone else or to view its details once the activity is completed.

### Performance > [Navigation bar] Development

1. From the **Activities** tab, click on the activity that you wish to archive.
2. From **More Actions**, select **Archive...**
3. In the **Archive a Development Activity** window, rate and comment on the activity and click **Finish**.
  - o Note you cannot rate, share, or add comments to a Oracle Taleo Learn activity.

The activity is removed for the active development plan and is available via the **Archived Activities** tab.

Archived activities can be recommended or shared, depending on whether the activity is created by the user or taken from the development library, but cannot be reinserted in the development plan. Once archived they cannot be unarchived.

## Sharing an Activity

Sharing an activity allows the user to share a custom activity that he/she has created with another user.

### Performance > [Navigation bar] Development

For a custom activity to be shared, it needs to be archived first.

1. If the activity is not archived, from the **Activities** tab click the activity:
  - a. Select **More Actions > Archive...**
  - b. In the **Archive a Development Activity** window, choose to share the activity with your fellow employees as part of the archiving process by selecting **Next**.
  - c. Select the employees that you want to share the activity with and click **Finish**.
2. If the activity is archived, select the **Archived Activities** tab and click the activity.
3. In the **Development Activity Details** page, click **Share**.
4. In the **Share a Development Activity**, select the employees with whom you wish to share the activity by first selecting the source and then the employees in the list of available employees.

Note that you can add multiple employees, but each must be selected and added one by one.

5. Click the plus icon to add your selection in the list of selected items.
6. Click **Finish**.

Note you cannot share Oracle Taleo Learn activities.

## Recommending an Activity

Recommending an activity allows the user to suggest to another user an activity taken from the development library, whether the activity is part of his current development plan, archived or just in the result list of an activity search operation.

### Performance > [Navigation bar] Development

Only activities that are part of the development library can be recommended.

1. From the **Activities** or **Archived Activities** tab, click an activity and then select **More Actions > Recommend...**  
You can also select the right arrow icon and **Recommend...** for an activity from the Development Activity Search results list.
2. In the **Recommend a Development Activity** window, select the employees to whom you wish to recommend the activity by first selecting the source and then the employees in the available list.
3. Click the plus icon to add your selection to the list of selected items.
4. Add comments and click **Finish**.

Since the same activity can only be recommended once to the same employee, if an employee cannot have the activity recommended to them, a message is displayed explaining why.

The activity is recommended to the selected employees and will be displayed in the **Recommendations** of each selected employee, who will have the choice of accepting or declining the recommendation.

## Development Activity Comments

You can create, edit and delete comments for an employee's development activity.

Comments can be left on development activities by line managers and employees. Comments are viewable by anyone who has access to the activity; however, the actions that can be taken on a comment are dependent on its owner. Only the owner of the comment can edit or delete it.

## Commenting on Development Activities

**Performance > [Navigation bar] Development**

1. From the **Activities** tab, click an activity.
2. Click **Add** in the **Comments** section and enter text.
3. Click **Done** and then click the Disk icon to save.

## Viewing Recommended Activities

Viewing recommended activities allows the user to see all the development library activities that have been recommended by others, either to him if viewing his own plan or to the employee whose plan is in display.

**Performance > [Navigation bar] Development**

If a development plan has never been created, you won't be able to see the left pane **Menu** box and you'll need to start by creating a plan by clicking **Create**.

1. Select **Recommendations** from the left pane.  
All the activities recommended to the employee are listed and show the information about the activity, as well as the rating and comment from the person who recommended the activity.
2. You can choose to add the activity to the development plan by clicking **Accept**; otherwise, you can select **Decline** to remove the activity from the recommendations.

Recommended activities can be accepted or declined.

## Viewing Archived Activities

Viewing archived activities allows the user to see all the activities that have been removed for the active development plan to be placed in an archive for later use.

**Performance > [Navigation bar] Development**

**Performance > [Navigation bar] Development**

If a development plan has never been created, you won't be able to see the left pane **Menu** box and you'll need to start by creating a plan by clicking **Create**.

1. From the **Archived Activities** tab, click an activity.

Archived activities can be recommended, assigned, and shared, depending on user permissions and whether the activity is created by the user or taken from the development library. Activities cannot be reinserted in the development plan.

## Rating an Activity

Rating an activity allows the user to provide his appreciation of a completed activity and is performed as part of the archiving process.

### Performance > [Navigation bar] Development

1. In the **Activities** tab, click the activity that you wish to archive and rate.
2. Select **More Actions > Archive...**
3. In the **Archive a Development Activity** window, rate the activity using the stars and provide a comment.
4. Click **Finish**.

The activity is archived, along with its rating and comment.

Archived activities can be recommended or shared, depending on whether the activity is created by the user or taken from the development library, but cannot be reinserted in the development plan.

Note that you cannot rate Oracle Taleo Learn activities.

## Assigning an Activity to a Direct Report

Assigning an activity allows a manager to quickly add an activity to the development plan of one or multiple direct reports at once, whether the activity is in his own development plan or in the development plan of a direct report.

