Oracle Taleo Enterprise Edition

Implementing Performance

21A

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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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Oracle customers that have purchased support have access to electronic support through My Oracle Support. For information, visit *My Oracle Support* or visit *Accessible Oracle Support* if you are hearing impaired.

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Please give us feedback about Oracle Applications Help and guides! You can send an e-mail to: *talent_acquisition_doc_feedback_ww_grp@oracle.com*.

1 Getting Started

Taleo Performance Administration Basics

Navigation Bar

The auxiliary navigation bar gives access to various information such as setup configuration, online help, customer support, and product version. This bar also contains the Sign out option.

Breadcrumb Trail

The breadcrumb trail located at the top of each page allows you to see where you are located within the application and to jump to previously viewed pages. The breadcrumb trail is only available in navigation mode; it disappears when you are in editing mode. You can also select the Configuration link in the navigation ribbon to return to the top level of the Configuration Module.

Employee Center Configuration

Administrators are able to customize the layout and look of the Performance Management landing page, the Employee Center, using newly available widgets.

Customers can choose to display or hide the following four widgets on the Employee Center:

- Instructions - this widget uses a rich text editor to allow customers to easily enter special announcements, instructions, links to internal portal or graphics or other custom employee resources.
- My Tasks
- My Goal Plan
- My Network

The ability to select what is displayed on the Employee Center provides users with a streamlined and customized landing page that displays only widgets and information that is relevant to each customer's implementation. For example, if a customer is not implementing the Goal Plan module, Administrators can disable that widget and it will not display in the Employee Center. The system dynamically optimizes the real estate of the full page by expanding the widgets that are selected.

Configuration

Settings	
Name	**Location**
Employee Center Configuration	**Performance (Configuration) > [Performance] > Administration > [Employee Management] > Employee Center Configuration**

Currently there is one instruction widget per zone. This is not customizable by OLF.

Recently Viewed Items

The Recently Viewed Items pane contains direct links to the last ten pages you most recently accessed (according to your permissions) during the current session or previous ones. They can be pages where you made modifications or simply pages that you accessed without making modifications. To access a recently viewed item, simply click the item.

More Info

Whenever a description is available below a page title, the More info link is displayed. This link gives you access to contextual online help. A More link is also available whenever a listing of elements is not completely displayed. In such a case, clicking on More will provide all the information.

History

The History section is used throughout Performance to present useful tracking details on an element. The three most recent events are displayed in the History section. To view a more complete listing of events, click More.

The History section contains the following information.

- By: The “actor” (person or system) who performed the event. To obtain basic information about the “actor”, click the actor's name.
- Date and Time: Date and time when an event occurred.
- Details: Information regarding the event.
- Event: The event or action performed on an element.

Languages

Oracle Taleo Enterprise Edition products are available in different optional languages.

Not all languages are available for all Oracle Taleo Enterprise Edition products and languages must be activated by the system administrator before they can be used in an application.

The preferred language of a user is set in the user's account by the system administrator. The preferred language is used by the system as the default content language which is the same across all Oracle Taleo Enterprise Edition products. If a product does not support the same set of content languages, it will have its own preference configuration.

In Oracle Taleo Enterprise Edition applications, the languages in which an item is available are indicated in the Languages field. When creating or editing an item, the user can choose the base language as well as the languages in which an item will be available. The base language of an item is the item's reference language, usually used as a reference for other languages or fallback display in list mode. The user's preferred language is used as the default base language when the user creates an item. The base language of an item can be changed at any time by the user. A language must be activated before it can be designated as a base language.

When multiple languages are used for an item, the Earth icon is displayed. Hovering the mouse over the icon displays the languages activated for the item. When only one language is used for an item, the name of the language is displayed. When only one language is used in a company, there is no special indicator.

Language Settings

The following settings and preferences are used to configure languages.

Setting	Description	Default Value	Location
Application Languages	List of application languages, presented according to the organization's preferences. The application language is the language in which a product can be viewed. This is a private setting. Contact Oracle Support for details.	French, English, German, Spanish	Configuration > [General Configuration] Settings
Correspondence Language	Indicates the correspondence language.		Configuration > [General Configuration] Settings
Content Language	Indicates the content language.		Configuration > [General Configuration] Settings

Preference	Description	Location
Application Language	Allows users who log in using Single Sign-on to change their application language.	Configuration > [SmartOrg] Administration > [Users] User Accounts > General Preferences Recruiting Center > Resources > My Setup
Correspondence Language	Indicates the preferred correspondence language of a user.	Configuration > [SmartOrg] Administration > [Users] User Accounts > General Preferences Recruiting Center > Resources > My Setup
Content Language	Indicates the preferred content language of a user.	Configuration > [SmartOrg] Administration > [Users] User Accounts > General Preferences Recruiting Center > Resources > My Setup

Element Language Configuration

Language configuration is used throughout the Administration module. It allows you to create elements in several languages. Only languages that are activated appear in the Language list.

Field	Description	Applicable to	Header
Configure	Opens the Language Configuration page on which you can set the base language (default) as well as whether a language is Draft, Not Used or Active.	Language list	Language Configuration
Deactivate	Deactivates the selected language.	Language list	Language Configuration
Language	Displays the base language for the element as well as all other activated languages. The element must be defined in all activated languages.	Entity/Element	Language Configuration
Refresh	Updates the current window by displaying the information in the selected language.	Language list	Language Configuration

Supported Languages

The languages supported for Oracle Taleo Enterprise Edition products as well as specific features are listed below. For details regarding language availability for Oracle Learn Cloud and Oracle Taleo Business Edition, see the documentation for those products.

- Scheduling Center: All listed languages are supported except Portuguese (Portugal).
- Assessment: All listed languages are supported except Indonesian (Bahasa).
- OBIEE: All listed languages are supported except Indonesian (Bahasa), Lithuanian, Malaysian (Malay), Serbian, Slovenian.
- Resume Parsing: Resume parsing is delivered using a third party partner service. The functionalities are deliveredas is. Customers needing additional or different resume parsing capabilities should explore partner services.

Language	Locale	Recruiting and Onboarding	Performance	Mobile	Sourcing	Resume Parsing
Bulgarian	bg	Available	Available			
Chinese (China)	zh_CN	Available	Available	Available	Available	
Chinese (Taiwan)	zh_TW	Available	Available	Available	Available	
Croatian	hr	Available	Available			
Czech	cs	Available	Available		Available	
Danish	da	Available	Available			
Dutch	nl	Available	Available	Available	Available	Limited
English	en	Available	Available	Available	Available	Supported

Language	Locale	Recruiting and Onboarding	Performance	Mobile	Sourcing	Resume Parsing
English (U.K.)	en_GB	Available	Available	Available	Available	Supported
Finnish	fi	Available	Available		Available	
French (Canada)	fr	Available	Available	Available		Limited
French (France)	fr_FR	Available	Available	Available	Available	Limited
German	de	Available	Available	Available	Available	Limited
Greek	el	Available	Available			
Hungarian	hu	Available	Available		Available	
Italian	it	Available	Available	Available	Available	Limited
Indonesian (Bahasa)*	in	Available	Available	Available		
Japanese	ja	Available	Available	Available	Available	
Korean	ko	Available	Available	Available	Available	
Lithuanian*	lt	Available	Available			
Malaysian (Malay)*	ms	Available	Available			
Norwegian	no	Available	Available		Available	
Polish	pl	Available	Available	Available	Available	
Portuguese (Brazil)	pt_BR	Available	Available	Available	Available	Limited
Portuguese (Portugal)*	pt	Available	Available		Available	
Romanian	ro	Available	Available		Available	
Russian	ru	Available	Available	Available	Available	
Serbian*	sr (sh)	Available	Available			
Slovak	sk	Available	Available		Available	
Slovenian*	sl	Available	Available			
Spanish (Worldwide)	es	Available	Available	Available	Available	Limited
Swedish	sv	Available	Available	Available	Available	
Thai	th	Available	Available		Available	
Turkish	tr	Available	Available		Available	

Selector Windows

Selector windows are used throughout the application. They allow you to select various elements (values) according to where you are in the application. The type of selector window (single or multiple) varies. Selector windows contains filters allowing you to quickly find items in a list.

Selection Lists

Selection Lists are a type of field also referred to as dropdown lists, or selectors. They provide a list of valid values for filling in a field. Some Global selection lists are delivered pre-defined so they can be used across Taleo products. Customers can also create Performance-specific selection lists for use in creating user-defined fields in the application.

Global Selection List

A global selection list is a list of elements (values) used to define a field, that can be used by several Taleo products and that can only be viewed and edited.

These global selection lists are available in the Configuration menu, under Selection Lists:

- Education Levels
- Employee Statuses
- Job Levels
- Job Types
- Schedules
- Shifts
- Travels
- Currency

Global selection lists can be edited, that is system-defined items can be added or removed. Users will only see the items selected by the system administrator.

Performance Selection List

A Performance selection list is a list of elements (values) used to define a field, that can be used to create a user-defined field (UDF) in Performance. Performance selection lists can be can be viewed, edited, and created at **Configuration [Performance] Selection Lists**. They can be used in several modules of Performance: such as Performance Reviews, Goal Plans, Development Plans, and the Employee Information section of the Talent Profile.

Configuration

Setting	
Name	**Location**
Global Selection Lists	Configuration > Selection Lists
Performance Selection Lists	Configuration > [Performance] Selection Lists

Rich Text Editor

The Rich Text Editor enables users to edit and format text contained in competency definitions, correspondence, requisitions, requisition templates and review forms (definitions, sections and section items). Text formatted with the editor is presented to users in the TE applications with the specific formatting defined in the editor.

The Rich Text Editor contains standard text processing tools such as:

- cut, copy, and paste functions
- font types and sizes
- bold, italics, and underline
- text and background color
- left, right, and center alignment
- numbered and bulleted lists
- spell checker

Image or Link Insertion

Image or link insertion may only be available via the enlarged view of the editor, accessible when you first click the Enlarged View icon.

Spell Checker

The spell checker uses the application language, not the content language. The spell checker is available in several languages.

Internet Explorer 8

Users on Internet Explorer 8 may experience issues with the toolbar icons operating as expected. Users who experience this issue may either try viewing the page in Compatibility Mode, or use the Rich Text Editor in another browser such as another version of Internet Explorer or Firefox.

Copying and Pasting Text

When copying content from MS Word and pasting it in the Rich Text Editor tool, some reformatting may be required due to the complexities of mapping MS Word formatting to the Rich Text Editor. Capabilities supported by the Rich Text Editor tool are presented in the following table.

Item	Description
Bold	Full support for the bold style.
Italic	Full support for the italic style.
Underline	Full support for the underline style.
Heading styles and fonts	Heading styles as well as fonts used in heading styles are preserved. Fonts not used in heading styles are treated as a default normal style.
Font name (font face)	Font names (font faces) are generally preserved, even those that are not part of the Rich Text Editor's natively supported fonts (Arial, Comic Sans MS, Courier New, Tahoma, Times New Roman, Verdana).

Item	Description
Font size	The Rich Text Editor supports seven sizes. A "best guess" font size conversion is done by the system. Conversion of font sizes may not be accurate in some unspecified cases (depending on browser, MS Word version, etc.).
Text color	Full support for text color.
Text background color	Full support for text background color.
Hyperlinks	Full support for hyperlinks.
Bulleted and numbered lists	Lists should be created using the bullets, numbering and multilevel list features in MS Word. List types that do not conform to the recommended practice are not supported. The bullet type is preserved (bullet or number), but the symbol (circle, square, etc.) or notation (number, roman numerals, alphabetical) will be replaced by the browser's defaults. Numbering continuation between two distinct numbered lists is not supported. The color of the bullet is not preserved. Spacing around list blocks is browser-specific. Indentation level is preserved if made using the indent buttons. Custom indentations made using the MS Word ruler is not supported.
Line spacing	No line spacing information is preserved. All custom line spacing is converted to a single line. The only exceptions are: • Headings: the line spacing is browser-specific. • Lists: line spacing is browser-specific.
Images	Images are not supported and will not be included.
Tables	Table row and column dimensions are preserved. The presence or absence of borders is preserved. Colors are not preserved, default is black. Background and border colors are not preserved. Styles are not preserved, default is solid line. Custom widths are not preserved, default is 1px. Custom table and cell widths are converted to their pixel / percent equivalent. This conversion runs differently, based on the browser being used. This may result in discrepancies from the original table. Merged cells are preserved.

Recommended Practices for Constructing MS Word Documents to Minimize Reformatting Required When Pasting Content Into the Rich Text Editor

In general, the less complex the MS Word document is, the less reformatting a user will need to do when copying content from MS Word and pasting it in the Rich Text Editor. Below are some recommendations for creating MS Word templates.

Use the more common fonts that come with MS Word, such as:

- Arial
- Times New Roman

- Courier New
- Verdana
- Comic MS Sans

Avoid using images in the MS Word template documents, as they are not supported in the Rich Text Editor.

Avoid using the horizontal ruler to customize indent lines, as this type of formatting is not supported in the Rich Text Editor. Use the standard indent buttons.

Minimize the use of custom line spacing, as this is not supported in the Rich Text Editor.

Avoid using colored bullets in the MS Word template documents, as they are not supported in the Rich Text Editor.

Avoid using custom ruler indentation on bullets, as custom indentation on bullets is not supported in the Rich Text Editor. Use standard indent buttons.

Avoid mixing bullet types in the MS Word template documents, as mixed bullet types are not supported in the Rich Text Editor.

Create lists using the standard bullet types, numbering, multilevel list and indent features available in MS Word.

Session Timeout Notification Process

A session timeout notification process is used throughout all applications to inform users that the session is about to end and to remind users to save any desired information before the timeout delay is over.

When the application has been idle for 30 minutes, a pop-up window notifies the user that the application requires attention.

When the user accesses this application, a pop-up window lets him reset the application and indicates the remaining time before the session expires. If the user does not reset the application within the defined delay, the user is signed out of the application and will need to sign in again.

Taleo Regional Settings

Regional Settings

Regional settings are used to configure settings which control the number, date, currency, and language formats for a locale.

In the Regional Settings page, the Identifier list varies according to languages activated in the Oracle Taleo Enterprise Edition products. For example, if an organization only supports English (en) and French (fr), the Identifier list will contain en and fr as well as all specific locale identifiers related to fr and en, that is, fr-FR, fr-CA, en-GB, en-Au, etc.

The regional settings of a locale consist of four elements:

- Number: Defines the decimal symbol, digit grouping, maximum number of decimals, negative number format, etc.

- Currency: Defines the decimal symbol used for currencies, the default currency, the maximum number of decimals for currencies, etc.
- Date: Defines the date format used in the application. A date can be represented by text, number or a combination of both.
- Language: With each locale, comes a set of predefined values that are specific to the specified language, regardless of the country or region.

Configuring the Number Format

Configuration > **[SmartOrg] Administration** > **Regional Settings**

1. Click the name of an identifier.
2. Click Edit next to Number.
3. Select a value for each setting.
4. Click Done.

Configuring the Currency

Configuration > **[SmartOrg] Administration** > **Regional Settings**

1. Click the name of an identifier.
2. Click Edit next to Currency.
3. Select the values for each setting.
4. Click Done.

Configuring the Date Format

Configuration > **[SmartOrg] Administration** > **Regional Settings**

1. Click the name of an identifier.
2. Click Edit next to Date.
3. Select a value for each setting. See *Date Format Properties*.
4. Click Done.

Date Format Properties

Date Format	Description
Full date format	Date represented by the day of the week, month, date and year. Default is EEEE, MMMM D, YYYY. Maximum number of characters: 255.
Long date format	Date represented by month, date and year. Default is MMMM D, YYYY. Maximum number of characters: 255.
Medium date format	Date represented by date, month and/or year. Default is D-MMM-YYYY. Maximum number of characters: 255. In the case of regions that do not use commas, periods or slashes with dates, an additional format is included that is specific to the region. When no date format is selected, the medium format is the default format used by the application.
Short date format	Date represented by date, month and/or year. Default is DD/MM/YY. Short date formats are used for lists and calendars. Numeric values only.
Shortest date format	Date represented by date and month. Default is DMMM. Shortest date format are used in candidate files and other lists that include many columns.

Date Format Details	Description
Text	A date element that always appears in the form of text, such as days of the week, will be displayed in long form if four letters are used for its representation. If less than four letters are used, the date element will appear in an abbreviated form. For example, configuring a date format using "EEE" would produce "Fri" for Friday, while using "EEEE" would produce the long form "Friday".
Numbers	The system adds zeros to single numbers in certain cases. For example, if the date element "DD" is part of the date format, the ninth day of the month will be displayed with a leading zero, thus, "09". If the date element is "D", however, the system will display "9" without a leading zero.
Text and Numbers	When the date format element is composed of one or two characters, a numeric value results. For example, if the date format element is "M" or "MM", the month of February will be depicted as "2" and "02" respectively. On the other hand, a date format element made up of three or more characters will result in a textual representation of the date: in the case of "MMM", February will appear as "FEB", if "MMMM" is used, February will be displayed as "February".

Date Format Syntax	Meaning	Presentation	Example (US locale)
Y	Year	Numeric	2009
M	Month of the year	Alphanumeric	July, Jul. or 07
D	Day of the month	Numeric	10
H	Hour AM/PM (1-12)	Numeric	12
h	Hour of the day (0-23)	Numeric	22
m	Minute of the hour	Numeric	38
s	Seconds	Numeric	59
E	Day of the week	Textual	Tue, Tuesday
a	AM/PM marker	Textual	PM
K	Hour in AM/PM (0-11)	Numeric	0
‘	Escape for text	Delimiter	‘
“	Single quotation mark (twice the escape character)	Literal	

Selecting a Preferred Locale

More than one locale must be available.

Configuration > **[SmartOrg] Administration** > **[SmartOrg] Regional Settings**

1. Click the name of a locale identifier.
2. Click the General tab.
3. Select a value.
4. Click Done.

The selected locale is displayed by default when more than one locale is available.

Taleo Performance Setting Management

Taleo Performance Product Settings

The following table lists all product settings that are related to Performance. Most settings are found under **Configuration** > **[Taleo Performance] Administration** > **[Global Configurations] Settings** . When found under a different product or section, the full path is indicated.

There are different types of product setting security levels:

- Public - are viewable and editable by customers.
- Protected - are viewable by customers but only editable by Taleo staff (specifically users with a 'support' role).
- Private - are viewable and editable only by Taleo staff (specifically users with a 'support' role).

Setting Name	Setting Description	Possible Values	Security Level	Setting Category
Candidate Search Contextualization	Applies the search restrictions as defined on the user groups. Enabling this setting will determine if candidate searches are restricted to user groups visibility property.	• Yes • No (default)	Public	Advanced Search
Employee Search Contextualization Configuration	Applies the search restrictions as defined for the user groups. Enabling this setting will determine if searches are restricted to the user groups visibility property.	• Yes • No (default)	Public	Advanced Search
Maximum Number of Results for Advanced Search	Indicates the maximum number of items to appear in the advanced searches.	• 500 (default)	Private	Advanced Search
Maximum Number of Results for Basic Search	Indicates the maximum number of items to appear in the basic searches.	• 500 (default)	Private	Advanced Search
Maximum Number of Results for Best Fit	Indicates the maximum number of items to appear in the best fit searches.	• 500 (default)	Private	Advanced Search
Working Days	Indicates the days of the week that are considered working days. This setting serves to calculate the duration-based deadlines of review tasks. This setting is shared with the setting of the same name in Taleo Onboarding. Changing	• Any day of the week • Default is Monday, Tuesday, Wednesday, Thursday, Friday	Public	Calendar

Setting Name	Setting Description	Possible Values	Security Level	Setting Category
	the setting in either place, affects both products.			
Enable Career Management	Enables Career Management functionality in the application.	• Yes • No (default)	Protected	Career Management
Maximum Number of Career Steps	Determines the maximum number of steps within a scenario.	• 5 (default)	Public	Career Management
Maximum Number of Scenarios	Determines the maximum number of scenarios allowed for an employee.	• 3 (default)	Public	Career Management
Job Certifications Advanced Search Field Configuration	Indicates if the job certification criteria is available in the Advanced Search.	• Yes (default) • No	Public	Career Management Search
Job Competencies Advanced Search Field Configuration	Indicates if the job competency criteria is available in the Advanced Search.	• Yes (default) • No	Public	Career Management Search
Job Field Advanced Search Field Configuration	Indicates if the job field criteria is available in the Advanced Search.	• Yes (default) • No	Public	Career Management Search
Job Level Advanced Search Field Configuration	Indicates if the job level criteria is available in the Advanced Search.	• Yes (default) • No	Public	Career Management Search
Other Competencies in Advanced Search Field Configuration	Indicates if the section "Other Competencies" is available in the advanced search.	• Yes (default) • No	Public	Career Management Search
Enable Competency Context Management	Enables the use of competency contexts for competencies. A competency context provides the ability to define a specific context in which a competency is available so that only employees who work for those specified organizations, locations and/or job fields are able to view.	• Yes • No (default)	Public	Competency Management, under **Configuration** > **[General Configuration] Settings**
Activity Category Criterion In Advanced Search	Indicates whether the "Activity Category" criterion is available in the development activity advanced search.	• Yes (default) • No	Public	Development Activity Search
Activity Name Criterion in Advanced Search	Indicates whether the "Activity Name" criterion is available in the development activity advanced search.	• Yes (default) • No	Public	Development Activity Search

Setting Name	Setting Description	Possible Values	Security Level	Setting Category
Competency Criterion In Advanced Search	Indicates whether the "Competency" criterion is available in the development activity advanced search.	• Yes (default) • No	Public	Development Activity Search
Enable Development Activity Advanced Search	Indicates if the Advanced Search feature for development activity is available.	• Yes (default) • No	Public	Development Activity Search
Job Field Criterion In Advanced Search	Indicates whether the "Job Field" criterion is available in the development activity advanced search.	• Yes (default) • No	Public	Development Activity Search
Job Level Criterion In Advanced Search	Indicates whether the "Job Level" criterion is available in the development activity advanced search.	• Yes (default) • No	Public	Development Activity Search
Job Role Criterion In Advanced Search	Indicates whether the "Job Role" criterion is available in the development activity advanced search.	• Yes (default) • No	Public	Development Activity Search
Location Criterion In Advanced Search	Indicates whether the "Location" criterion is available in the development activity advanced search.	• Yes (default) • No	Public	Development Activity Search
Employee Job Role Advanced Search Field Configuration	Indicates if the Employee Job Role field is available as an option for advanced search.	• Yes (default) • No	Private	Person Search
Organization Criterion In Advanced Search	Indicates whether the "Organization" criterion is available in the development activity advanced search.	• Yes (default) • No	Public	Development Activity Search
Development Activity Sharing	Allows users to share their custom development activities either at the time of archiving or once the activity is archived. This setting applies only if the Enable Activity Sharing setting is set to Yes.	• Yes (default) - - Sharing the activity is possible when archiving the activity or once the activity is archived. • No - Sharing the activity is only possible once the activity has been archived.	Public	Development Planning
Development Activity Assignment Limit	Determines the maximum number of employees to whom a development activity can be assigned at one time.	• 10 (default)	Public	Development Planning

Setting Name	Setting Description	Possible Values	Security Level	Setting Category
Development Activity Average Rating Computation Delay	Indicates time in minutes allowed before the development activity average rating is computed.	• 5 (default)	Protected	Development Planning
Development Activity Rating Mandatory	Forces users to provide a rating when archiving development activities.	• Yes (default) • No	Public	Development Planning
Development Activity Sharing With Any Employees	Allows users to share their custom development activities with any employees in the organization.	• Yes (default) • No	Public	Development Planning
Development Activity Sharing With Direct Reports and Peers	Allows managers to share their custom development activities with their direct reports and peers.	• Yes (default) • No	Public	Development Planning
Development Activity Sharing With Network People	Allows users to share their custom development activities with people in their network including tag filters.	• Yes (default) • No	Public	Development Planning
Development Planning Default Approval Request Duration	Determines the default number of days before the development planning approval request is considered late.	• 1 (default)	Public	Development Planning
Enable Activity Sharing	Allows users to share their custom development activities.	• Yes (default) • No	Public	Development Planning
Enable Custom Contexts Managing	Indicates if users can create user-defined contexts.	• Yes (default) • No	Public	Development Planning
Enable Development Activity Rating	Allows users to rate development activities after archiving them.	• Yes (default) • No	Public	Development Planning
Enable Development Activity Recommendation	Allows users to recommend development activities.	• Yes (default) • No	Public	Development Planning
Enable Development Planning	Enables Development Planning functionality in the application.	• Yes • No (default)	Public	Development Planning
Enable Development Plan Printing	Enables the development plan printing feature in the application.	• Yes • No (default)	Private	Development Planning
Maximum Number of Activities Recommended	Determines the maximum number of activities recommended to an employee.	• 10 (default)	Public	Development Planning

Setting Name	Setting Description	Possible Values	Security Level	Setting Category
Maximum Number of Context Items per Development Activity	Determines the maximum number of context items that a user can select when linking an activity.	• 5 (default)	Protected	Development Planning
Maximum Number of Items per Development Activity Context	Determines the maximum number of items per context (O, L, F, etc.) when managing development activities.	• 1 (default)	Protected	Development Planning
Number of Most Relevant Activities Displayed in Search	Determines the default number of most relevant activities displayed in the activity search. This setting determines the number of top rated activities displayed by default when the search result grid first displays, so that the list does not open empty.	• 5 (default)	Public	Development Planning
Display Employee Metrics	Determines if the employee metrics will be shown on the back side of the performance cards.	• Yes (default) • No	Public	Global Settings
Employee Metrics User-Defined Fields Search Configuration	Manages the Employee Metrics UDFs used in Advanced Search and filters within the Talent Browser and Talent Pools.			Global Settings **Performance Configuration > [Performance] > Administration > [Employee Management]**
Employee User-Defined Fields Search Configuration	Manages the Employee UDFs used in Advanced Search and filters within the Talent Browser and Talent Pools.			Global Settings **Performance Configuration > [Performance] > Administration > [Employee Management]**
Enable LinkedIn Integration	Used to enable LinkedIn Integration for the Talent Profile Properties configuration; and the Work Experience, Education and Certification sections of the Talent Profile.	• Yes • No (default)	Protected	Global Settings
Enable Spell Checker	Indicates if the Spell Checker functionality is available.	• Yes (default) • No	Public	Global Settings
Enable Talent Profile	Indicates if the Talent Profile page is displayed.	• Yes (default) • No	Public	Global Settings
Supporting Tools Displayed by Default	Controls the display of the Supporting Tools window in all sections of Performance	• Yes • No (default)	Public	Global Settings

Setting Name	Setting Description	Possible Values	Security Level	Setting Category
	in which it appears. When set to Yes the setting makes the Supporting Tools window open (or expanded) by default. When set to No the setting makes the window closed (or collapsed) by default. No is the initial default value for this setting when the application is first opened. In either case the window includes its own expand/ collapse button that allows you to open or close it as needed.			
Feedback Requests Use Ratings	Determines if the 5-star rating scale is displayed in feedback requests.	• Never • Always (default) • Ask user - an additional option is shown on the Request Feedback form for the user to specify whether to allow or not the target recipients to provide rating information as part of the feedback	Public	Feedback
Enable Feedback Approval	This setting enables feedback approval and controls if the approver selector and details are displayed. It also controls the activation of the approval workflow mechanism. Also when set to yes, the Status column is available in the Sent view of the Feedback Journal.	• Yes • No (default)	Public	Feedback
Enable Public Access to Feedback	The feedbacks a user can see depend on this setting. When Private feedback is enabled the user sees feedback entries only when they are the author or recipient of the feedback. When public feedback is enabled, the user also sees all feedback provided about themselves or their direct reports.	• Yes • No (default)	Public	Feedback
Allow Feedback Deletion	Indicates whether it will be possible for the user to remove feedback entries from the feedback journal or not.	• Yes (default) • No	Public	Feedback

Setting Name	Setting Description	Possible Values	Security Level	Setting Category
HR Administration Maximum Items	Number of items displayed in the HR Administration framework.	• 1000	Private	Global Settings
Sender Email Address	Default email address used in the system-generated emails sent to the Performance users.	• Any email address	Public	Global Settings
Sender Email Address Alias	Name assigned to the email sender. Aliases are multilingual, but if no value is provided in a given language, the English value is used by default.	• Any name • English (Default): Human Resources. French: Resources Humaines. French (France): Resources Humaines.	Public	Global Settings
Show Job Role Name or User Title	Indicates whether it is the job role name or the user title that is used as the employee's title in the application.	• Job Role Name (default) • User Title	Public	Global Settings
Enable Job Position to Override Job Role or Job Title	For implementations using Position Management, use to indicate whether or not to use Job Position to override the Job Role or User Title in applicable areas of the application. (This is a setting introduced in Feature Pack 13B.)	• Default value is Yes (true). Allows the job position to override the job role and user title in the application. • No (false) removes the job position override of the other values. Either the job role or job title is displayed based on the setting **Show Job Role Name or User Title.**	Public	Global Settings
Talent Profile Competency Grouping	Indicates how competencies are to be grouped on the Talent Profile, that is by type or by group.	• By Competency Type (default) • By Competency Group	Public	Global Settings
Timeout Maximum Inactive Interval	Maximum inactive interval, in milliseconds, for a user logged in.	• 1800000 (default)	Private	Global Settings
Timeout Maximum Ping Number	Number of unreceived pings before the session is terminated.	• 2 (default)	Private	Global Settings
Timeout Ping Frequency	Frequency of pings in milliseconds.	• 300000 (default)	Private	Global Settings
Timeout Reminder Delay	Time in milliseconds before session timeout reminder is displayed.	• 300000 (default)	Private	Global Settings
Business Goal Default Measurement Type	Indicates the default “Measurement Type” field	• Qualitative	Public	Goals Management

Setting Name	Setting Description	Possible Values	Security Level	Setting Category
	value when creating a business goal.	• Quantitative (default)		
Editable Business Goal Actual Value	Indicates if the "Quantitative Actual Value" field is editable by the end user. This field could be blocked from being modified if, for example, it is populated by an external system.	• Yes • No (default)	Public	Goals Management
Employee Goal Default Update Delay	Indicates the default "Update Delay" field value (in days) when creating an employee goal When the specified delay is expired, a Late icon is shown in the list of employee goals.	• 5 (default)	Public	Goals Management
Enable Business Goal Management	Enable business goal management. When enables, employee goals can be aligned to business goals.	• Yes • No (default)	Protected	Goals Management
Enable Business Project Management	Enable business project management within business goal management. Allows employee goals to be aligned on projects. Allows managers to manage projects (My Projects section). If the setting is to be deactivated but there are already employee goals aligned to projects, employee goals will continue displaying the business goal alignments as well as project alignments.	• Yes • No (default)	Protected	Goals Management
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.	• Yes • No (default)	Protected	Goals Management
Goals Management Default Approval Request Duration	Determines the default number of days before the goal approval request is considered late.	• 1 (default)	Public	Goals Management
Organization Content Languages	List of content languages available in the application, presented according to the organization's preferences.	• English (default)	Private	Languages

Setting Name	Setting Description	Possible Values	Security Level	Setting Category
Organization Content Locales	The locales used to manage content in the application that are not covered by the setting "Organization Content Languages", like the custom text in career section, which can be overwritten by activated locales.	• No default	Private	Languages
Preferred Language Display Activation	Indicates if the "Language of Correspondence" is displayed or not in the "Preferences" of the user setup in User Management or in My Setup.	• Yes (default) • No	Private	Languages
Allow Mentor to Break Mentoring	Allows mentors to break the mentoring relationship with mentees.	• Yes (default) • No	Public	**Mentoring**
Employee Goals Accessible To Mentors	Enables mentors to see their mentees' employee goals and goal plan.	• Yes • No (default)	Private	**Mentoring**
Enable Mentoring	Indicates if the mentoring functionality is available.	• Yes • No (default)	Public	**Mentoring**
Maximum Mentees Per Mentor	Indicates the maximum number of mentees a mentor can have. There is no hardcoded limit, but it is recommended to not exceed 10.	• 5 (default)	Public	**Mentoring**
Review Accessible To Mentors	Enables mentors to see their mentees' performance review.	• Yes • No (default)	Private	**Mentoring**
Cancel Pending Multi-Rater Requests On Transfer	Cancel pending multi-rater requests when transferring reviews.	• Never • Always (default) • Ask user	Public	Performance Management
Delete Manager's Ratings And Comments On Transfer	Delete the manager's ratings and comments when transferring reviews.	• Never • Always (default) • Ask user	Public	Performance Management
Display Current Review Status	Determines if the current review status will be shown in the Review section on the back side of the performance cards. When displayed, it corresponds to the rating of the most recent assigned review. The most recent review is based on the date of the manager assignment. In the event	• Yes (default) • No	Public	Performance Management

Setting Name	Setting Description	Possible Values	Security Level	Setting Category
	that two reviews have the same manager assignment date, the most recent is determined as follows: • based on the review period end date, • then based on the review period start date, • and then based on the review generation time/date stamp.			
Effective Date Of Last Review	Indicates the effective date to be used for the last review. The purpose of this setting is to calculate what the most recent review is. The most recent review score can then be copied from the Historical Review table to the Employee Metrics table and displayed in the Talent Profile and on the Talent Cards throughout the application.	• **Review Cycle End Date** • **Review Request Period End Date** • **Review Request Reference Date** • **Close Review Action Date** (default)	Public	Performance Management
Enable Performance Management	Enables Performance Management functionality in the application.	• Yes • No (default)	Protected	Performance Management
Enable Offline Review	Allows to activate or deactivate the offline review capabilities.	• Yes • No (default)	Private	Performance Management
Number Of Reviews For Performance Indicator Calculation	Indicates the number of last focal reviews used to calculate the performance indicator, displayed in the employee's succession plan.	• 1 (default)	Public	Performance Management
Rating	Rating	• Yes • No (default)	Private	Performance Management
Review Assignment Batch Commit	Number of reviews to be assigned and tasks created before a commit is performed within a single scheduled task.	• 20 (default)	Private	Performance Management
Review Assignment Batch Size	Number of reviews to be assigned in a single scheduled task before the next scheduled task.	• 250 (default)	Private	Performance Management
Review Generation Batch Commit	Number of reviews to be generated before a commit is performed within a single scheduled task. For	• 20 (default)	Private	Performance Management