The activity assignment feature is only available to users whose user type includes the corresponding permission.

### Performance > [Navigation bar] Development

1. From the **Activities** tab, select the activity that you want to assign to other employees.  
You must not click the activity link, but select the activity so that it is highlighted.
2. Click the Person with Right Arrow icon and in the **Activity Assignment** window, select the direct reports you want to assign the selected activity to, by placing a check beside the name.

Since you can assign an activity to a maximum of ten direct reports at once, you might need to repeat the assignment process if you have more direct reports to whom to assign the activity.

3. Click **OK**.

Note that an activity cannot be assigned to an employee whose development plan already includes the activity or if the plan is under approval. An activity might also not be assignable if the development plan of the selected employee has not yet been created or is already approved; both of which depend on the assignment settings defined in the development plan template.

If the activity is assigned successfully, the selected employees will see the assigned activity in their development plan.  
If the activity could not be assigned, a window will display the employee for whom it didn't work and the reason.

## Working with Mentoring

### Mentoring

Part of Development Planning, the mentoring functionality allows for formal mentor or development coach relationships to be created in the system.

Many organizations have some form of mentoring program in place since it is an excellent way to preserve organizational knowledge.

When a mentoring relationship is established and upon configuration of the proper mentoring settings, the system affords the mentor special access to view information about the mentee, such as the mentee's career or development plan. This access facilitates the dialog between the mentor and mentee, which can be captured by the system in the form of feedback tracking meetings, discussions, follow-ups and words of wisdom that the two parties might exchange.

Julia may want to move from her current job function in Marketing to a new job function in Sales. Her manager is a logical choice to mentor her in her current role, but he isn't necessarily the best person to mentor her to make the job change across functions. Therefore, she could benefit from a mentor who would be well-suited to help her achieve her career goal. Her manager can assign a suitable mentor for her.

### Configuration

Various user type permission related specifically to mentors must be granted.

User Type Permission	Description
<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; 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; 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; 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; 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; 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; 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.

User Type Permission	Description
<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 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 this user is a mentor.</b>	The user has write access to the talent profiles of employees he is mentoring.

## Assigning a Mentor

A mentor is assigned when a manager requests a mentor for one of his reports, which automatically establishes the mentoring relationship between the selected mentor and mentee.

The mentoring feature must be enabled and the related user type permissions granted.

### Performance > [Navigation bar] More dropdown Mentoring Center

1. Locate the employee to whom you want to assign a mentor and click the down arrow icon on the employee's performance card to select **Request Mentoring...**
2. In the **Request Mentoring** window, click the down arrow icon in the contact category to select appropriate category and then select the employee you wish to assign as a mentor.
3. Provide a comment, as it is mandatory.
4. Click **Send** for the request to be sent to the selected mentor.

The mentor request is sent to the selected mentor and the mentee is added to the mentor's **Mentoring Center**.

## Accessing the Mentoring Center

The Mentoring Center is accessed to view all the mentoring relations of an employee and to maintain those relationships.

The mentoring feature must be enabled and the related user type permissions granted.

### Performance > [Navigation bar] > More dropdown > Mentoring Center

1. Once in the **Mentoring Center** page, you can see all the mentees that have been assigned to you.

You can maintain the relationship and send feedback to a mentee or break the mentoring relationship.

## Writing to a Mentee

Writing to a mentee allows a mentor to send his/her mentee feedback about his/her development plan activities.

### Performance > [Navigation bar] > More dropdown > Mentoring Center

1. In the **Mentoring Center** page, locate the mentee to whom you want to write.
2. In the information box, click **Send Feedback**.
3. In the **Provide Feedback** dialog enter your feedback in the text box and format the text as needed.  
The text entry area allows for a maximum 6,000 characters. A counter lets you know how many characters you have left or are over the limit. Once you have reached the limit you can continue typing and editing, but the system will not allow you to save if the count is over the limit.
4. Optional. In the Approval section you can select an approver, if desired.
5. When input is complete, click **Send**.

The mentee and/or the manager of the mentee will receive the message in their **Feedback Journal**, with the **General** subject.

## Reading Feedback Provided by a Mentor

All feedback comments provided by the mentor to the mentee can be read by the mentee from his/her journal and is treated as unsolicited feedback

### Performance > [Navigation bar] > More dropdown > Feedback

1. On the Feedback page, select the **Received** tab at the top of the results list.  
The results list displays feedback received about yourself, solicited or unsolicited ; pending requests for feedback about yourself (requested by yourself or someone else); and requests for feedback about yourself (requested by yourself or someone else) that are pending approval.
2. To only see feedback that a specific mentor has sent, you can select this person's name in the **About** filter. You can also choose to sort the feedback by the column **Subject** and locate and read all the **General** ones.
3. On the Feedback page, select the **Received** tab at the top of the results list.  
The results list displays feedback received about yourself, solicited or unsolicited; pending requests for feedback about yourself (requested by yourself or someone else); and requests for feedback about yourself (requested by yourself or someone else) that are pending approval.