Setting Name	Setting Description	Possible Values	Security Level	Setting Category
	example, among the 250 reviews to be generated within a scheduled task, proceed in bunches of 20 between each commit.			
Review Generation Batch Size	Number of reviews to be generated in a single scheduled task before the next scheduled task.	• 250 (default)	Private	Performance Management
Review User Interface Version 2	Determines if Performance Reviews use the Version 2 user interface which provides performance improvements.	• Yes • No (default)	Private	Performance Management
Default Successor Readiness Value For Matching	Default suggested readiness value (in number of days) when matching successors to an open requisition. 0 means ready now.	• 0 (default)	Public	Succession Planning
Enable Succession Matrix	Indicates if the succession matrix mode is enabled.	• Yes (default) • No	Public	Succession Planning
Enable Succession Planning	Enables Succession Planning functionality in the application.	• Yes • No (default)	Protected	Succession Planning
Maximum Number of Succession Plan Options	Determines the maximum number of options within a succession plan.	• 20 (default)	Public	Succession Planning
Maximum Number of Succession Pool Options	Determines the maximum number of options within a succession pool.	• 100 (default)	Public	Succession Planning
Succession Planning Default Approval Request Duration	Determines the default number of days before the succession approval request is considered late.	• 1 (default)	Public	Succession Planning
Enable Talent Pool	Enables the Talent Pool functionality in the application.	• Yes • No (default)	Private	Talent Pools
Enable Team Management	Enables Team Management features such as Employee Change Requests and Manager Self-Service.	• Yes • No (default)	Public	Team Management
Job Position Configuration	Behavior with the corresponding job position when moving an employee to another manager.	• Move also the job position if applicable • Leave job position to the current manager (default) • Prevent moving the employee	Public	Team Management

Setting Name	Setting Description	Possible Values	Security Level	Setting Category
Organizational Chart Pager Threshold	Indicates how many employee cards are displayed under a manager card before the pager mechanism is used in the organizational chart.	• 25 (default)	Public	Team Management
Team Management Default Approval Request Duration	Determines the default number of days before the team management approval request is considered late.	• 1 (default)	Public	Team Management
Matrix Management Enabled	Enables matrix management functionalities allowing a manager to delegate his tasks to another manager.	• Yes • No (default)	Public	Matrix Management under **Configuration** > **[SmartOrg] Settings**
Extended Matrix Management	Indicates if matrix manager relationships also apply to the direct reports of delegated employees.	• Yes • No (default)	Public	Matrix Management under **Configuration** > **[SmartOrg] Settings**
Maximum Number of Matrix Managers	Indicates the maximum number of matrix manager relationships that can be set for an employee.	• 5 (default)	Public	Matrix Management under **Configuration** > **[SmartOrg] Settings**
Maximum Number of Matrix Management Requests	Indicates the maximum number of matrix management requests a manager can have at the same time.	• 5 (default)	Public	Matrix Management under **Configuration** > **[SmartOrg] Settings**
Employee Change Matrix Management Behavior	Behavior Indicates how matrix manager relationships are handled when an employee changes manager.	• Keep matrix managers • Remove matrix managers (default)	Public	Matrix Management under **Configuration** > **[SmartOrg] Settings**
Enable DDI Integration	Enables DDI Integration to provide access to the Leadership Mirror system.	• Yes • No (default)	Private	Global Settings
DDI Integration – Leadership Mirror URL	Indicates the URL of the Leadership Mirror system.	https://lm.ddiworld.com	Private	Global Settings
DDI Integration – SSOSaltKey	Indicates the value of the SSOSaltKey, which is equal to the vkey of the company and is generated when the company is originally set up for Leadership Mirror. The passed username will be validated against the company identified by the vkey.	None	Private	Global Settings
DDI Integration – SSOSaltValue	The value of the SSOSaltValue is the secret key, which can be	None	Private	Global Settings

Setting Name	Setting Description	Possible Values	Security Level	Setting Category
	anything an organization specifies. The SSOSaltKey and SSOSaltValue must match in the client's setup for generating the Leadership Mirror URLs. As a multi-valued key, each value refers to a different company.			
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).	• Disabled (default) • Idle • Automatic	Public	Global Settings
Enable Global Accessibility	Enables global accessibility to activate accessibility features for all users.	• Yes • No (default)	Public	Global Settings
Autosave Interval	Indicates the amount of time between automatic saves.	• 2 minutes • 5 minutes (default) • 10 minutes • 20 minutes	Public	Global Settings
Number of Mentees Per Page	The maximum number of mentees that can be displayed on a single page in the mentoring center.	5 (default)	Public	Global Settings

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.

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.

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.

About the Use of Language Values in Configuration

On the Custom Help URL page, the list of language values displayed corresponds to the language(s) activated for a customer. The customer can create their own custom help in each language they've activated in Performance, and they can locate each language version on a separate URL page. They then configure the custom online help feature, for each applicable module, by entering their appropriate language specific URL(s) into the matching language value field(s). The result is the custom help displayed in the Supporting Tools pane will be the language version associated to the language that the user is currently logged in with.

If the customer chooses to display the standard online help rather than their own custom help, they can also configure the language display of the help presented for each module. On the Custom Help URL page, the list of Default URL Values displayed corresponds to the language(s) activated for a customer, as well as the section of the standard online help that documents the module. The customer copies the appropriate default url value(s) from the list, and pastes

them into the appropriate language fields above. The result is the standard help displayed in the Supporting Tools pane will be the language version associated to the language that the user is currently logged in with.

Configuration

The customizable, contextualized online help configuration settings are listed in the following table. These are located at the navigation **Configuration > [Taleo Performance] > Settings > [Product Settings] > [Refine By] Category = Help**. All are Public settings, meaning the administrator can configure them.

Setting Name	Description
Custom Help Business Goals URL	Indicates the target URL for the Business Goals custom help.
Custom Help Career Plan URL	Indicates the target URL for the Career Plan custom help.
Custom Help Development Plan URL	Indicates the target URL for the Development Plan custom help.
Custom Help Feedback Journal URL	Indicates the target URL for the Feedback Journal custom help.
Custom Help Goal Plan URL	Indicates the target URL for the Goal Plan custom help.
Custom Help Job Position Profile URL	Indicates the target URL for the Job Position Profile custom help.
Custom Help Mentoring Center URL	Indicates the target URL for the Mentoring Center custom help.
Custom Help My Projects URL	Indicates the target URL for the My Projects custom help.
Custom Help Performance Review URL	Indicates the target URL for the Performance Review custom help.
Custom Help Review Cycle Analytics URL	Indicates the target URL for the Review Cycle Analytics custom help.
Custom Help Succession Plan URL	Indicates the target URL for the Succession Plan custom help.
Custom Help Talent Browser URL	Indicates the target URL for the Talent Browser custom help.
Custom Help Talent Pools URL	Indicates the target URL for the Talent Pools custom help.
Custom Help Talent Profile URL	Indicates the target URL for the Talent Profile custom help.

Setting Name	Setting Description
Custom Help Business Goals Activation	Activate or deactivate the setting for the Business Goals custom help.
Custom Help Career Plan Activation	Activate or deactivate the setting for the Career Plan custom help.
Custom Help Development Plan Activation	Activate or deactivate the setting for the Development Plan custom help.
Custom Help Feedback Journal Activation	Activate or deactivate the setting for the Feedback Journal custom help.
Custom Help Goal Plan Activation	Activate or deactivate the setting for the Goal Plan custom help.
Custom Help Job Position Profile Activation	Activate or deactivate the setting for the Job Position Profile custom help.
Custom Help Mentoring Center Activation	Activate or deactivate the setting for the Mentoring Center custom help.
Custom Help My Projects Activation	Activate or deactivate the setting for the My Projects custom help.

Setting Name	Setting Description
Custom Help Performance Review Activation	Activate or deactivate the setting for the Performance Review custom help.
Custom Help Review Cycle Analytics Activation	Activate or deactivate the setting for the Review Cycle Analytics custom help.
Custom Help Succession Plan Activation	Activate or deactivate the setting for the Succession Plan custom help.
Custom Help Talent Browser Activation	Activate or deactivate the setting for the Talent Browser custom help.
Custom Help Talent Pools Activation	Activate or deactivate the setting for the Talent Pools custom help.
Custom Help Talent Profile Activation	Activate or deactivate the setting for the Talent Profile custom help.

Note: The existing setting **Supporting Tools Displayed by Default** controls the display mode of the Supporting Tools pane on the right side of the screen. It is located at **Configuration [Taleo Performance] Administration [Global Configurations] Settings.** This is also a Public setting, meaning the administrator can configure it.

Configuring Custom Help Properties

You want to configure custom online help for the various modules and languages your organization has implemented in Performance.

Configuration > [Performance] Settings > [Product Settings]

1. Set the Refine By field to Category.
2. Set the field on the immediate right to Help, and click Refresh.

   The list of settings is reduced to 28 help-related settings. For each of 14 affected modules in Performance there are two settings each: Custom Help Activation and Custom Help URL.
3. Click the Custom Help Activation setting for the appropriate module.

   When the Custom Help Activation page opens, click Edit.
4. Set the Value to Yes or No.

   No=False, the help pane is deactivated and does not display in the Supporting Tools. Yes=True, the help pane is activated and displays in the Supporting Tools.
5. Click Save.
6. Return to Product Settings and repeat steps 3 through 5 for each module your organization has implemented in Performance and wants to display custom help for.

The Help pane in the Supporting Tools is activated for each of the modules your organization wants to display custom help for.

Configure the Custom Help URL settings for the same set of modules.

Configuring Custom Help URLs

You want to configure custom online help for the various modules and languages your organization has implemented in Performance.

Configuration > [Performance] Settings > [Product Settings]

1. Set the Refine By field to Category.
2. Set the field on the immediate right to Help, and click Refresh.

The list of settings is reduced to 28 help-related settings. For each of 14 affected modules in Performance there are two settings each: Custom Help Activation and Custom Help URL.

3. Click the Custom Help URL setting for the appropriate module.

   When the Custom Help URL page opens, click Edit.
4. You have the following options for configuring URLs for each appropriate language:
   - If there is no content to display or a language is not implemented, leave the field blank.
   - In the appropriate language field type in the URL for the web page hosting your own organization's custom content.
   - Or, to display content from the standard online help, copy the appropriate URL value for the appropriate language from the Default Value list, and paste it into appropriate language field.

   You can display either your own custom help content, or standard online help content, but not both.

   The standard online help content that will be displayed in the supporting tools pane is content from the Help Center, from a chapter relevant to the module you are configuring.
5. Click Save.
6. Return to Product Settings and repeat steps 3 through 5 for each module your organization has implemented in Performance and wants to display help for.

The Help pane in the Supporting Tools is now configured to display either no custom help, your organization's custom help content, or content from the standard online help.

Corporate Branding

The corporate branding offers administrators the ability to change the color theme and the company logo to be used throughout both Performance and Recruiting.

Corporate branding is configured in one single location and applies to all Taleo products together. In addition to the Oracle Fusion Skyros default theme, additional application themes are offered to better accommodate your corporate branding. The theme is set by the system administrator and once defined, is the same for all users of Performance and Recruiting.

Available Themes

On the Default Theme page these theme colors are available:

- **Oracle Fusion Skyros** - The Oracle Fusion Skyros theme is the default theme for new customers. Existing customers will keep their current theme, but have the possibility to change the default theme to Skyros in the product settings. The main difference from existing themes is the Skyros header, which is blue. Because of the blue header, organization logos that have a white background are not recommended for use with the new theme.
- **Taleo** - This is the traditional Taleo green look. It offers organizations a look that is both modern and bright.
- **Aqua** - This theme has light shades of blue, providing a bright yet tranquil look.
- **Sand** - This theme presents shades of brown and tan and will suit companies that want a more earth-toned feel.
- **Silver** - This theme presents shades of gray and corresponds to the most conservative theme available, aside from the Ice theme.
- **Ice** - This theme is similar to Aqua and offers a cool, tranquil look using shades of blue.

Company / Organization Logos

The product setting Overlay Organization Logo is available for use in conjunction with the Skyros theme. This setting only works with the Skyros theme. Logos with a transparent background are required for this setting. Transparent PNG's are supported and recommended. For the best user experience, recommended practice is the logo used with the Skyros theme should be a light color, preferably white, with a transparent background.

It is possible for organizations to use their own logo in place of the Oracle or Taleo logo to appear in the upper left-hand region of a page. To display properly, the downloaded logo image should satisfy the following criteria:

- When adding a company logo image, it must be properly sized in the application. It is displayed in the top left of each page in Taleo Enterprise. There can only be one static logo regardless of which modules are in use. The maximum image size is 280 x 40 pixels and smaller images should not be resized to equal the maximum, as this affects resolution and readability. The image must be horizontally aligned to the left and vertically aligned to center.
- As for the image format, it must be a .png file type.

Corporate Branding Default Settings

Setting Name	Default value at migration	Defaults value for new zone
Overlay Organization Logo	OverlayCompanyLogo.png	OverlayCompanyLogo.png
Default Theme	Current	Oracle Fusion Skyros

Configuration

The following configuration settings control corporate branding.

Setting Name	Description	Location
Default Theme	Provides the ability to view and edit the organizational display theme.	**Configuration** > **[General Configuration] Settings** > **[Category] User Preferences** > **Default Theme**
Organization Logo	Provides the organization logo displayed in the applications UI. Supported format for the logo is PNG, with maximum dimensions of 280 x 40 pixels.	**Configuration** > **[General Configuration] Settings** > **[Category] Corporate Branding** > **Organization Logo**
Overlay Organization Logo	Provides the organization logo displayed in the applications UI where a single color logo with transparent background is required. Supported format for the logo is PNG, with maximum dimensions of 280 x 40 pixels.	**Configuration** > **[General Configuration] Settings** > **[Category] Corporate Branding** > **Overlay Organization Logo**

Defining the Application Color Theme

Defining the application color theme allows the administrator to select the display color theme used throughout the user interface of Performance and Recruiting products.

Configuration > [General Configuration] Settings

1. In the Product Settings page set Refine By to Category, set the Category to User Preferences, and click Refresh.
2. In the results list select the *Default Theme* setting.

3. In the Default Theme page, click Edit next to the page title.
4. In the Editor page, select the desired theme in the Value section.

   By default, the Oracle Fusion Skyros theme is selected.

5. Click Save.

When next accessing the Performance user interface the selected theme will be applied. Note that the color theme setting is global and therefore is the same for all users and products.

Changing the Company Logo

Changing the company logo is done to either replace the Taleo logo that is shown by default, or to replace your company's logo that is already displayed with a new one.

The maximum space available to hold the company logo is 280 x 40 pixels.

The file type must be PNG.

Configuration > **[General Configuration] Settings**

1. In the Product Settings page set Refine By to Category, set Category to Corporate Branding, and click refresh.
2. In the results list select the *Organization Logo* setting.
3. In the Organization Logo page, click Edit next to the page title.
4. In the Editor page:
   - click Browse to find the image file of the logo you wish to use; or
   - click Remove the file if you want to remove the company logo used in order to re-apply the Taleo default logo.

   By default, the Taleo logo is used when no other logo is selected.

5. Click Save.

When next accessing the Performance user interface the selected logo will be displayed in the upper-left corner of the page, where the Taleo logo was previously shown. Note that the logo setting is global and therefore is the same for all users.

Spell Check

The spell check feature offers the ability to see misspelled words as you type comments in self-assessments, employee performance reviews and feedback request/response forms providing Rich Text Format and to select a replacement from a list of suggested words or accept the word as is.

When entering a comment, the misspelled words are indicated by a wavy red underline as you type and replacements are proposed in the right-click menu. When a misspelled word is accepted as is, it is added to the user's temporary library and will be saved for the current session only, which means that an accepted word in one session will be considered a mistake in another, unless it is accepted again and added to the temporary library for that session.

The language dictionary used to verify the spelling is automatically set to the selected application language. The currently supported languages for version 10 are da, de, en-uk, en-us, es, fi, fr, it, nl, no, pt, pt-br and sv (by default, en is en-us).

The spell check feature is enabled or disabled via the **Enable LinkedIn Integration** setting via **Configuration** > **[Taleo Performance] Settings** .

Enabling the Spell Check Feature

Enabling the spell check feature activates the related feature in Performance and gives the user the ability to see misspelled words as comments are typed and allows to select a replacement from a list of suggested words or to accept the word as is.