## Ending a Mentoring Relationship

The established mentoring relationship can be ended by the mentor at any time.

### Performance > [Navigation bar] > More dropdown > Mentoring Center

1. In the **Mentoring Center** page, locate the mentee for whom you want to end the mentoring relationship.
2. In the information box, click the delete icon to remove the mentee from your **Mentoring Center**.

The mentee is automatically deleted from the **Mentoring Center** and the mentoring relationship is terminated.

# Working with Learning Management Systems

## Learn Integration

Learn and Development have been unified to provide users a singular view of their total learning and development activities. This combines the strengths of both products to provide a total learning and development solution for users.

The integration of Taleo Development and Taleo Learn provides multiple methods for populating a given employee's development plan:

- Taleo Learn administrators can assign learning activities to employees based on criteria such as, their job, department, or location
- employees can search the Learn item catalog and self-register for development activities, enabling employees to be actively engaged in their professional development process
- employees can create custom activities, such as on-the-job learning, mentorships, and other company initiatives on an ad-hoc basis

Taleo Learn supports multiple types of learning items, approvals and enrollment for those learning items. This increases the options available for the type of development activities that can be added to someone's development plan.

Learn items can be added as independent development activities and added to a custom context. Items that require enrollment or approval can be added and their processing will be handled within the Taleo Learn Center.

When a Learn item is added to an employee's development plan, its details are saved as a development activity in Performance. This enables the details of the Learn item to be included in reports and when printing. When a Learn item is updated in the Learn Center, this update will be relayed to Performance, so that the data in the development plan accurately reflects the current state of the Learn item.

After adding Learn items to a development plan, any actions or updates that affect the progress or details of a Learn item occur within the Learn Center. This includes actions such as, approvals and enrollment, and updating completion status and scores. Within the development plan you can comment on the Learn item, link it to a context, and view its history.

Once a Learn item is completed it can then be archived. You cannot share, rate, or enter additional comments for Oracle Taleo Learn activities when archiving them. Rating and sharing is done within Taleo Learn.

For details on Oracle Taleo Learn, see their *Online Help*, or the *Oracle Taleo Learn documentation on the Oracle Technology Network (OTN)*.

## Configuration

1. Customer must make request to Oracle Sales or Support to have Oracle Taleo Enterprise Edition Learn enabled for their zone.
2. Oracle Production and Services complete the implementation steps outlined in the *Operations Guide - Learn User Integration Configuration Guide*.
3. Configure Learn user type permissions per the *Access to Learn* section of this document.
4. Configure Performance settings as indicated below:

Configuration > [Performance] Settings		
Name	Description	Setting Security
Enable Development Search	Yes enables the <b>Search for an activity...</b> and <b>Assign Activities</b> option for user's with the required Development Plans user type permissions. This must be enabled to search for development activities, regardless of content provider or development activity library. When set to <i>No</i> you cannot search for a development activity and the remaining three settings do not affect the system. The default value is <i>Yes</i> .	Public
Search Content Provider	Indicates whether the Performance development activity library or Taleo Learn is used to provide activities for development plans. If <i>Taleo Learn</i> is selected, additional configuration is required. The default value is <i>Development Activity Library</i> For TEE to Learn integration to work the Taleo Learn catalog must be enabled and the Performance Development Activity Library disabled.	Private
Taleo Learn Search URL	This provides the address for the library of development activities that users search through when the Search Content Provider setting is Taleo Learn. If the content provider is not Taleo Learn this setting is not used. This is a static URL that will need to be updated manually if there are any changes in the production environment.	Public
Taleo Learn Item Detail URL	This is required for the Taleo Learn UI widget that is displayed in Performance. This is a static URL that will need to be updated manually if there are any changes in the production environment.	Public

The following fields are imported from Taleo Learn and used in the Development Plan module:

Taleo Learn Fields		
Code	Duration	Location (Facility)
Cost	End Date	Name
Currency	Equivalent Titles	Objective
Description	ExternalID	Prerequisites
DevelopmentCourseDurationType	Institution (Provider)	Start Date
DevelopmentCourseScoringType	Language	URL

## Working with Oracle Taleo Learn Items

Oracle Taleo Learn items can consist of Instructor Lead Training (ILT) sessions, Virtual Instructor Lead Training (VILT) sessions, online e-learning courses, course enrollments and more.

When working with these items in Performance, you can search for and view them, add them to your development plan, later review item changes or progress, and archive them.

- [Adding Learn Items to a Development Plan](#)
- [Viewing Learn Items](#)
- [Archiving Learn Items](#)

## Adding Learn Items

When your system is using Oracle Taleo Learn as the Development Activity Library, you can select Learn items as your development activities.

When searching for Learn items to add, you can filter by category and keyword. Keywords search Learn item names and descriptions. Categories can be thought of as folders in which you keep related items. Categories help manage various Oracle Taleo Learn items, such as enrollments, ILT sessions, classes, assignments, assessment-related items, skills, and job profiles.

You can add Learn items from development plans, goal plans, performance reviews, career plans, and the talent profile.

To Add Oracle Taleo Learn Items

A development plan must exist.

### [Navigation bar] > Development

1. Click the Plus icon and select **Search for an activity**.

By default, the Development Activity Search list displays all the Learn items in the library.

2. Enter search criteria and select a category and click **Search**.

The categories available are dependent on your implementation.

3. Hover over an item and click the Right Arrow icon and select **View details** for the item you want to add.

4. Review the item and click **Add to plan**.

5. In the Link Development Activity window select the context for the activity.

**Competency** - Lists the competencies you have in your talent profile.

**Employee Goal** - Lists all of your goals that are not started or in progress.

**Job Role** - Lists the job roles for each scenario in your career plan.

**Review Item** - Lists all the review items that are included with your performance reviews.

**Custom Context** - These values are created by users and enables you to group together development activities in a manner that is meaningful to your organization.

You can link multiple items, but each must be selected and added one at a time.

6. Click **OK**.

The item is added to your development plan as an activity.

## Completing Learn Items

You can use the **Launch this Activity** link from within a development activity, to access the Learn item and work on completing it.

Once launched, the activity is displayed in a new window. What you can do from that window is dependent on the type of Learn item it is. For instance, if it is a web-based course you can complete it directly within that window, whereas if it is a director-led classroom course you may only be able to update your progress. Regardless of the type, as you complete the Learn item your progress is updated accordingly in Performance.

To Launch an Activity

A development plan must exist.

### [Navigation bar] > Development

1. Select the development activity name.
2. Click **Launch this activity**.  
A new browser window opens to display the activity.
3. Work on the activity as needed and close the window.  
**Progress** is updated, indicating how much of the activity has been completed. How these are completed is dependent on their type.
4. Click **Add** in the **Comments** section if additional information needs to be added.  
This comment is added to the Learn item in Performance and is not associated with the item in Oracle Taleo Learn.
5. Click the Disk icon to save.

When all the components of the activity have been completed, it will have a **Status** of **Complete**.

### Viewing Learn Items

You can view Learn items to preview them before adding them to your development plan, or to review changes made to an item that is already part of your development plan.

When a field is not used by a Learn item, **N/A** is displayed. If there is an empty field that means it may be used, but currently has no value.

When looking at Employees' Reviews, only reviews that were entered for the Learn item in Oracle Taleo LearnCenter are available.

To View Learn items

A development plan must exist.

### [Navigation bar] > Development > Development Activity Search Results

1. Hover over an item and click the Right Arrow icon and select **View details**.  
The most current information on the item is displayed.
2. Click **Preview this event** to open a new window from where you can view additional details on the components that make up the activity.  
This may not be available for all items. You can preview an e-Learning course without it counting against the completion of that course.
3. Use **Sort By** in the **Employees' Reviews** section to filter reviews from LearnCenter users for the item.

Click the Up Arrow icon to return to the development activities or if you are viewing the item while searching, click **Add to plan**.

### Archiving Learn Items

Development activities based on Learn items can be archived, but there are some differences from a standard activity.

Archiving a Learn item helps limit the list of development activities in Performance to current activities. It does not impact the item in the Oracle Taleo LearnCenter. You cannot share, rate, or enter additional comments for Oracle Taleo Learn activities when archiving them, unlike a custom activity.

If there are any updates or changes to a Learn item that has been archived, it is unarchived and returned to the **Activities** list. This can include changes such as, when a recurring item reaches its recurrence date, a change in the description, or anything else that alters the item's content.

## Integration with Learning Management Systems

Via Taleo Connect Client, customers are able to import data into an employee's development plan, as well as export data out. More importantly, they can synchronize development activities with an external system.

Taleo offers, via Taleo Connect Client (TCC), import and export services for Development Plan and Development Goal entities.

Development activities can also be contextualized using Taleo Connect Client. Previously, courses and other items could be loaded into the Development Library using TCC. However, if a client customer wanted to tie that course to a competency, OLF, or job level, they had to do so in Performance Administration - now, this association can be done via Taleo Connect Client.

For example, clients use an LMS to track and manage courses. Employees have the course in a plan on the LMS. They may also want to track that course on Performance's development plan. The new TCC capability would allow the customer to build an integration that maps an activity in the external LMS to the course on the employee's development plan in Performance so that fields like status and progress can be synchronized. With this process, employees don't have to remember to update the course information in both systems.

These integration services provide the ability to perform the following actions:

- Ability to create a development activity on an employee's development plan using TCC by populating a number of different fields.
- Ability to export the content of an employee's development activity from a development plan using TCC (employee ID, development activity name, description, start and end dates, status, progress, etc.)
- Ability to update fields on a development activity via TCC (status, progress, description, etc.)

### Configuration

The learning management system provider URL is configured by Oracle via **Configuration > [SmartOrg] Administration [Production Security] Authentication Configuration SAMLSPURL Configuration**.