Configuration > **[Taleo Performance] Settings**

1. In the Product Settings page, select the **Enable LinkedIn Integration** setting.
2. In the Enable Spell Checker page, select Edit next to the title page
3. In the Editor page, make sure the Value is set to Yes.

   By default, the spell checker option is set to Yes, therefore enabled.

Disabling the Spell Check Feature

Disabling the spell check feature deactivates the related feature in Performance and removes the ability for the user to see misspelled words as comments are typed as well as to select a replacement from a list of suggested words or to accept the word as is.

Configuration > **[Taleo Performance] Settings**

1. In the Product Settings page, select the **Enable LinkedIn Integration** setting.
2. In the Enable Spell Checker page, select Edit next to the title page
3. In the Editor page, set the Value to No.

   By default, the spell checker option is set to Yes, therefore enabled.

Creating the Legal Agreement to be Shown to Users at Log In

Creating the legal agreement allows the user to actually write the content of the agreement.

Configuration > **[Security] Legal Agreements**

To be entitled to perform this task, the user must have the following user type permission:

- Manage legal agreements

1. In the Legal Agreements page, click Create.
2. In the creation page, enter the code, name and text of the agreement.

   The text can be formated as desired using the editing options.
3. Click Save.

The newly created agreement is shown in the list of available legal agreements.

For the legal agreement to be displayed, it must first be activated and then set to be displayed.

Activating the Legal Agreement

Activation of a legal agreement is required for it to be displayed.

Configuration > **[Security] Legal Agreements**

To be entitled to perform this task, the user must have the following user type permission:

- Manage legal agreements

The desired legal agreement must be created.

1. In the Legal Agreements page, click the name of the legal agreement you wish to activate.
2. In the specific Legal Agreement page, click Activate.

   If another agreement is already active, a message will inform you the activation of the current agreement will deactivate the other one, since only one agreement at a time can be active.
3. Click Yes to make the current agreement active.

In the list of legal agreements, the Active status will display next to the agreement.

For the agreement to actually be displayed to users, the related security policy setting has to be set to Yes.

Displaying the Legal Agreement to Users at Log In

Displaying the legal agreement is done by setting the related security policy to Yes.

Configuration > **[Security] Security Policies**

To be entitled to perform this task, the user must have the following user type permission:

- Manage legal agreements

Before setting the legal agreement to be displayed, it needs to be created and activated.

1. In the Security Policies page, click Edit next to Sign In.
2. In the Security Policies Editor page, select Yes for the Show the legal agreement to users at login.
3. Click Save.

The legal agreement is now configured to be displayed and will be shown to all users before they log into a Taleo product.

Job Role/Job Title/Position Display Setting Management

This feature provides your organization the ability to configure the display behavior of the Job Role, Job Title and Job Position fields in applicable areas of Performance Management. This is done using a pair of global configuration settings: **Show Job Role Name or User Title** and **Enable Job Position to Override Job Role or Job Title**.

The settings are described in the following Configuration table. The areas and fields in Performance Management in which Job Role, Job Title or Job Position are displayed and affected by these settings are detailed in the reference table titled Applicable Fields Using Job Role, Job Title and Job Position.

Configuration

The display of Job Role, Job Title and Job Position in many parts of the application can be controlled by the configuration settings in the following table. The settings are located in Configuration under the following navigation: **[Performance] Settings > [Product Settings] > [Refine By] Keyword > Job Role)**.

Setting Name	Description	Possible Values	Security Level	Setting Category
Show Job Role Name or User Title	Use to specify whether the Job Role name or the User Title is displayed in applicable areas of the application. (This is a setting introduced in Feature Pack 7.5.)	• Job Role Name (default) • User Title	Public	Global
Enable Job Position to Override Job Role or Job Title.	For implementations using Position Management, use to indicate whether or not to use Job Position to override the Job Role or User Title in applicable areas of the application. (This is a setting introduced in Feature Pack 13B.)	• Default value is Yes (true). Allows the job position to override the job role and user title in the application. • No (false) removes the job position override of the other values. Either the job role or job title is displayed based on the setting **Show Job Role Name or User Title.**	Public	Global

Applicable Job Role/Job Title/Position Fields

Applicable Fields Using Job Role, Job Title and Job Position

Application behavior with respect to the display of the Job Role, Job Title and Job Position fields is standardized in Performance Management, as summarized in the following table:

Applicable Fields Using Job Role, Job Title and Job Position			
Application Area	**Application Sub-Area**	**Application Behavior Prior to 13B**	**Application Behavior After 13B**
Collaboration	My Network / Expand employee	Uses either Job Role or Job Title based on setting "Show Job Role Name or User Title".	No change.
Development Plan	Admin access development plan / request approval, Job Title	Uses either Job Role or Job Title based on setting "Show Job Role Name or User Title".	No change.
Development Plan	Print Title	Uses either Job Role or Job Title based on setting "Show Job Role Name or User Title".	Checks setting "Enable Job Position to Override Job Role or Job Title."
Goal Plan	Admin access Goal Plan / request approval, Job Title	Uses either Job Role or Job Title based on setting "Show Job Role Name or User Title".	No change.
People Selector	Search result, Job Title	Uses either Job Role or Job Title based on setting "Show Job Role Name or User Title".	No change.

Applicable Fields Using Job Role, Job Title and Job Position			
Application Area	**Application Sub-Area**	**Application Behavior Prior to 13B**	**Application Behavior After 13B**
People Selector	Tool tip, Job Title	Uses either Job Role or Job Title based on setting "Show Job Role Name or User Title".	No change.
Performance Card / Employee Card	Job Title	Uses Job Position always when exists.	Checks setting "Enable Job Position to Override Job Role or Job Title."
Performance Review	General Information, Job Title	Uses either Job Role or Job Title based on setting "Show Job Role Name or User Title".	No change.
Performance Review	Review tab/view, General Information section, Author Job Title and Job Title	Uses either Job Role or Job Title based on setting "Show Job Role Name or User Title".	Checks setting "Enable Job Position to Override Job Role or Job Title."
Performance Review	Print Job Title, Author Job Title	Uses either Job Role or Job Title based on setting "Show Job Role Name or User Title".	No change.
Review Hub	Employee card, Job Title	Uses Job Position always when exists.	Checks setting "Enable Job Position to Override Job Role or Job Title."
Review Hub	List view, Job Title	Uses Job Role Name.	No change.
Review Hub	Matrix view, Job Title	Uses Job Position always when exists.	Checks setting "Enable Job Position to Override Job Role or Job Title."
Review Hub	Employee detail, Job Title (header)	Uses Job Position always when exists.	Checks setting "Enable Job Position to Override Job Role or Job Title."
Review Hub	Employee detail, Job Title (in metrics detail list)	Uses Job Position always when exists.	Checks setting "Enable Job Position to Override Job Role or Job Title."
Succession Plan	Admin access Succession Plan/ request approval, Job Title	Uses either Job Role or Job Title based on setting "Show Job Role Name or User Title".	No change.
Talent Browser	Organization Chart view, Card, Employee Title	Uses Job Position always when exists.	Check setting "Enable Job Position to Override Job Role or Job Title."

Applicable Fields Using Job Role, Job Title and Job Position			
Application Area	**Application Sub-Area**	**Application Behavior Prior to 13B**	**Application Behavior After 13B**
Talent Browser	Request Employee Change dialog	Uses either Job Role or Job Title based on setting "Show Job Role Name or User Title".	No change.
Talent Browser	Matrix manager Add page, Job Title	Uses either Job Role or Job Title based on setting "Show Job Role Name or User Title".	No change.
Talent Browser	Snapshot Card, Manager and Employee Title	Uses Job Position always when exists.	Checks setting "Enable Job Position to Override Job Role or Job Title."
Talent Pool	Member tab, list view, Job Title	Uses Job Position always when exists.	Checks setting "Enable Job Position to Override Job Role or Job Title."
Talent Pool	Detail tab, user list view, Job Title	Uses Job Position always when exists.	Checks setting "Enable Job Position to Override Job Role or Job Title."
Talent Pool	Member tab, matrix view, Employee details	Uses Job Position always when exists.	Checks setting "Enable Job Position to Override Job Role or Job Title."
Talent Pool	Detail tab, chart cell view, Job Title	Uses Job Position always when exists.	Checks setting "Enable Job Position to Override Job Role or Job Title."
Talent Pool	Add people to Talent Pool with People Selector	Uses either Job Role or Job Title based on setting "Show Job Role Name or User Title".	No change.
Talent Pool	In pool Details tab, pool context, Job Role name	Not using Job Position. Label is Job Title but content is really Job Role.	No change.
Talent Profile	General section header, Job Title	Uses Job Position always when exists.	Checks setting "Enable Job Position to Override Job Role or Job Title."
Talent Profile	Employee Information section	Uses Job Position always when exists.	Checks setting "Enable Job Position to Override Job Role or Job Title."
Talent Profile	Print Title	Uses either Job Role or Job Title based on setting "Show Job Role Name or User Title".	Checks setting "Enable Job Position to Override Job Role or Job Title."

Applicable Fields Using Job Role, Job Title and Job Position			
Application Area	**Application Sub-Area**	**Application Behavior Prior to 13B**	**Application Behavior After 13B**
Talent Search	Search result list view, Job Title	Uses either Job Role or Job Title based on setting "Show Job Role Name or User Title".	No change.
Talent Snapshot Card	Employee Title	Uses Job Position always when exists.	Checks setting "Enable Job Position to Override Job Role or Job Title."
Talent Snapshot Card	Current Position	Uses Job Position always when exists.	Checks setting "Enable Job Position to Override Job Role or Job Title."
Talent Snapshot Card	Manager Title	Uses Job Position always when exists.	Checks setting "Enable Job Position to Override Job Role or Job Title."
Talent Snapshot Card	Succession Plan, Successor Title	Uses Job Position always when exists.	Checks setting "Enable Job Position to Override Job Role or Job Title."

Product Resource Administration

Application Label Customization

This enhancement provides the ability for text strings available in the Performance's user interface to be customized to the specific terminology used by clients.

The customization is performed in the TexTool application. The label changes can be done by Taleo consultants during implementation or by technical support via service requests.

Labels can be modified for any active language in a live production zone.

In order to modify labels, the following tasks need to be performed:

- In Performance, identify the resource ID associated to the labels to be changed.
- In TexTool, create a project associated with the customer, modify the labels and apply the project.

When labels are customized, it is important for clients to update their documentation accordingly, as Taleo provides all documentation materials based on the default labels.

Displaying Resource Identifiers

The Display Resource Identifiers user type permission is required.

Configuration > **[Product] Administration** > **Resource Administration**

1. Click Show Identifiers.
2. Close this window.

Starting with the next page that is displayed, resource IDs will be displayed in front of each element of the application.

Displaying Resource Identifiers in Performance

The **Display Resource Identifiers** user type permission is required.

1. Login to Performance as a support user.
2. Select via **Resources > My Setup > Miscellaneous Preferences > Display resource identifiers**.
3. Click **Save** and navigate to a different part of Taleo Performance.

The resource IDs are displayed.

You can return to **My Setup** and clear the option to hide the resource IDs.

Hiding Resource Identifiers

Resource Identifiers must be displayed.

The Display Resource Identifiers user type permission is required.

Configuration > **[Product] Administration** > **Resource Administration**

1. Click Hide Identifiers.
2. Close this window.

Starting with the next page that is loaded, resource IDs will no longer be displayed in front of each element of the application.

Removing History Elements

Removing history elements reduces the number of irrelevant history tracking events.

A mechanism automatically deletes history elements older than their defined retention period. This is applied to SmartOrg and Performance specific elements.

Performance Management	
Element	**Retention (Months)**
User-defined Selections	12
Talent Pool Management Center	12
Performance Management Center	12
Chart Configuration	12
Matrix Configuration	12
Competency Goal	14
Pool Item	14
Pool	14
Message Templates	12
Documents	12
Paragraphs	12
Product Setting	12
User Account (user access)	6
Review Text	12
Review Definition	12
Review Cycle	12
Business Goal	14
Business Project	12
Business Theme	12
Business Period	12
Employee Goal	14
Employee Goal Plan	14
Goal Template	12
Succession Plan	14
Development Activity	14
Development Plan	14
Development Plan Template	12
Development Activity	12
Development Activity Category	12
Mentoring Relationship	14

Performance Management	
Element	**Retention (Months)**
Rating Dimension	12
Rating Model	12
Partners	12

Taleo Configuration / SmartOrg	
Element	**Retention (Months)**
Welcome Center Content	12
Seats	12
Coverage Areas	12
Message Templates	12
Documents	12
Paragraphs	12
Messages	12
Product Setting	24
User Types	12
User File	18
Groups	12
User Account (user access)	6
Configuration Profile	12
Organizations	18
Organization Level	18
Location	18
Location Level	18
Job Field	18
Job Field Level	18
Business Organization	18
Business Organization Level	18
Positions	18
Competencies	18

Taleo Configuration / SmartOrg	
Element	**Retention (Months)**
Competency Categories	18
Competency Groups	18
Competency Context	18
Competency Definition Context	18
Guidance Plan	18
Rating Dimension	18
Rating Model	18
Job Role	18
Job Role Context	18
Job Profile Classification	18

2 User Account Administration

Working with User Accounts

User Account

A user account is created for each user who has access to Oracle Taleo Enterprise Edition applications on a regular or occasional basis.

User accounts are defined by system administrators in SmartOrg. (Navigation: Configuration > [SmartOrg] Administration > [Users] User Accounts.) When creating a user account, system administrators define several elements.

Element	Description
Personal Information	Basic information such as first name, last name, title, employee ID. The Employee ID field is necessary in order to create the employee record when being fed over from an external system. Address information. Email information. The Email Address and Current logged-in user password fields are mandatory. If the zone uses Taleo login, the field Current logged-in user password is displayed and you must provide your credentials to modify the user's password. If the zone is configured to use SSO, the field is not displayed. Phone information. Department information.
Employee Information	Used for Performance and Dynamic Approval Routing. Once information in this section is provided, both an employee and a candidate file are created for this user and this operation cannot be reverted. Note that only employees can be users of Taleo Performance. Fields to complete are: • Employee picture • Employee status • Employee manager • Organization, Location, Job Role Any time one of the following events occurs, an entry is added to the Employee History section: updates to employee status; updates to manager, new organization or location; new job role. An entry is recorded whether the change was made directly on the user account page, in Performance or through SmartOrg integration. The Employee History section is only displayed in Show mode.
Account Information	Contains information such as user name, password, external user identifier. This is where you can perform actions such as generating a new password, deactivating the user account, locking the user account, transferring and delegating tasks to another user.

Element	Description
	The Current logged-in user password field is mandatory. If the zone uses Taleo login, the field Current logged-in user password is displayed and you must provide your credentials to modify the user's password. If the zone is configured to use SSO, the field is not displayed.
User Types	User types assigned to the user account. Each user account is assigned at least one user type for which a series of permissions are granted.
User Groups	User groups to which the user is part of.
Coverage Areas	Functional domains to which a user has access. For example, development plans and goal plans in Performance, requisitions and search in Recruiting. Functional domains are tied to Organizations, Locations and Job Fields. The configuration is not mandatory.
General Preferences	General preferences are assigned to each user account, for example, frequent collaborators and approvers, preferred content language.

User Account General Preferences

General preferences are assigned to each user account.

A user's general preferences are defined by system administrators in the User Account feature available in SmartOrg. Most general preferences can be modified by users in Recruiting, in the My Setup feature, to fit their personal preferences.

Certain user account general preferences are tied to a configuration setting. When this is the case, the setting sets a value for an entire zone, the user account general preference sets a value for a specific user, then that specific user can set his/her own personal preference (see table below).

> **Note:** It is important at deployment to review the defaults for the Default Recruiter and Default Hiring Manager user preferences in My Setup. By default, if there is no Default Recruiter or Default Hiring Manager specified for a user's preference, when the user creates a requisition he/she will be automatically listed as the "Recruiter" on the requisition. If a user has his/her name in the Default Hiring Manager field, this will take precedence and the user will have his/her name appear in the Hiring Manager field rather than the Recruiter field. For proper behavior of managers, it is recommended to specify this information automatically upon integration imports of manager User data.