### Accessing a Third Party Training Course

Your Performance system must be integrated with a third party Learning Management System (LMS).

You must have the required Development Plan and Learning user type permissions.

**Performance > [Navigation bar] > More dropdown > Learning**

1. Click the provider name.

A new window is displayed, presenting the learning environment. If a password is required it will be your Oracle Taleo password.

# 8 Talent Pools

## Using Talent Pools

A talent pool enables your organization to designate a pool of employees and candidates for analysis and calibration. Talent pools facilitate collaboration between your organization's HR team and stakeholders of functions such as succession plans and workforce planning.

Talent pools provide the ability to increase the scope of succession planning by working independently with performance matrices outside of that module. By associating a job role with a talent pool, it enables an organization to create and foster a pool of employees with the potential to act as successors for multiple positions across the company, instead of being focused on a specific position.

For this, you need the following:

- *Defining Your Talent Pool*
- *Populating Your Talent Pool*
- *Filtering Your Talent Pool*
- *Evaluating Members using a Matrix*
- *Evaluating Members using Charts*
- *Assigning Development Activities to Pool Members*

## Defining Your Talent Pool

You must define your talent pool before you can begin working with it. This involves creating a talent pool, assigning users to collaborate on it and, in instances where it can be used for succession planning, designating its context.

The key components are:

- The owner, who by default is the person creating the pool. The pool owner is the only user that can edit the name, description, owner and context. Only owners can add collaborators.
- Pool context identifies its purpose. Selecting position means the pool can be used for succession planning for that specific position, belonging to a specific employee. Job role can also be used for succession planning, but by increasing the scope to that level it enables multiple positions to be targeted. This helps avoid creating redundant pools with duplicate resources. Selecting none enables the pool to be used for purposes outside of succession planning.
- Collaborators are the users who work with the pools. They can add pool members, rank members by moving them to different matrix cells and assign development activities. It is important the collaborators have the required user permissions to access the details of pool members.

## Defining a Talent Pool

### [Navigation bar] > More dropdown > Talent Pools

1. Click the plus icon to display the New Talent Pool window.
2. Enter a mandatory name and a brief description.
3. Select an owner and pool context, by using the selector window if required.  
Pool context can initially be left as None and changed to a Job Role or Position later.
4. Click Next to display the Users list page.
5. Click the plus icon to choose the users who will have access and be able to collaborate on the talent pool, and click Select.
6. Click OK to save the talent pool and display the Members tab.

Members can now be added to the talent pool.

## Talent Pools Comment Support

Users can provide comments when performing Talent Pool activities. Comments provide justification and context so when users return to the transactions at a later date, they have a historical record of why decisions were made and what discussions took place.

Characteristics of comments in Talent Pools:

- Comments are not mandatory.
- If the Comment dialog is left blank then no comment instance is created or tracked.
- Add Comment dialogs have text areas that can take a maximum of 6000 characters.
- Comments can be added, edited and deleted.
- A single comment may be directed to multiple people selected from a list at the same time.

When adding members to a Talent Pool either via the People Selector or the Advanced Search, users are presented with a Comment dialog box that gives them the opportunity to add a comment as they add the member to the Talent Pool. Adding a comment is not mandatory, so if one is not desired, users can leave the comment blank and select *Cancel* to add the member without a comment.

Users will also be prompted to enter a comment when they remove a member from a Talent Pool. In this case, the pop-up is both a "second chance" confirmation to be certain a users intent was to remove the member, as well as an opportunity to enter a comment.

All comments that are entered for this member are stored in the memory. In the future, should this member be added to the Talent Pool again, all the comments prior to the removal will be restored for this member.

A comment is optional; click *Yes* without entering a comment and the member will be removed from the Talent Pool.

### Methods for Entering Comments

- Adding Comments Using the Contextualized Menu

Add a Comment about a Member within a Talent Pool...	Navigation
When you use the <i>View available actions</i> contextual selector	<b>[Navigation bar] &gt; More dropdown &gt; Talent Pools &gt; (select Talent Pool &gt; (highlight member) &gt; View available actions &gt; Add Comment &gt; Add Comment dialog</b>

- Adding Comments Using the Toolbar More Actions Menu

Using this option allows users to add a single comment to multiple members at the same time.

Add a Comment about a Member within a Talent Pool...	Navigation
When you use the <i>More Actions</i> toolbar menu	<b>[Navigation bar] &gt; More dropdown &gt; Talent Pools &gt; (select Talent Pool &gt; (select member(s)) &gt; More Actions &gt; Add Comment &gt; Add Comment dialog</b>

- Adding General Comments about the Talent Pool as a Whole

When a comment is added using this method, it is always applied to the Talent Pool as a group, not to an individual. This is true even if one or more individuals is selected in the Talent Pool.

Add a Comment about an entire Talent Pool...	Navigation
When you use <i>Add Comment</i> on the toolbar	<b>[Navigation bar] &gt; More dropdown menu &gt; Talent Pools &gt; (select a Talent Pool) &gt; Add Comment &gt; Comment Dialog</b>

### View Recent Comments Pop-up and Editing and Deleting Comments

In the Comment column on the Talent Pool, there's an actionable indicator that displays the number of comments associated to each member.

The screenshot shows the 'Succession Nomination Talent Pool' interface. It features a table with columns for Type, Name, Job Title, Review Rating, Risk of Loss, Potential, and Comments. The 'Comments' column for Jonathan Coleman shows a comment icon with the number '2' next to it, which is circled in red in the original image.

Type	Name	Job Title	Review Rating	Risk of Loss	Potential	Comments
	Jonathan Coleman	Sr. Director, Planning & Process	N/A	Medium	Low	Had a conversation with Jo... 
	Constance Lewis	Research Analyst	4.0	Medium	Low	-
	Tonya Murphy	Sr. Market Research Analyst	N/A	High	High	-
	Cheryl Peterson	Market Research Analyst	N/A	Medium	Medium	-
	Angel Sanchez	Director, Market Research	4.0	Medium	Low	-
	Julia Savard	Senior Director, Territory Operations	N/A	Low	High	-
	Brittany Smith	Research Analyst	2.0	Low	Medium	-
	Henry Stevenson	Director, Facilities Research	5.0	Medium	High	-

Once *View recent comments* is clicked, a pop-up displays with all the comments for that successor. Scrolling is enabled if there are many comments. If there are more than 10 comments, the *View More Comments* link displays. Once this link is clicked, scrolling is enabled and users are able to view all of the comments by scrolling. Clicking the pencil icon brings up the options to edit or delete any or all of the existing comments. Possible misspellings are underlined in red.



**Note:** Users are only able to edit or delete the comments that they own/authored. The pencil icon only displays next to those comments that are editable by the logged in user.

## Comment History Tracking

Every time a comment is added, edited or deleted, the event is recorded in the History.

# Populating Your Talent Pool

Collaborators and owners add employees and candidates to talent pools, who are then known as pool members.

Pools can be populated using the employee selector or by using advanced search:

- Adding pool members uses the employee selector to search through direct reports, network and keywords. This method is best for smaller pools where the collaborators have first-hand knowledge of prospective pool members.
- Advanced search uses Talent Search criteria to focus on pool members that fit specific parameters. This is most useful when the group of prospective members is too large for the collaborators to search through without filtering.

## Adding Pool Members

[Navigation bar] > More dropdown > Talent Pools > Members

1. Click the Down Arrow icon and select **Add Members**.
2. Select **Search in my employees** to find members by drilling down through your direct and indirect reports and delegated employees, or **Search in my network**, or **Search by keywords** to search either employees or candidates.

Keyword search checks username, first name, middle initial, last name, and email address fields. You can select **Extended Search** to enable fields in the employee's talent profile and additional fields associated with candidates to be searched.

3. Select the check box for the people in the **Search Results** list you want to include in the pool and click the Right Arrow icon to place them in the **Selection** list.  
Selecting **Include Direct Reports** will automatically add the selected employees' direct reports.
4. Click **Select** to add those in the **Selection** list to the pool.

The users are added to the **Members** list.

## Searching for Pool Members

[Navigation bar] > More dropdown > Talent Pools

1. Select a talent pool to display the **Members** tab.
2. Click the Plus icon and select **Open Advanced Search**.

Selecting **Add Members**, displays the People Selector.

3. Select the criteria you want to use to filter your results and click Search.
4. To add a single person from the Employee column, click the Right Arrow icon to display the Go To menu and select **Add to current pool**.
5. To add people, select the checkboxes for each person you want to add and click **Actions**, the Down Arrow icon and select **Add to current pool**.

If one of the people selected is already a pool member, the Add to current pool option is not available.

The people are added to the pool. You can return to the pool by clicking the Up Arrow icon.

## Filtering and Managing Your Talent Pool

Talent pools can be filtered to narrow the focus of larger pools on members who meet specific criteria.

The filters available are contextual and dependent on which modules you are using in your system. They can contain set values in drop-down lists, organization values, free text, dates and customized values. In an instance where you are looking for potential successors, you could use these options to filter your talent pool based on employees with high potential and readiness for promotion. Filters can be used before switching to matrix or chart mode, which helps display only the applicable pool members and enables those modes to display quicker.