User Account General Preference (SmartOrg Administration > User Accounts > General Preferences)	Setting (Configuration > Settings)	User Personal Preference (Recruiting Center > Resources > My Setup)	Comments
Accessibility Features	Accessibility Features	Accessibility Features	
Candidate List Content		Candidate List Content	By default, shows only candidates that are in selection process (if relevant).
Content Language	Content Language	Content Language	

User Account General Preference (SmartOrg Administration > User Accounts > General Preferences)	Setting (Configuration > Settings)	User Personal Preference (Recruiting Center > Resources > My Setup)	Comments
Correspondence Language	Correspondence Language	Correspondence Language	
Country			
Default Distance Unit	Default Distance Unit	Default Distance Unit	
Default Hiring Manager		Default Hiring Manager	See Note above.
Default Recruiter		Default Recruiter	See Note above.
Default Text Size	Default Text Size	Default Text Size	
Default Theme	Default Theme	Default Theme	
Display candidates on first CSW step			
Display Question Details in Libraries		Display Question Details in Libraries	
Enable eShare Email for Response Center Access	Enable eShare Email for Response Center Access	Enable eShare Email for Response Center Access	
Enable Recruiting Activity Monitoring			
Fax Notification	Fax Notification	Fax Notification	Sends notifications to users by fax, not by email.
Frequent Collaborators		Frequent Collaborators	
Identifier Content		Identifier Content	
Integration Profile Type		Integration Profile Type	
Last Update		Last Update	
Offer Frequent Approvers		Frequent Approvers - Offer	
Place of Residence		Place of Residence	
Preferred Non-Electronic Media		Preferred Non-Electronic Media	
Requisition File Automatic Filling		Requisition File Automatic Filling	Indicates if the user will use the "automatic filling" option of the requisition file.
Requisition Frequent Approvers		Frequent Approvers - Requisition	
Selected Item Default Color	Selected Item Default Color	Selected Item Default Color	
Sorting Key		Sorting Key	
SSO Preferred Application Language			Allows users who log in using Single Sign-On to change their application language.
Tab displayed when accessing a candidate file from a list		Tab displayed when accessing a candidate file from a list	

User Account General Preference (SmartOrg Administration > User Accounts > General Preferences)	Setting (Configuration > Settings)	User Personal Preference (Recruiting Center > Resources > My Setup)	Comments
Tab displayed when accessing a candidate file in navigation		Tab displayed when accessing a candidate file in navigation	
Time Zone	Time Zone	Time Zone	
When managing by candidate		When managing by candidate	
When managing by offer		When managing by offer	
Workflow Event Notification	Workflow Event Notification	Workflow Event Notification	Keeps the user informed of workflow events by email.
Zip Code			Used in search preferences, with the location (place of residence) and last update.

User Account Status

A user account is assigned a status.

- Active: Only the name and description can be modified.
- Inactive: Only the status can be modified. The only possibility is to go back to the Active status. Inactive users cannot be selected.
- Deleted: The user account has been deleted.
- Locked: The user account has been locked. The user cannot access Oracle Taleo Enterprise Edition products.
- Expired:

Employee Information

Employee information is specific to Performance and to Recruiting for the Dynamic Approval Routing feature.

Employee information is defined in the User Accounts feature available in SmartOrg.

Certain fields in the Employee Information section are not mandatory. However, when fields in this section are populated, the Organization and Location fields become mandatory.

If inserting a picture of the employee, the file limit is 20 KB and the only supported format is .jpg. Note that the uploaded file is cropped from the center to obtain a square (so make sure the picture is correctly centered) and it is then resized to 48 X 48 pixels which results in about 5 KB.

An employee can have one of the following statuses:

- New: New employees currently in an onboarding process.
- Current: Default value.
- Former Employee

If no data is entered in the Job Role and Employee Status fields, default values are assigned automatically by the system, which are Employee and New respectively.

Any time one of the following events occurs, an entry is added to the Employee History section: updates to employee status; updates to manager, new organization or location; new job role. An entry is recorded whether the change was made directly on the user account page, in Performance or through SmartOrg integration. The Employee History section is only displayed in Show mode.

User Account - Other Configuration Tasks

Creating a User Acount

The *Manage user accounts* user type permission is required.

In the Employee Information section, certain fields are not mandatory. However, when fields in this section are populated, the Organization and Location fields become mandatory.

In the Employee Information section, if no data is entered in the Employee Status and Job Role fields, these fields will be populated with their default values, Current and Employee.

Configuration > [SmartOrg] > Administration > User Accounts

1. Click Create.
2. Specify the language in which you want to create the user account.
3. Complete the fields in each section presented by the User Account Wizard.
4. Click Next to navigate between sections.
5. Click Finish.

The user account appears in the User Accounts list.

If the Employee Information section is completed, the user's profile is updated and the person is considered an "employee." Employees are used in Performance and the Dynamic Approval Routing.

Editing a User Account

The *Manage user accounts* user type permission is required.

Configuration > [SmartOrg] > Administration > User Accounts

1. Click a user account.
2. Click Edit next to the section you want to modify.
3. Make required changes.
4. Click Save.

Activating a User Account

The *Manage user accounts* user type permission is required.

Configuration > [SmartOrg] > Administration > User Accounts

1. Click a user account.
2. Click Activate in Account Information.
3. Click Yes.

Deactivating a User Account

The *Manage user accounts* user type permission is required.

You need to transfer the user's tasks to another user.

This feature may be useful for contract or temporary workers who assist on a assignment but who may leave and later return to an organization. When these workers return, you can reactivate the user account without having to reset their group association (because they are still tied to their user groups).

Configuration > [SmartOrg] > Administration > User Accounts

1. Click a user account.
2. Click Deactivate in Account Information.
3. Click Yes.

Deleting a User Account From the User Account Page

The Manage user accounts - Including HMRS fields user type permission is required..

Configuration > **[SmartOrg] Administration** > **User Accounts**

1. Locate the user in the User Accounts list.
2. Click Delete in the Actions column.
3. The action(s) you perform next vary depending on whether the user account is associated with an employee.
    - If the user account is associated with an employee who owns requisitions, templates or folders, or was assigned yet uncompleted actions, or reports to a manager, or has pending tasks or work items, perform the steps in the wizard.
    - If the user account is associated with someone for whom none of the previous conditions applies, click Yes.

Once deleted, the user account status is set to Deleted and the user account is deactivated.

To permanently delete employee data related to the employee, including employee metrics and all Performance data (as might be required in EMEA and other regions), see Employee Information Deletion Task.

Deleting the User Account of an Employee Using the Wizard

The Manage users - Including HMRS fields user type permission is required.

Configuration > **[SmartOrg] Administration** > **User Accounts**

1. Click the user account you want to disable.
2. In the Employee Information section, click Terminate.
   The wizard is displayed.
3. Perform the steps in the wizard.

The user account has Deleted status and therefore is no longer displayed on the User Accounts page if Active is selected in the View field. The Employee Status value is changed to Former Employee.

To permanently delete employee data related to the employee, including employee metrics and all Performance data (as might be required in EMEA and other regions), see Employee Information Deletion Task.

Deleting the User Account of an Employee Manually

The Manage users - Including HMRS fields user type permission is required.

Configuration > **[SmartOrg] Administration** > **User Accounts**

1. Click user account you want to disable.
2. Edit the Employee Information section as necessary.
3. Set employee status to Former Employee.
4. Provide a termination date.
5. Remove the manager.
6. Transfer direct reports to another manager if applicable.
7. Transfer ownership of talent pools and positions to another user.
8. Transfer pending tasks to another user.
9. Return to the User Accounts page, locate the user account in the list and click the corresponding Delete in the Actions column.
10. Click Yes.

Once deleted, the user account status is Deleted and the user account is deactivated.

To permanently delete employee data related to the employee, including employee metrics and all Performance data (as might be required in EMEA and other regions), see Employee Information Deletion Task.

Assigning a User Type to a User Account

The *Manage user accounts* user type permission is required.

Configuration > [SmartOrg] > Administration > User Accounts

1. Click a user account.

2. Click Edit next to User Types.
3. Click Add next to User Types.
4. Select one or several user types.
5. Click Select.

The user types appear in the User Types list.

Removing a User Type Assigned to a User Account

The *Manage user accounts* user type permission is required.

Configuration > [SmartOrg] > Administration > User Accounts

1. Click a user account.
2. Click Edit next to User Types.
3. Click Remove next to the user type.

The user type is no longer displayed.

Assigning a user type to the user account.

Associating a Configuration Profile to a User Account

The *Manage user accounts* user type permission is required.

Each user account is assigned one configuration profile. If no configuration profile is used, the default value of each setting is used.

Changes made to a configuration profile are applied the next time a user linked to this configuration profile logs in.

Configuration > [SmartOrg] > Administration > User Accounts

1. Click a user account.
2. Click Edit next to Account Information.
3. Choose a configuration profile.
4. Click Save.

Assigning a Personal Coverage Area to a User Account

The *Manage user accounts* permission is required.

Configuration > **[SmartOrg] Administration** > **User Accounts**

1. Click a user account.
2. Click Create next to Personal Coverage Areas.
3. Click Add next to Functional Domains.
4. Select the desired functional domains then click Select.
5. Click Save.
6. If desired, specify organizations, locations and/or job fields for the coverage area.

If no Organization-Location-Job Field structure is specified, then the coverage area will apply to all organizations, locations and job fields .

Locking a User Account

Allows a system administrator to lock a user account if, for example, the user was fired.

The *Manage user accounts* user type permission is required.

Configuration > [SmartOrg] > Administration > User Accounts

1. Click a user account.
2. Click Lock in Account Information.
3. Click Yes.

Deactivating the user account.

Transferring the user's tasks.

Unlocking a User Account

Allows a system administrator to unlock a user account if, for example, a user enters an incorrect password too many times and the system locks the account.

The *Manage user accounts* user type permission is required.

Configuration > [SmartOrg] > Administration > User Accounts

1. Click a user account.
2. Click Unlock in Account Information.
3. Click Yes.

Generating a Password

Allows a system administrator to generate a password for a user if, for example, the user does not have his/her username handy or does not have an e-mail address to receive a temporary access code.

The *Manage user accounts* user type permission is required.

Configuration > [SmartOrg] > Administration > User Accounts

1. Click a user account.
2. Click Generate Password.
3. Specify if you want to send the password in an e-mail. The user will be forced to change his/her password at next login.
4. Enter your password in the Current logged-in user password field.

   If the zone uses Taleo login, the field is displayed and you must provide your credentials to modify the user's password. If the zone is configured to use SSO, the field is not be displayed.

5. Click Yes.

The newly created password displayed on screen is masked with asterisks to protect the information from potential shoulder surfing attacks. You can momentarily select the "Show password" check box to view the password when it is considered safe to do so.

Task Delegation

Users may have the ability to delegate tasks to another user for a short preset period of time.

Task delegation is useful during the time a user is on vacation or on a sick leave. When selecting a user (new owner) to whom tasks will be delegated, the following rules apply:

- The new owner must have the same user type permissions (constraints not included) as the current owner.
- The new owner must be at least in all the same groups as the current owner.
- If the current owner is an eShare user (not a Taleo application user), the new owner must also be an eShare user.

Note: When a user delegates tasks to an alternate user, if the user is a collaborator on a requisition, the alternate user must also be made collaborator on that requisition in order to perform the same actions as the user. The system does not automatically allow the delegated to interact as a collaborator on behalf of the original user.

Delegating Work Items

The *Manage user accounts* user type permission is required.

For a user to be valid for delegation, the following rules must be applied:

- The new owner must be different from the current owner.
- It is always possible for a Recruiting Center user to be the new owner.

Configuration [SmartOrg] > Administration > User Accounts

1. Click a user account.
2. Click Delegate in Account Information.
3. Select a user.
4. Select From and To dates.
5. Click Save.

Transferring Work Items

The *Manage user accounts* user type permission is required.

If the work items transferred belong to an employee, the designated user must also be an employee.

The owner of the work items transferred must have the same user type as the designated user.

Configuration > [SmartOrg] > Administration > User Accounts

1. Click a user account.
2. Click Transfer in Account Information.
3. Select a user.
4. Click Save.

Tasks have been transferred permanently to another use.

Deleting the user account.

Working with User Types

User Type

A user type is composed of a set of permissions from multiple functional domains. These permissions provide access to various products and control what a user associated to the user type can do.

User types are centrally managed in SmartOrg for all products. Default user types are provided with the system. System administrators can also create new user types.

Users are assigned a user type and one user can be associated to several user types. For example, the Recruiter and Administrator user types for Recruiting, and the Manager user type for Performance.

Note:

- It is recommended to leave untouched the default user types.
- When creating a user type, it is recommended to duplicate an existing user type that has been validated in the zone already to work properly.
- If possible, use a single user type which combines all necessary permissions.

User Type Permission

User type permissions grant users access to specific features and contexts in a product or application.

Permissions are organized by functional domains (core products):

- Recruiting
- Integration
- Configuration
- Performance
- Grid
- Compensation

- Learning
- Reporting and Analytics
- Mobile
- Common

Functional domains are then separated into sub-domains. Depending on the amount of permissions in a sub-domain, permissions may be grouped into sections. When permissions are grouped into sections, system administrators can select the desired section in a drop-down list and quickly see the permissions grouped in that section.

Example of how permissions are organized in a functional domain	
Functional Domain	Recruiting
Sub-Domain	Requisitions
Section	Requisition Types
Permission	Allow access to professional requisitions
Permission	Allow access to hourly requisitions
Permission	Allow access to campus requisitions
Permission	Allow access to contingent requisitions
Permission	Allow access to executive requisitions
Permission	Allow access to pipeline - general requisitions
Permission	Allow access to pipeline - executive requisitions

Functional domains are displayed in bold when permissions have been granted. Also, the Expand All button allows system administrators to see at a glance all domains, sub-domains and permissions granted to a user type.

If a system administrator modifies the permissions associated with a user type, the changes affect all users who have been assigned the user type.

For a list of default user types and their default permissions, refer to the document entitled *Default User Types and Permissions*.

Taleo Performance User Type Permissions

The security model used in Performance, represented by user type permissions, enables granular combinations of user access rights to be configured.

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

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

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

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

As user permissions are not confined to a specific user type or profile, access typically limited to admin users can be given to any user. The configuration setting Access administration tools enables any user to have access to HR Administration Tools from their home page. A typical user with Access administration tools enabled for a functional domain can only see employees they have access to, such as direct reports or those within a group, and do not have access to all employees like an admin user. For instance, a manager could have access to all direct reports from HR Administration Tools > Performance Reviews and be able to perform actions from there instead of having to access them individually from Manager Center > Performance Review.

Default User Types

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

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

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

HR Administrator

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

The ability to use the HR Administration Tools is the most important part of the HR Administrator's permissions. These tools enable the administrator to troubleshoot approvals and restart them or complete them as necessary. This

enables the administrator to act as the first line of support and potentially quickly resolves problems for managers and employees.

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

Manager

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

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

Employee

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

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

Default User Type Permissions

This table indicates which permissions the three default user types have, along with encompassing the domains and permissions a Performance user could reasonably be expected to need.

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

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

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

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

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

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

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

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

Configuring User Types

Creating a User Type

When creating a user type, it is recommended to duplicate an existing user type that has been validated in the zone already to work properly.

The *Manage user types* user type permission is required.

Configuration > **[SmartOrg] Administration** > **User Types**

1. Click Create.
2. Enter a code and a name.
3. Enter a description to clarify the intent of the user type.

   The description is displayed in the user type selector and listed under the user account definition page.
4. Select Active from the Status list so it can be added to user accounts and groups, otherwise select Inactive.
5. Click Save.
6. Click the Arrow icon beside the functional domain you want to configure and click Edit to display the user type permissions.

7. Select the required view and manage permissions and click Save.

Activating a User Type

The *Manage user types* user type permission is required.

Configuration > **[SmartOrg] Administration** > **User Types**

1. Click a user type.
2. Click Edit next to Properties.
3. Select either Active or Inactive from the Status list.
4. Click Save.

If changed to Active, the user type can now be associated with a user account or group and the status Active appears in the User Types list. If changed to Inactive, the user type cannot be associated to any new user accounts or groups, but will remain valid for those it is already associated with.

Deactivating a User Type

The *Manage user types* user type permission is required.

The user type must have the Active status.

Configuration > **[SmartOrg] Administration** > **User Types**

1. Click a user type.
2. Click Edit next to Properties.
3. Select Inactive in the Status field.
4. Click Save.

The status Draft appears in the User Types list.

Duplicating a User Type

The *Manage user types* user type permission is required.

Configuration > **[SmartOrg] Administration** > **User Types**

1. Locate the user type you want to duplicate.
2. From the Actions column, click Duplicate for the user type.
3. Change the code, name and description as required.

   When you have more than one language, after entering the name for the initial language, click Refresh and select the next language from the list and click Refresh again. Enter the required value for that language and then choose the next language, click Refresh and repeat the process.
4. Click Save.

On the user type definition page, your actions are displayed in the History section. On the User Types page, the new user type is displayed and its status is Active.

Editing a User Type Properties

The *Manage user types* user type permission is required.

Configuration > **[SmartOrg] Administration** > **User Types**

1. Click a user type.
2. Click Edit next to Properties.
3. Make the required changes to the code, name and description.
4. Click Save.

Dissociating All Users from a User Type

The *Manage user types* user type permission is required.

Configuration > **[SmartOrg] Administration** > **User Accounts**

1. In the Refine by field, select User Type.
2. In the adjacent field, enter a word or part of a word found in the name of the user type you want to delete.
3. Click Refresh.
4. Click a name displayed in the User Accounts list.
5. Click Edit next to User Types.
6. Locate the user type you want to remove and click Remove in the Actions list.
7. Click Save.
8. Repeat steps 4 to 7 for each user who has the user type you want to delete.

The user type is no longer displayed in the User Types list.

Granting a User Type Permission

The *Manage user types* user type permission is required.

Configuration > **[SmartOrg] Administration** > **User Types**

1. Click a user type.
2. Click a functional domain.
3. Click Edit next to the sub-domain.
4. Select the permissions you want to grant.
5. Click Save.

All users assigned with this user type now have the selected permissions.

Revoking a User Type Permission

The *Manage user types* user type permission is required.

Configuration > **[SmartOrg] Administration** > **User Types**

1. Select a user type.
2. Click the functional domain (and in some cases the sub-domain) containing the permission.
3. Click Edit next to the section containing the permission you want to revoke.
4. Clear the check box next to the permission you want to revoke.
5. Click Save.

On the user type definition page, your actions are displayed in the History section. The users who have the user type will no longer have the permissions you revoked.

Working with User Groups

User Group

A user group is a group of people who need to have access to the same information for example, a group of people who works on the same requisitions.

User groups are used in Recruiting, Performance, and Reporting and Analytics.

The creation of groups typically simplifies the work of an organization because each group has access only to the information that its members need.

One group, called the Main Group, is created by default for all users within an organization. The Main Group's Organization- Location-Job Field structure cannot be modified.

The creation of user groups by system administrators involves:

- Defining a name for the group.
- Selecting users belonging to the group.
- Defining the coverage areas of the group to specify the product areas to which the group has access, that is selecting domains and sub-domains and linking them to organizations, locations and job fields.

For Reporting, group creation also involves:

- Creating a folder in Business Objects.
- Selecting groups that have the reporting domain tied to it to define who gets access to the reports within that folder.

Special rules regarding user groups:

- Users should be removed from the Main Group after being added to a specific group.
- To gain access to elements associated to a particular group, users must belong to that group.
- It is possible to delete a group only if all its members belong to at least one other group.
- It is not possible to delete a group if a user is associated to this group.
- It is not possible to delete a group if elements (such as requisitions) remain associated to the group.
- If a user is removed from a group and the user owns one or more element (such as requisitions) associated with this group, the elements will appear in red in the system (for example, in the requisition list) to indicate that there is a conflict.

System administrators have the ability to assign a default user group to newly created users. The Default User Groups setting, available under the General Configuration settings, can be used to indicate which user group new users will be automatically assigned. The default user group is automatically assigned only when no user group was manually assigned during the user account creation process. When the setting value is left empty, no default user group is assigned when creating new users. See *Assigning a Default User Group*.

User Group Management

User groups are used in Recruiting, Performance and Reporting and Analytics.

- Recruiting Center
  - It is possible to create a user and to not link the user to a user group. In Recruiting Center, it is recommended that users belong to at least one user group if they are a recruiting user who creates, approves or manages requisitions. If a user is authorized to search, the user will be able to view candidates of all Organization-Location-Job Field structures unless a user group using the recruiting search domain.

- Search and requisition are independent domains that can be individually applied to a user group.
- If users do not belong to a group linked to the Requisition domain, and they are a Recruiting user, the user will only see requisitions they own or collaborate on or without restriction (All) if so authorized. The user will not see information in or by group, even if their user type permission state otherwise – since there are no groups linked to the user to view. In addition, the user will not see information in or by group, even if their user type permission state otherwise – since there are no groups linked to the user to view.

- Performance
  - Users will only see the data of the domain that belongs to their group, provided they have the proper user type permission.
  - It is possible to create a user and not link the user to a group for a given domain. For all sub-domains (except for the Employee Succession Search) users will not be able to see information in or by group, even if their user type permission state otherwise – since there are no groups linked to the user to view. If a user is authorized to search (sub-domain Employee Succession Search), the user will be able to view employees of all Organization-Location-Job Field structures.
- Reporting and Analytics
  - The reporting administrator creates documents within the reporting and analytics environment. These include Web Intelligence Documents, Analytics, Advanced Analytics, Single Dashboards, Tiered Dashboards, Hyperlinks, Desktop Intelligence Documents and imported files (PDF, XLS, DOC, TXT, etc…)
  - Each reporting document is filed into a "folder."
  - Each reporting folder can be linked to one or more reporting groups containing the reporting domain.
  - Users can belong to one or more groups that have the reporting domain associated, Reporting Administrator ties these groups to reporting folders where reporting and analytic documents are filed.
  - Users only have access to the documents included in the folders to which their group(s) are linked. With the exception of reporting administrators, if a user has no groups linked to a reporting domain, he/she will not be able to see any reports.
  - When generating a report data presented is still derived by user's access in that application (Recruiting Center or Performance)

Creating a User Group

The *Manage groups* user type permission is required.

Configuration > **[SmartOrg] Administration** > **User Groups**

1. Click Create
2. Complete the New Group page.
3. If your organization activated more than one language, enter values for each of the other languages, being sure to click Refresh after you select a new language and before you enter the values for that language.
4. Click Save.

The system displays the user group. If you display the list of user groups, the new user group appears there.

Adding a User to a User Group

The *Manage groups* user type permission is required.

You must create a user group before you can add users to it.

Configuration > **[SmartOrg] Administration** > **User Groups**

1. Click a user group.
2. Click Add next to Users.
3. Click the check box next to each user you want to add to the user group.
4. Click Select.

The user is displayed in the Users list.

Removing a User from a User Group

The *Manage groups* user type permission is required.

Configuration > **[SmartOrg] Administration** > **User Groups**

1. Click a user group.
2. Click Show next to Users.
3. In the Actions column, click Remove next to the user you want to remove.

The user is no longer displayed in the Users list. The History section is not updated automatically but if you move to a different page and then display the user group definition page anew, the action you performed is displayed in the History section.

If you remove a user from a group and the user owns one or more requisitions associated with this group, the requisitions will appear in red in the Requisitions list to indicate that there is a conflict. To revert the situation, re-enter the owner of the requisitions in the group, reassign each requisition owned by this user to a new user who belongs to the same group, reassign each requisition owned by this user to a group to which the owner used to belong.

Deleting a User Group

The *Manage groups* user type permission is required.

It is not possible to delete a group if requisitions or templates remain associated to the group.

Configuration > **(SmartOrg) Administration** > **User Groups**

1. In the User Groups list, locate the user group you want to delete.
2. Click Delete in the Actions column.
3. Click Yes.

The user group is removed from the User Groups list.

Assigning a Default User Group

Configuration > **[General Configuration] Settings**

1. In the Refine by field, select Name.
2. Type Default User Group in the field.
3. Click the setting name.
4. Click Edit.
5. Click Add.
6. Select one or multiple user groups.
7. Click Select.
8. Click Done.

When creating new users, the selected user groups will be assigned if no user group was manually assigned during the user account creation process.

Coverage Area

A coverage area is a combination of functional domains, Organizations, Locations and Job Fields that together determine the scope of information available to a specific user group.

The coverage areas of a group define exactly what kind of information is available to the group's members. A coverage area typically contains domains (and perhaps subdomains), which are core products, and Organizations, Locations and Job Fields. The combination of domains, Organizations, Locations and Job Fields associated with a coverage area determine the scope of information available to the group for that area.

Adding a Coverage Area to a User Group

Allows the system administrator to limit the information available to a user group by specifying core products and Organizations, Locations and Job Fields.

The *Manage groups* user type permission is required.

You must create a user group before you can add coverage areas to it.

Configuration > **[SmartOrg] Administration** > **User Groups**

1. Click a user group.
2. Click Create next to Coverage Areas.
3. Click Add next to Functional Domains.
4. Select the domain/subdomain you want to make available to the user group.
5. Click Select.
6. Click Save.

The domains you selected are displayed in the Functional Domains section of the Coverage Area page.

Removing a Coverage Area from a User Group

Allows a system administrator to reduce the kinds of information currently available to the user group.

The *Manage groups* user type permission is required.

Configuration > **[SmartOrg] Administration** > **User Groups**

1. Click a user group.
2. Click Show next to Coverage Areas.
3. Click Remove next to the coverage area you want to remove.
4. Click Yes.

The coverage area is no longer displayed in the Coverage Areas list. The History section is not updated automatically but if you move to a different page and then display the user group definition page anew, the action you performed is displayed in the History section.

Adding Organizations, Locations and Job Fields to a Coverage Area

Allows the system administrator to further define which information will be available to members of the user group according to organizations, locations and job fields.

The *Manage groups* user type permission is required.

You must add functional domains to a coverage area before you can add Organization, Location and Job Field values.

Configuration > **[SmartOrg] Administration** > **User Groups**

1. On a Coverage Area page, click Add next to the type of item you want to add: Organizations, Locations or Job Fields.
2. After the system displays the corresponding selector page, click the check box next to each item you want to add to the coverage area.
3. Click Select.
4. You can repeat the previous steps if you added Organization elements, for example, and you also want to add Location and Job Field elements.

The Organization, Location and Job Field elements you added are displayed in the corresponding sections of the Coverage Area page.

Removing Organizations, Locations and Job Fields from a Coverage Area

The *Manage groups* user type permission is required.

Configuration > **[SmartOrg] Administration** > **User Groups**

1. Click a user group.

2. Click Show next to Coverage Areas.
3. Click a coverage area.
4. On the Coverage Area page, click Remove next to the item you want to remove.

The Organization, Location or Job Field element you removed is not longer displayed in the corresponding section of the Coverage Area page.

Reducing the Scope of a Coverage Area

You can remove functional domains, Organizations, Locations and Job Fields if you want to reduce the scope of a coverage area.

Configuration > **(SmartOrg) Administration** > **User Groups**

1. Click a user group.
2. Click Show next to Coverage Areas.
3. Click the coverage area you want to modify.
4. You can perform any of the following steps.
   - To remove a functional domain, Organization, Location or Job Field, click the corresponding Remove in the Actions column.
   - To remove all Organizations, all Locations or all Job Fields, click Remove All next to the corresponding item.

The items you removed are no longer displayed the Coverage Areas page. The actions you performed are displayed in the History section of the user group definition page.

Configuration Profiles

Configuration Profile

A configuration profile is a set of settings which control how the application behaves for a specific set of users to better fit the user experience.

It is through the configuration profile that different product behaviors can be achieved such as a streamlined manager product experience vs. a more robust recruiter product experience. Users may have the same set of permissions which grant access to specific features, but how a user is presented access to the features is then further controlled by the configuration profile designation.

In addition to user types (which define user access to specific features via permissions and product access) and user groups (which further define access to elements and functions based on Organization-Location-Job Field, users are assigned a configuration profile which defines what they will see in the Recruiting Center.

Configuration profiles are created in SmartOrg. Once created, a configuration profile is assigned to Recruiting Center users via their user account. Therefore, depending on the user signing into the application, elements displayed to the user will vary depending on the configuration profile associated to the user.

Three default configuration profiles are provided:

- Recruiter
- Hiring Manager
- Hourly Manager

System administrators can edit the settings for these default configuration profiles and can also create new configuration profiles. Changes made to a configuration profile are applied the next time a user linked to this configuration profile logs in. For a list of configuration profile settings, see *Configuration Profile Settings*.

System administrators have the ability to assign a default configuration profile to newly created users. The Default Configuration Profile setting, available under the General Configuration settings, can be used to indicate which configuration profile new users will be automatically assigned. The default configuration profile is automatically assigned only when no configuration profile was manually assigned during the user account creation process. When the setting value is left empty, no default configuration profile is assigned when creating new users. See *Assigning a Default Configuration Profile*.

Configuration Profile Settings

Configuration Profile Setting	Description
About Link in Auxiliary Menu	Display the about link in the auxiliary menu.
Advanced Search "Save Query" Button	Displays the "Save Query" button in the advanced search page.
Advanced Search Links	Displays the advanced search links.
Advanced Search Toolbar	Displays the advanced search toolbar.
Auxiliary Navigation Bar	Displays the auxiliary navigation bar.
Candidate File Creation	Indicates the files used to create a candidate.
Candidate List Format	Candidate list format available for users having this configuration profile.
Center Stage - Separator Line	Display a line between the Welcome title and the content of the main center stage (this line helps to help distinguish the title from the body portion of the page).
Center Stage - Welcome Title	Display the Welcome message when users first log in and are presented the Recruiting center stage.
Center Stage Configuration	Determine which center stage combination is used.
Center Stage Footer Text	Indicates if the center stage footer is displayed.
Communication Channel - Custom Link	Contains the link text towards the custom page in the communication channel.
Communication Channel - Custom Link Tooltip	Contains the tooltip text for the link towards the custom page in the communication channel.
Communication Channel - Custom Link URL	Indicates the URL of the custom page in the communication channel.
Communication Channel - Custom Text	Contains the text to be displayed in the custom communication channel.
Communication Channel - Custom Title	Contains the title to be displayed in the custom communication channel.

Configuration Profile Setting	Description
Communication Channel - HTML Custom URL	Indicates the URL of the HTML custom page in the communication channel.
Communication Channel Mode	Indicates the "Communications" channel mode to be used.
Core Navigation Bar	Displays the core navigation bar.
Customer Support Section	Enable the customer support section.
Customer Support Text	Contains the text to be displayed in the customer support section.
Default "Advanced Search" Field Configuration	Displays the selection of fields that are available to the user when performing an advanced search.
eLearning Section URL	Indicates the target URL to the eLearning section.
Oracle Support Link in Auxiliary Menu	Display the Support link in the auxiliary menu.
Recruiting Header Text	Displays the Recruiting header text.
Release Notes	Display the release note information when accessing the application, according to the user's profile.
Requisition File Automatic Filling	I want to use the "automatic filling" option of the requisition file.
Requisition File Creation	Indicates the files used to create a requisition.
Requisition List Format	Requisition list format available for users having this configuration profile.
Search Widget	Displays the search widget.
Default Value for the Show Information Filter	Determines the default value of the Show Information filter which controls the requisitions displayed in the Requisitions list and center stage channels. Possible values are: Requisitions I own (default); Requisitions I collaborate on; Requisitions I own or collaborate on; Requisition in my coverage area, I own or collaborate on; All requisitions.
Show information for Filter Visibility	Indicates whether the context filter control is displayed on the Recruiting requisition list and homepage.
Training Section URL	Indicates the target URL to the training section (Oracle University). The URL is http://education.oracle.com/pls/web_prod-plq-dad/ ou_product_category.getPage?p_cat_id=356.
View or Edit Requisition File	File used for viewing or editing a requisition.
Welcome Center Content	Indicates which customized content and layout will be used in the Welcome Center.

Creating a Configuration Profile

The *Manage configuration profile* user type permission is required.

Configuration > [SmartOrg] Administration > [Users] Configuration Profiles

1. Click Create.
2. Provide a code and a name.
3. Click Save.
4. Click configuration profile settings and set them as desired.

5. Click Save.

Activating a Configuration Profile

A configuration profile must have the Draft or Deactivated status.

The *Manage configuration profile* user type permission is required.

Configuration > **[SmartOrg] Administration** > **[Users] Configuration Profiles**

1. Click a configuration profile.
2. Click Activate.

Associating a Configuration Profile to a User Account

Configuration > **[SmartOrg] Administration** > **[Users] User Accounts**

1. Click a user account.
2. Click Edit next to Account Information.
3. Select a configuration profile.
4. Click Save.

Deactivating a Configuration Profile

A configuration profile must be activated.

The *Manage configuration profile* user type permission is required.

Configuration > **[SmartOrg] Administration** > **[Users] Configuration Profiles**

1. Click a configuration profile.
2. Click Deactivate.

Deleting a Configuration Profile

The *Manage configuration profile* user type permission is required.

The configuration profile must have the Draft or Inactive status.

Configuration > **[SmartOrg] Administration** > **[Users] Configuration Profiles**

1. Click Delete next to the configuration profile.
2. Click Yes.

Assigning a Default Configuration Profile

Configuration > **[General Configuration] Settings**

1. In the Refine by field, select Name.
2. Type Default Configuration Profile in the field.
3. Click the setting name.
4. Click Edit.
5. Click Search.
6. Select a configuration profile.
7. Click Select.
8. Click Save.

When creating new users, the selected configuration profile will be assigned if no configuration profile was manually assigned during the user account creation process.

Transferring an Employee's User Account Information

Transferring an employee's user account information in SmartOrg allows you to transfer all the tasks and objects owned by the user/employee and the related employees to a designated user.

Typically, transferring a user having Taleo Performance roles should be preceded by an organization chart and position update.

If the transferred user is also an employee, the designated user must also be an employee.

The transferred user must have the same roles and product accesses as the designated user.

Configuration > **[SmartOrg] Administration** > **[Users] User Accounts**

1. In the User Accounts page, select the user for which you want to perform a transfer.
2. In the User Account page of the selected user, click Transfer next to Account Information.
3. In the Transfer pop-up window, specify the name of the designated user of the transfer by selecting the right user in the User Selector window.
4. Click Save.