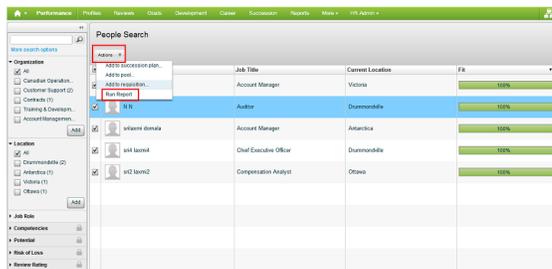
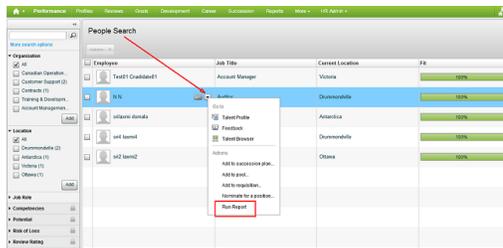
HR Administrators and Managers can easily manage and gain insight into Talent Pools and their individual members using filtering and sorting tools within the Talent Pools. Filters on the Talent Pool List page enable users to enter search parameters to help narrow their search for specific Talent Pools or information contained within those pools. Also on the Talent Pool List page as well as the Talent Pool Members page, is the Results Per Page dropdown. This feature allows users to determine how many search results, Talent Pools or Talent Pool members, are displayed on a single page.

You can add members to a Talent Pool or Succession Plan directly from the search results page. Single or multiple members can be added to plans and pools. If there is more than a single page of members, which will be determined by the selection in the Results Per Page dropdown, a popup is invoked. This Apply the Action to popup gives the option to add either only the selected members or all members to a Succession Plan or Talent Pool.



**Note:** The Apply the Action to popup is only invoked if the number of members in a Talent Pool exceeds a single page. For example, if the Results Per Page is set to 20 and there are only 20 members in a Talent Pool, the popup will not display. However, if the pool contains 21 members (one more member than will fit on a single page) then the popup is invoked and displays.

Users are also able to filter their Talent Pools for reporting purposes and when adding members to Talent Pools or Succession Plans directly from People Search. Users are able to enter search parameters using the newly added Talent Pool Selector filters to easily find the Talent Pool or pools that they wish to report from. This same set of filters is available when users are adding members to a pool directly from People Search. To access these filters, users click the dropdown arrow next to the employee they wish to report on and select Run Report or they can select multiple employees and select Run Report from the Actions menu.



The Talent Pool Selector filters are available from both the Employee and the Talent Pool tabs in the Run Report popup.

## To Filter your Talent Pool

[Navigation bar] > More dropdown > Talent Pools > Members

1. From the **Filters** panel select the required values from the available filters.
2. Click the Refresh icon to apply the filters to the members list.

The filter results are persistent and the same pool members are displayed whether you select members, matrix or chart mode.

## Matrices and Talent Pools

Using a matrix enables collaborators to better visualize and analyze the distinction between pool members on a cell matrix using two data points (X and Y axis values), where Performance and Potential dimensions are the default axes values.

When a matrix is configured and subsequently used, the members who have been added to the pool and have data for each of the dimensions will be included in a matrix cell accordingly. Members who do not have a data value for one or more of the dimensions are placed in a list of unrated employees and must be manually added to the matrix.

Moving members between cells is completed by dragging and dropping and enables you to override the default positions, based on the matrix axes. When a member is initially moved, both the original and overridden cell placement are stored in the database. These updated metrics apply solely to the matrix for that specific talent pool, however, member's who are currently employees can have their overall employee metrics updated directly from the matrix. Once updated the members can no longer be returned to their original cell.

## Matrices and Talent Pools

### [Navigation bar] > More dropdown > Talent Pools > Members

1. Click the Grid icon to open the default system matrix and the rated members are displayed in their appropriate cells.  
Switching matrices, can change which members are displayed and in which cells they are positioned, based on the X and Y axis values.
2. To move a member, select their name and drag and drop them into a different cell.
3. To include excluded members, select Show Unrated Pool Members from the Action menu and from the window drag and drop them into matrix cells.  
The icons of moved members include an arrow.
4. As well as dragging members between cells, you can update their employee metrics or restore them to their original cell
  - a. To update a single member, from their shortcut menu select Update Employee Metrics and click OK or to update all moved members select Update Employee Metrics from the main menu and click OK.
  - b. To restore a member, from the shortcut menu select Restore to original cell.
5. Click the Show Details icon to display the Cell Details page, where members can be dragged and dropped between cells and where from the More Actions menu you can choose to update a pool members metrics based on which cell they are in.
6. Click the print icon to display a PDF version which can be printed and reviewed.

To help ensure employees with high potential are prepared for new roles, you can assign development activities.

## Evaluating Members using Charts

Charts provide a graphical representation of pool member data.

Charts can contain a wide range of business critical data, such a potential, promotability readiness and risk of loss. You can display the details of each chart bar to get a detailed listing of the members in that car and to display their respective employee metrics. If so configured, charts can provide drill-down capability for viewing members and updating their data in relation to the selected chart.

### To Evaluate Members Using Charts

Your system administrator must have associated charts with talent pools.

#### [Navigation bar] > More dropdown > Talent Pools

1. Click the name of the pool and then click the Graph Chart icon to display Chart mode.
2. The default chart is displayed, showing pool members that have corresponding data, enabling them to be included in the chart.  
Pool members that are missing the required data to be displayed in the chart are included in the unrated population.
3. The following actions can take place:
  - a. From the Charts list, select a different chart and the members are redistributed according to the parameters of that chart.
  - b. Click Show Details to display the Bar Details view, from where you can select a bar segment to display member details and drag and drop members to different chart segments.