The following tasks, if existing, will be transferred to the designated user:

- Request to complete a performance review
- Request to approve a performance review
- Request to approve a succession plan
- Request to approve a succession pool
- Request to approve a goal plan

Employee Information Deletion Task

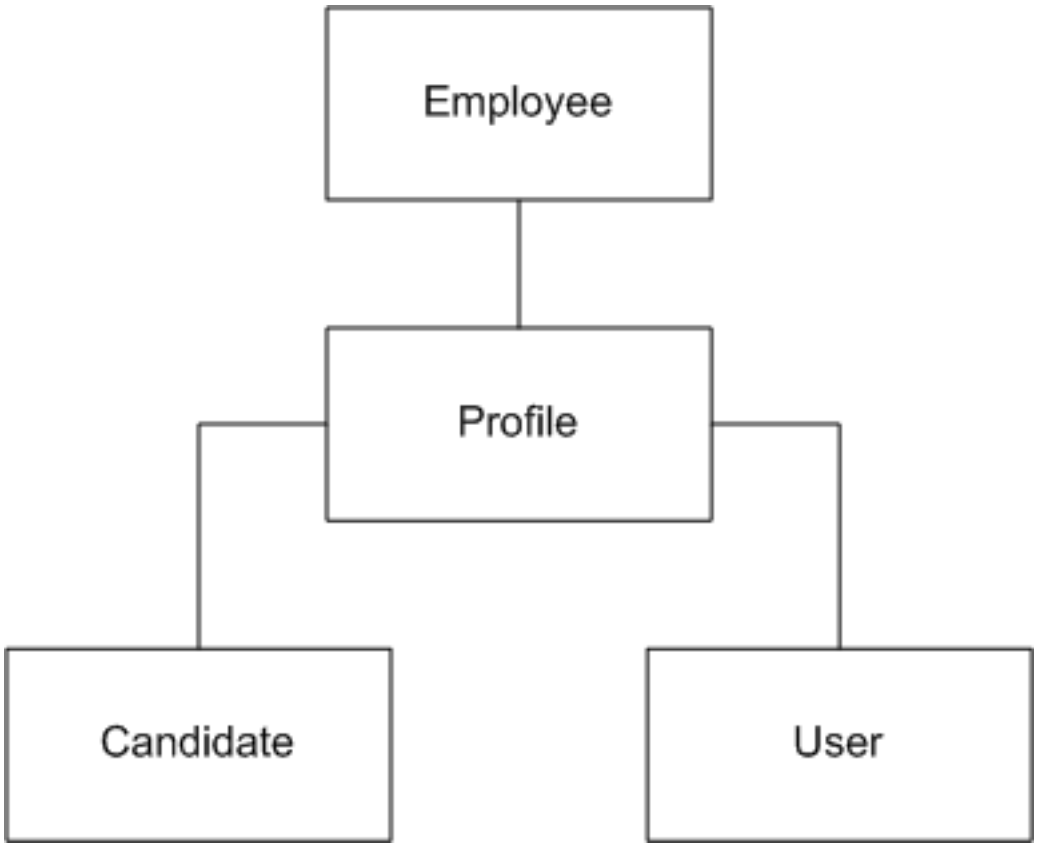
Employee Information Deletion Task

System administrators use the employee information deletion task to permanently delete information related to former employees' employment at the organization (as might be required by law in EMEA and other regions).

The Person Model

The following "objects" are associated with a person:

- 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 candidates are hired, a user account and an employee associated with their profile are created:

- 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 Information Deletion Strategy

Employee information deletion task permanently deletes employee-specific data only. The candidate account and common profile are unaffected. This enables a person to be rehired in the future by the organization. The person can remain in current pools and succession plans. The candidate account can eventually be deleted through a distinct task if Recruiting is available in the system.

Deleted	Not Deleted
Employee Specific Data • Employee Metrics • Pictures • Job History • Matrix Management • Remaining Tasks • Compensation History • Goal Plans, Goals, Tasks (aligned goals will be unlinked) • Performance Reviews & Review History • Career Plans • Development Plans • Received Feedbacks • Sent Feedback Requests	**Other Performance Data** • Business Goals • Projects • Sent Feedbacks • History of actions taken by the employee **Profile and Candidate Data** • General Profile (Education, Experience, Certifications, Preferences, etc) • Job Submissions • Offers **Talent Pools & Succession Plans** • Remains as member (now as an external candidate) **User Specific Data** • Remains in the system but inactive

Employee Information Deletion Rules

Employee-related information can be permanently deleted provided all of the following conditions are met:

- The Employee Status of the user account is Former Employee (this is typically achieved by deleting the user account (status: Deleted)).
- The employee must not be the owner manager of positions. A transfer of ownership is required prior to deletion.
- The employee must not be the owner of talent pools. A transfer of ownership is required prior to deletion.

Employee Information Deletion Process

Employee information deletion is a four step process:

1. User account deletion (see *Deleting a User Account From the User Account Page*, *Deleting the User Account of an Employee Using the Wizard* and *Deleting the User Account of an Employee Manually*).
2. Deletion task creation (see *Creating a Deletion Task*).

3. Preview of employees to be deleted (see *Previewing Employees to be Deleted*).
4. Execution of the deletion task (manually or, more often, automatically according to the date and frequency chosen by the administrator).

Limitations

- No archiving capabilities at this time.
- A user account cannot be permanently deleted from the system.
  - User accounts, once deleted, are no longer displayed but remain in the system.
  - The user accounts do not contain employee-related data.
- Products for which the data will not be automatically deleted by the employee information deletion task:
  - Learn
  - Evaluation Management
  - Assessment
  - Screening Services
  - Analytics
  - Any other external products integrated with Oracle Taleo Enterprise Edition

Deleting a User Account From the User Account Page

The Manage user accounts - Including HMRS fields user type permission is required..

Configuration > **[SmartOrg] Administration** > **User Accounts**

1. Locate the user in the User Accounts list.
2. Click Delete in the Actions column.
3. The action(s) you perform next vary depending on whether the user account is associated with an employee.
   - If the user account is associated with an employee who owns requisitions, templates or folders, or was assigned yet uncompleted actions, or reports to a manager, or has pending tasks or work items, perform the steps in the wizard.
   - If the user account is associated with someone for whom none of the previous conditions applies, click Yes.

Once deleted, the user account status is set to Deleted and the user account is deactivated.

To permanently delete employee data related to the employee, including employee metrics and all Performance data (as might be required in EMEA and other regions), see Employee Information Deletion Task.

Deleting the User Account of an Employee Using the Wizard

The Manage users - Including HMRS fields user type permission is required.

Configuration > **[SmartOrg] Administration** > **User Accounts**

1. Click the user account you want to disable.

2. In the Employee Information section, click Terminate.
   The wizard is displayed.
3. Perform the steps in the wizard.

The user account has Deleted status and therefore is no longer displayed on the User Accounts page if Active is selected in the View field. The Employee Status value is changed to Former Employee.

To permanently delete employee data related to the employee, including employee metrics and all Performance data (as might be required in EMEA and other regions), see Employee Information Deletion Task.

Deleting the User Account of an Employee Manually

The Manage users - Including HMRS fields user type permission is required.

Configuration > **[SmartOrg] Administration** > **User Accounts**

1. Click user account you want to disable.
2. Edit the Employee Information section as necessary.
3. Set employee status to Former Employee.
4. Provide a termination date.
5. Remove the manager.
6. Transfer direct reports to another manager if applicable.
7. Transfer ownership of talent pools and positions to another user.
8. Transfer pending tasks to another user.
9. Return to the User Accounts page, locate the user account in the list and click the corresponding Delete in the Actions column.
10. Click Yes.

Once deleted, the user account status is Deleted and the user account is deactivated.

To permanently delete employee data related to the employee, including employee metrics and all Performance data (as might be required in EMEA and other regions), see Employee Information Deletion Task.

Creating a Deletion Task

The Access Deletion Tasks permission is required (User Types > [Functional Domains] Configuration > Data Lifecycle Management).

Configuration > **Operations** > **Deletion Tasks**

1. Click Create.
2. Select Employees, click Next.
3. Select Permanently delete, click Next.
4. Click the check box next to each criterion you want to include and click Next.
5. Enter values for the Name, Code, Status, Start Date, Recurrence fields and click Next.
6. Review your selections and click Finish.

The task is displayed in the Tasks list. If you selected a date and frequency for the task, the task will run automatically on the dates that correspond to your selections.

Previewing Employees to be Deleted

The Access Deletion Tasks permission is required (User Types > [Functional Domains] Configuration > Data Lifecycle Management).

Configuration > **Operations** > **Deletion Tasks**

1. In the Task list, click the task you want to examine.
2. Click Count.
3. Click the *x out of y total items* link to view the list of former employees to be deleted.

Prevent Updating Internal System User

Customer administrator users cannot fully manage internal system users (such as Support and CS Synchronization).

Internal system users are protected and cannot be deleted or fully updated. Certain internal system user fields also cannot be updated.

Customer administrator users cannot access, view, update or delete protected internal system users and certain related fields. This feature is not visible to customers except when error messages are generated as a result of having attempted to update or delete protected internal system users and fields.

Filter Out Internal Users

Internal users are filtered out of User Exports. Internal users were filling the user export list where the Customer only needs to see standard users.

Internal users are dedicated technical users required by the application to work properly.

Note: Only support users can see Internal users in SmartOrg.

System User Check Box

The System User check box is only visible to system users when they are managing other users.

The System User check box is available in SmartOrg Administration, in the Personal Information section of user accounts.

3 Organizational Structure Administration

Working with OLFs

Fundamental Data Structure: Organization-Location-Job Field (OLF)

The data structure enables each customer to customize Oracle Taleo Enterprise Edition products such that they reflect how the customer does business. Each customer's organization is defined as a combination of three main elements: Organizations, Locations, Job Fields (OLF). OLF is also referred to as contextualization.

Organization describes the hierarchical structure of an organization. Up to 20 organization levels can be created. The system proposes the following organization structure, but other terms may be chosen to better reflect the hierarchical structure of a company:

- Company
- Sector
- Department
- Division

Location represents a geographical area, such as a country or state. Locations are listed in a hierarchical order, from the broadest geographical area (often a country) to increasingly specific areas (work location). Up to 5 location levels can be created. Locations must be associated to network locations used for various purposes, mainly integration with external systems, using a common and standard universal structure. Oracle strongly recommends defining a zip code for the location. A common location structure is:

- Country
- State/Province
- Region
- City
- Work Location

Worker locations can be mapped to the Location structure. The worker location is used as an employee (post-hire) function whereas the location (in OLF) is meant for recruiting purposes. For example, a location could be 100 Main Street and a worker location could be "Sector 44" or "Cubicle A". Worker locations are not created in Configuration. Worker locations are typically imported from an external HRMS system. Once worker locations are imported, worker locations can be mapped to the Location structure via Integration or by the system administrator in Configuration. Any Location element can be given the Worker Location and the Worker Location Address properties. System administrators can then configure worker locations to appear in requisitions, offers, correspondences, requisitions lists, and candidates lists just like any other fields. For details, see Worker Location.

Job Field represents the employment sectors or domains. Up to 4 job field levels can be created. Job fields must also be mapped to the network job fields, again to have a common language with the external world, be for posting or integrations. This mapping also serves to inherit existing classification for competencies. The system proposes the following job field structure, but other terms may be chosen to better reflect the structure of a company:

- Category
- Function
- Specialty

Contextualization, that is the Organization-Location-Job Field structure associated to an element, represents the framework the application uses to organize, classify, link, match or search for information in the application. Although Organization-Location-Job Field structures are configured with the help of an Oracle representative during the implementation phase, modifications to structure elements can be done in maintenance mode at any time. It is possible to customize the system to reflect a company's unique structure and make modifications to Organization-Location-Job field elements in real time so that the data accounts for any changes in the structure.

There are several key elements of the Oracle Taleo Enterprise Edition products that are tied to the Organization-Location-Job field structure such as candidate selection workflows, requisitions and requisition templates, message templates, user management, prescreening, approvals, etc.

The purpose of contextualizing an element is to make the element relevant according to a specific context. Below is an example of contextualization with candidate selection workflows. The CSW1 would not be available to the user for this requisition, because the last level of its Location does not match that of the requisition. The CSW2 could be available to the user for this requisition. The parent element of the lowest level of the requisition for each dimension (Organization, Location or Field) must be the same as the lowest level of the workflow for each dimension.

Example:
Requisition:

- Organization: Urban transportation
- Location: United States/California/Los Angeles
- Job Field: Bus driver

CSW1:

- Organization: Urban transportation
- Location: United States/California/San Jose
- Job Field: Bus driver

CSW2:

- Organization: Urban transportation
- Location: United States
- Job Field: Bus driver

When using contextualization, the system applies the AND operator between Organizations, Locations and Job Fields entities. However, the OR operator is applied between elements of the same entity.

In the following example, a field would be displayed if Canada (or any of its children) AND Architecture were selected.

- Location: Canada
- Job Field: Architecture

In the following example, a field would be displayed if Canada AND Architecture were selected, or if United States AND Architecture were selected.

- Location: Canada
- Location: United States
- Job Field: Architecture

Mapping

Mapping is essential to the Organization, Location, and Job Field (OLF) concept because it allows the creation of an association between a custom element and a standard element from an external system.

Through mapping, it is possible to organize and exchange data between two or more systems in a compatible format. Mapping locations, for example, helps the application to communicate location information to job boards when posting a requisition. The two systems agree that the data structure location will represent a geographical place such as a country, a state or a city. The systems are then able to swap information based on a mutually comprehensible data exchange agreement.

Structure Management

The Structure Editor lets you create and delete organization, location, and job field levels according to your organization's needs. The structure that you establish in the Structure Editor will form the basis of the Organizations, Locations, and Job Fields throughout the application.

OLF Location Geocoding

When the OLF Location element is created or edited and the ZIP code is provided, the Location element is automatically geocoded.

The latitude and longitude is populated for the created or edited location element when done in the SmartOrg UI or by integration.

Creating the Organization-Location-Job Field Structure

The *Manage Foundation Data* user type permission is required.

The application must be in implementation mode or maintenance mode.

Configuration > **[SmartOrg] Administration**

1. Click Structure Management under Organizations, Locations or Job Fields.
2. Click Edit.
3. Click Create to add levels.
4. Enter a description for each level.
5. Translate the description into every supported content language.

6. In the Displayed column, select the levels that you want to display to the user.

   For organizations and job fields, the levels must be displayed in sequence. For example, you can choose to display levels 1 to 3 and not 4, but you cannot display 1, 2, 4, but not 3.

7. Click Save.

Adding a Level to the Organization-Location-Job Field Structure

The *Manage Foundation Data* user type permission is required.

The application must be in implementation mode or maintenance mode.

Configuration > **[SmartOrg] Administration**

1. Click Structure Management under Organizations, Locations or Job Fields.
2. Click Edit.
3. Click Create to add levels.
4. Enter a description for each level.
5. Translate the description into every supported content language.
6. In the Displayed column, select the levels that you want to display to the user.

   The levels must be displayed in sequence. For example, you can choose to display levels 1 to 3 and not 4, but you cannot display 1, 2, 4, but not 3.

7. Click Save.

Editing a Level in the Organization-Location-Job Field Structure

The *Manage Foundation Data* user type permission is required.

To edit the description of a level, the system must be in maintenance mode.

To edit which levels are displayed, the system must be in implementation mode or maintenance mode.

Configuration > **[SmartOrg] Administration**

1. Click Structure Management under Organizations, Locations or Job Fields.
2. Click Edit.
3. Make required changes.
4. Click Save.

Deleting a Level in the Organization-Location-Job Field Structure

The *Manage Foundation Data* user type permission is required.

The application must be in implementation mode or maintenance mode.

If you want to delete a level in the Organization structure, you must first move elements that are attached to it to another level. You cannot delete levels if elements are linked to the level.

Configuration > **[SmartOrg] Administration**

1. Click Structure Management under Organizations, Locations or Job Fields.
2. Click Edit.

3. Click Delete next to the desired level.

Element Management

The Element Management feature allows a system administrator to view the properties of the Organizations-Locations-Job Fields structure and to manage their children.

Creating an Element for the Organization-Location-Job Field Structure

The *Manage Foundation Data* user type permission is required.

The application must be in implementation mode or maintenance mode.

Entering a sequence number will overwrite the default alphabetical sequencing available in the system.

For an element to be active, all of its parents must be active. If not, the Active (Pending) status will appear in the Status column.

Configuration > **[SmartOrg] Administration**

1. Click Element Management under Organizations, Locations or Job Fields.
2. Click Create next to Children.
3. Complete the fields.
4. Click Save.

Editing an Element in the Organization-Location-Job Field Structure

The *Manage Foundation Data* user type permission is required.

The application must be in implementation mode or maintenance mode.

Configuration > **[SmartOrg] Administration**

1. Click Element Management under Organizations, Locations or Job Fields.
2. Click Edit in the Actions column.
3. Make the required changes.
4. Click Save.