- c. Click Unrated Population/Show Details to display pool members that are not automatically included in the chart and add them to the chart where required.

## Assigning Development Activities to Pool Members

All existing development activities in the system are available to be assigned to pool members.

Development activities can be assigned to pool members by owners and collaborators, regardless of their overall user permissions for development plans. This means it is possible to add activities, but not be able to subsequently view that user's development plan.

### Assigning Development Activities to Pool Members

**[Navigation bar] > More dropdown > Talent Pools > Members**

1. From the Members list view, select checkboxes for the members and click Assign Activities.
2. Use the Development Activity Selector to choose the required development activities and click Select.
3. Click Yes in the confirmation dialog box.

The development activities are added to the user's development plan.

## Talent Pool Housekeeping

Once you have configured your talent pool, the subsequent actions and reference information may be required:

- A history of the changes made to a pool is available: [Viewing Talent Pool History](#)
- Depending on your overall user permissions, you can view member details: [Viewing Pool Member Details](#)
- If you are a pool owner, you can remove pools from the system: [Deleting a Talent Pool](#)
- Reference of the user interface: [Talent Pool Fields](#)

## Viewing Talent Pool History

A history record contains information on a change made to a talent pool, including the date, details and user making the change.

**[Navigation bar] > More dropdown > Talent Pools**

1. Select a talent pool from the list.
2. Select the History tab.

All of the changes that have been made to the talent pool since it was created are displayed. Select a column header to sort the list based on the values of that column.

## Deleting a Talent Pool

Ensure you want to delete the talent pool, as the action cannot be undone.

**[Navigation bar] > More dropdown > Talent Pools.**

1. Select the check box for the item to be deleted.

Multiple talent pools can be selected for deletion at the same time.

2. Click the minus icon and click Yes in the confirmation dialog box.

The talent pool is deleted and removed from the list. Deleting a talent pool only removes the talent pool object from the system. It does not affect users or members associated with it.

## Viewing Pool Member Details

**[Navigation bar] > More dropdown > Talent Pools**

1. Click the name of the talent pool to display the Members tab.
2. In List mode, click the Right Arrow icon beside the pool member's name and select the required module from the Action shortcut menu.

Depending on your association to the pool member, different options, such as talent profile, goal plan, or succession plan will be available.

The selected module page is displayed.

To return to the talent pool select the browser back button.

## Talent Pools Fields

Fields and buttons displayed in Talent Pools are presented in the following table. Each entry in the table includes a field or button, a description, possible values (when they are predefined), the part of the application to which the field or button applies, and the header of the field or button.

Field	Description	Applicable to	Header
Add Employees	This displays the People Selector and enables members to be added the pool.	Talent Pools	Members
Assign Activities	This is used to choose from existing development activities and assigns them to the selected pool members.	Talent Pools	Members
By	Provides the name of the user who did the action.	Talent Pools	History

Field	Description	Applicable to	Header
Date and Time	Time the action occurred.	Talent Pools	History
Description	Description of the pool	Talent Pools	Talent Pools, Details
Details	Indicates what was actioned.	Talent Pools	History
Display the List Mode	This is the default view for the Members tab and displays pool members in a list.	Talent Pools	Members
Display the Matrix Mode	This displays the pool members in a matrix, where all the matrices enabled for the system are available.	Talent Pools	Members
Email	Email address associated with the pool member.	Talent Pools	Members
Event	The type of action that occurred.	Talent Pools	History
Job Title	The job title of the pool member. External candidates do not have this value.	Talent Pools	Members
Name	Full name of the pool member.	Talent Pools	Talent Pools, Members
Name	Name of the pool.	Talent Pools	Details
Open Advanced Search	This displays the Talent Pools Advanced Search window, which enables you to search for potential pool members using customizable fields.	Talent Pools	Members
Owner	By default, this is also the creator of the talent pool.	Talent Pools	Details
Pool Context	Indicates the purpose of the pool. Position indicates the pool is for creating a succession plan for a specific position. Job Role is also for succession planning, but includes all positions related to that role. None leaves the pool unassociated.	Talent Pools	Details
Potential	Indicates the potential of an employee.	Talent Pools	Members
Review Rating	Indicates how the employee performed according to their last closed focal review.	Talent Pools	Members
Risk of Loss	Indicates the probable risk level of the employee leaving the organization.	Talent Pools	Members
Show Process History	Each time development activities are added to a pool member, an entry is added here indicating the process of the activity.	Talent Pools	Talent Pools

Field	Description	Applicable to	Header
Type	A blue icon indicates an internal employee and a green icon indicates an external candidate. Only employees can have activities assigned to them and have review rating, risk of loss, and potential values.	Talent Pools	Members
Users	Users collaborate and work on the pool, such as adding pool members and working with matrices.	Talent Pools	Talent Pools, Details