Moving an Element in the Organization-Location-Job Field Structure

The *Manage Foundation Data* user type permission is required.

The application must be in implementation mode or maintenance mode.

Configuration > **[SmartOrg] Administration**

1. Click Element Management under Organizations.
2. In the list of Children, select the element that you want to move.
3. Click Move.
4. Specify under which organization you want to move the selected element.
5. Click Save.

Deleting an Element

The *Manage Foundation Data* user type permission is required.

The application must be in implementation mode or maintenance mode.

Configuration > **[SmartOrg] Administration**

1. Click Element Management under Organizations, Locations or Job Fields.
2. In the list of Children, select the desired element.
3. Click Delete.

   If the organization, location or job field that you want to delete has elements, you must reassign the elements to another organization, location or job field. Click OK in the message box. When the selector opens, you can reassign the elements by selecting a new organization, location or job field. All the elements (templates, requisitions and candidates) associated to the organization, location or job field are now reassigned to the organization, location or job field selected above.

Adding an Element to the Location or Job Field Structure

The *Manage Foundation Data* user type permission is required.

The application must be in implementation mode or maintenance mode.

Configuration > **[SmartOrg] Administration**

1. Click Element Management under Organizations, Locations or Job Fields.
2. Click Add next to Children.
3. Select the desired element.
4. Click Select.

Element Deactivation

Over time, Taleo clients might need to deactivate or reactivate certain Organization-Location-Job Field elements in SmartOrg to ensure that the foundation data structure reflects changes to their business process structure.

Reports mention whether the status of an Organization-Location-Job Field element is Active or Inactive. In addition, if you deactivate Organization-Location-Job Field elements, they are no longer displayed in the Recruiting Center but if elements or users are part of requisitions, templates, questions, tasks, candidates, etc. and the elements or users are deactivated afterward, that information is retained for reporting purposes.

If a parent Organization, Location, or Job Field element is deactivated or reactivated, all child elements are updated to have the same state as the parent element.

If an Organization-Location-Job Field element is part of a record (e.g., requisition or candidate file) and the element is deactivated, the system continues to display the element in the record. The Organization-Location-Job Field element is not displayed, however, in Organization-Location-Job Field selectors (e.g., Location Selector) if a user creates a new record or edits an existing one. Recruiting Center users can delete a deactivated Organization-Location-Job Field element from an existing record.

Deactivation is available via Taleo Connect Client (TCC). This can be done by changing the status of the Organization-Location-Job Field element.

Deactivating an Organization, Location or Job Field Element

The *Manage Foundation Data* user type permission is required.

Before you deactivate an Organization-Location-Job Field element, you should carefully review all associated objects (that is, requisitions, message templates, agencies, etc.) and assign a different Organization-Location-Job Field element to each object if necessary.

Configuration > **[SmartOrg] Administration**

1. Click Element Management under Organizations, Locations or Job Fields.
2. If the element you want to deactivate is displayed in the list of Children, click the corresponding Deactivate in the Actions list.
    - If the element is at a lower level, you can drill down to the appropriate level by clicking the element description in the Description list and then click the corresponding Deactivate.
3. Click OK.

Deactivating an Organization, Location or Job Field Element While Displayed

The *Manage Foundation Data* user type permission is required.

Before you deactivate an Organization-Location-Job Field element, you should carefully review all associated objects (that is, requisitions, message templates, agencies, etc.) and assign a different Organization-Location-Job Field element to each object if necessary.

Configuration > **[SmartOrg] Administration**

1. Click Element Management under Organizations, Locations or Job Fields.
2. If the element you want to deactivate is displayed in the list of Children, click the corresponding the element description in the Description list.
3. Click Deactivate next to the element description near the top of the following page.
4. Click OK.

Organization-Location-Job Field Behavior of Deactivated Elements

Context	Action	Organization-Location-Job Field behavior if element is deactivated
Agency		
Agency	View	Not displayed
Agency	Edit	Not displayed
Agency	Add	Not displayed
Agency - generate new posting	Add	Not displayed
PDF Form		
Any future object configuration such as PDF Forms or Screening Services with Organization-Location-Job Field context	Add	Not displayed
Any future object such as PDF Forms or Screening Services with Organization-Location-Job Field context	View	Not displayed
Any future object such as PDF Forms or Screening Services with Organization-Location-Job Field context	Edit	Not displayed
Automated Tasks for defined Organization-Location-Job Field contexts		
Automated Tasks for defined Organization-Location-Job Field contexts	View	Displayed to support historic data integrity
Automated Tasks for defined Organization-Location-Job Field contexts	Edit	Displayed if current/historic data selected (to allow re-saving and viewing without affecting data integrity)
Automated Tasks for defined Organization-Location-Job Field contexts	Add	Not displayed
Candidate File		

Context	Action	Organization-Location-Job Field behavior if element is deactivated
Candidate File	View	Displayed to support historic data integrity
Candidate File	Edit	Displayed if current/historic data selected (to allow re-saving and viewing without affecting data integrity)
Candidate File	Create	Not displayed
Candidate Search - New search Organization-Location-Job Field preferences		
Candidate Search - New search Organization-Location-Job Field preferences	Other	Not displayed
Candidate Search - Run saved search with Organization-Location-Job Field preferences	View	Not displayed
Candidate Search - Run saved search with Organization-Location-Job Field preferences	Edit	Not displayed
Candidate Search - Run saved search with Organization-Location-Job Field preferences	Add	Not displayed
Career Sections Organization-Location-Job Field		
Career Sections Organization-Location-Job Field association	View	Not displayed
Career Sections Organization-Location-Job Field association	Edit	Not displayed
Career Sections Organization-Location-Job Field association	Add	Not displayed
Career Sections URL		
Career Sections URL	View	Displayed
Career Sections URL	Edit	Displayed
Career Sections URL	Add	Not displayed
Correspondence		
Correspondence in Administration menu	View	Not displayed

Context	Action	Organization-Location-Job Field behavior if element is deactivated
Correspondence in Administration menu	Edit	Not displayed
Correspondence in Administration menu	Add	Not displayed
Disqualification Questions		
Disqualification Library	View	Not displayed
Disqualification Library	Edit	Not displayed
Diversity Forms	Add	Not displayed
Large User Defined Selections (LUDS)		
LUDS	View	Not displayed
LUDS	Edit	Displayed if current/historic data selected (to allow re-saving and viewing without affecting data integrity)
LUDS	Add	Not displayed
Offer Data		
Offer Data	View	Displayed to support historic data integrity
Offer Data	Edit	Displayed if current/historic data selected (to allow re-saving and viewing without affecting data integrity)
Offer Data	Create	Displayed if current/historic data selected (to allow re-saving and viewing without affecting data integrity)
Prescreening Questions		
Prescreening Library	View	Not displayed
Prescreening Library	Edit	Not displayed
Prescreening Library	Add	Not displayed

Context	Action	Organization-Location-Job Field behavior if element is deactivated
Privacy Agreements		
Privacy agreements configuration	View	Not displayed
Privacy agreements configuration	Edit	Not displayed
Privacy agreements configuration	Add	Not displayed
Reports		
Reporting - Running Reports	Other	Indicated as "inactivated" in the listing
Requisitions		
Requisition file data	View	Displayed to support historic data integrity
Requisition file data	Edit	Displayed if current/historic data selected (to allow re-saving and viewing without affecting data integrity)
Requisition file data	Create	Not displayed
Requisition tree view in Recruiting	Filter	Not displayed
Requisition filter by Manager or Recruiter	Filter	Not displayed
Requisition Templates		
Requisition Templates	View	Indicated as "inactivated" in the listing
Requisition Templates	Edit	Not displayed
Requisition Templates	Create	Not displayed
Automated Tasks		
Run automated tasks for defined Organization-Location-Job Field contexts	Other	Displayed to support historic data integrity
SmartOrg - Organization-Location-Job Field		
SmartOrg - Organization-Location-Job Field	View	Invalid; system doesn't allow

Context	Action	Organization-Location-Job Field behavior if element is deactivated
SmartOrg - Organization-Location-Job Field	Edit	Not displayed
SmartOrg - Organization-Location-Job Field	Create	Not displayed
SmartOrg - User		
SmartOrg - User Admin	View	Invalid; system doesn't allow
SmartOrg - User Admin	Edit	Not displayed
SmartOrg - User Admin	Create	Not displayed
Sources		
Source.Tracking config/admin	View	Not displayed
Source.Tracking config/admin	Edit	Not displayed
Source.Tracking config/admin	Add	Not displayed
User Groups		
User Groups	View	Indicated as "inactivated" in the listing
User Groups	Edit	Not displayed
User Groups	Add	Not displayed
User Groups - access to candidate/requisition data per segmentation rules	Other	Indicated as "inactivated" in the listing
Departments		
Departments	View	Displayed
Departments	Edit	Displayed
Departments	Add	Not displayed
Work Locations		

Context	Action	Organization-Location-Job Field behavior if element is deactivated
Work Locations	View	Indicated as "inactivated" in the list
Work Locations	Edit	Not displayed
Work Locations	Add	Not displayed
Performance Flex GUI - Employee		
Performance Flex GUI - Employee	View	Displayed to support historic data integrity
Performance Flex GUI - Employee	Create	Not displayed
Performance Flex GUI - Employee	Edit	Displayed
Performance Flex GUI - Position		
Performance Flex GUI - Position	View	Displayed to support historic data integrity
Performance Flex GUI - Position	Create	Not displayed
Performance Flex GUI - Position	Edit	Not displayed
Performance Flex GUI – Job Role (Career)		
Performance Flex GUI - Job Role (Career)	View	Displayed to support historic data integrity
Performance Flex GUI – Job Role (Career)	Create	Not displayed
Performance Flex GUI – Job Role (Career)	Edit	Not displayed
Performance Flex GUI – Business Organization		
Performance Flex GUI – Business Organization	View	Displayed to support historic data integrity
Performance Flex GUI – Business Organization	Create	Not displayed
Performance Flex GUI – Business Organization	Edit	Not displayed

Working with Business Organizations

Business Organization Structure Management

The Business Organizations section in the SmartOrg page is only available to customers who have purchased Performance.

Creating Levels in the Business Organization Structure

A maximum of three levels can be created.

The description must be translated into every supported content language.

Configuration > **[SmartOrg] Administration** > **Business Organizations** > **Structure Management**

1. Click Edit.
2. Click Create.
3. Complete the required fields.
4. Click Save.

Editing the Business Organization Structure

The application must be in Maintenance Mode.

Configuration > **[SmartOrg] Administration** > **Business Organizations** > **Structure Management**

1. Click Edit.
2. Make the required changes.
3. Click Save.

Deleting a Business Organization Level

The application must be in Maintenance Mode.

If elements are associated to a level, the level cannot be deleted

Configuration > **[SmartOrg] Administration** > **Business Organizations** > **Structure Management**

1. Click Edit.
2. Click Delete in the Actions column.
3. Click Save.

Business Organization Element Management

The Element Management feature allows you to view the properties of the business organizations and to manage their children.

Editing a Business Organization Element

The application must be in Maintenance Mode.

Configuration > **[SmartOrg] Administration** > **Business Organizations** > **Element Management**

1. Click Edit in the Actions column.
2. Make the required changes.
3. Click Save.

Creating a Child for the Business Organization

The application must be in Maintenance Mode.

Configuration > **[SmartOrg] Administration** > **Business Organizations** > **Element Management**

1. Click Create.
2. Complete the New Business Organization page.
3. Click Save.

The child is added to the list of children.

Moving a Child to Another Business Organization

The application must be in Maintenance Mode.

Configuration > **[SmartOrg] Administration** > **Business Organizations** > **Element Management**

1. Click Move in the Actions column of the child you want to move.
2. Specify under which business organization you wish to move the selected element.
3. Click Save.

Activating a Child

Configuration > **[SmartOrg] Administration** > **Business Organizations** > **Element Management**

1. Click Activate in the Actions column of the child you want to activate.
2. Click OK.

The status of the child changes to Active.

Editing a Child

The application must be in Maintenance Mode.

Configuration > **[SmartOrg] Administration** > **Business Organizations** > **Element Management**

1. Click Edit in the Actions column of the child you want to edit.
2. Make the required changes.
3. Click Save.

Deactivating a Child

Configuration > **[SmartOrg] Administration** > **Business Organizations** > **Element Management**

1. Click Deactivate in the Actions column of the child you want to deactivate.
2. Click OK.

The status of the child changes to Inactive.

Deleting a Child

The application must be in Maintenance Mode.

Elements with children cannot be deleted.

Configuration > **[SmartOrg] Administration** > **Business Organizations** > **Element Management**

1. Click Delete in the Actions column of the child you want to delete.
2. Click OK.

4 Competency Administration

Working with Competencies

Competency

A competency is a knowledge, skill or ability.

Competencies are contained in the Taleo competencies list, and are configured for use in Performance. Taleo competencies can be mapped to job roles and ratings criteria used in performance reviews and succession planning. There are three types of competencies in the Taleo competencies list.

- Job skills
- Language skills
- Behavioral competencies

By default each competency is associated with one of those three types, however, there will be instances where the Taleo default settings do not completely align with how an organization views a competency. In this instance you can override the default competency type association with one of the other types.

A competency can be assessed across one or more dimensions (for example, Last Used, Experience). A separate scale of values is associated with each dimension.

You can add custom competencies not included in the Taleo standard competencies list. This is made possible by your default provider code (CUSTOMER_PROVIDER). For more information see *Custom Competency Management*.

It is also possible to use competencies provided by another vendor. For more information see *Third Party Competency Support*.

To edit and activate a competency for use in your organization, it is recommended that you perform the following tasks in the order they appear here:

1. Create and activate your rating models.
2. Create and activate your competency contexts.
3. Create and activate your competency definition context.
4. Create and activate competency groups and categories and associate them to competencies to provide users with various refining options.
5. Edit and activate a competency.
6. Create a guidance plan for the competency.

Detailed instructions for each of these tasks are documented in separate sections.

Editing a Competency

You edit a competency when you want to: modify its alias, description or type; add, change or remove its contextual definitions, competency contexts or sub-competencies; change the competency's rating model (provided the rating model has never been used in any performance review, job role, job profile classification or position).

To edit competency information, the status of the competency must be Draft or Inactive.

If you want to create a new competency definition and add a competency definition context, you must create the latter prior to adding it to a definition. See *Creating a Competency Definition Context*.

If you want to add a competency context, you must create it prior to adding it to a competency.

If you want to assign a new rating model, you must create it prior to adding it to a competency. New rating models may not be added to competencies that have been used in a review with a prior rating model. See *Creating a Rating Model*.

Configuration > **[Competencies] Competencies**

1. In the Competency Management page, click the name of the competency you want to edit. (Alternatively, use the Refine by list to locate the competency more quickly.)
2. If the status of the competency is Active, in the Actions column, click the corresponding Deactivate to make the information editable.
3. Select the language in which you want to make the modifications.
4. You can perform any of the following actions.
    - To change the competency's alias, description or competency type, click Edit next to Properties and make your changes in the Competency Editor page.
    - To make changes to the competency's definitions, click Create next to Definitions to create a new definition or click Edit next to an existing definition to modify the latter.
    - To make changes to the competency's contexts, click Add next to Competency Contexts to add a new context or click Delete next to an existing context to remove it from the list of contexts.
    - To assign a different rating model to the competency, click Edit next to Rating Model to select a new rating model. This change will be possible only if the current rating model has **never** been used in a performance review, job role, job profile classification or position.
    - To make changes to the competency's sub-competencies, click Create next to Sub-Competencies to create new sub-competencies, Reorder next to Sub-Competencies to reorder the current sub-competencies, or Edit next to an existing sub-competency to modify the latter's name.
5. To make the competency available for selection when adding to reviews or job profiles, click Activate next to the competency's name. Alternatively, you can leave the status as Draft (the competency will remain unavailable for selection) and activate the competency at a later time.

The Competency page automatically displays all your changes.

Adding a Context-Specific Definition to a Competency

A competency might need to be defined differently for different SmartOrg elements in your organization. You can create multiple competency definitions for a single competency and assign each one to a specific Foundation Data element in SmartOrg.

If you plan to assign a competency definition context to a competency definition, you have to first create the context and activate it in separate operations. See *Creating a Competency Definition Context* and *Activating a Competency Definition Context*.

Configuration > **[Competencies] Competencies**

1. In the Competency Management page, locate the competency you want to edit and then click its name. (Alternatively, use the Refine by list to locate the competency more quickly.)
2. Click Create next to Definitions.
3. In the Competency Definition field, enter the definition you want the system to display to the employees of a specific SmartOrg element in your organization.
4. Click Search next to the Competency Definition Context field, click the radio button next to the context you want to select and then click Select.
5. Click Save.

The definition is displayed in the Definitions section of the Competency Editor page.

You can add a competency context to the competency if you want.

Editing a Competency's Definition

You can create, edit or delete any context-specific definition associated with a competency.

Configuration > **[Competencies] Competencies**

1. In the Competency Management page, locate the competency you want to edit and then click its name. (Alternatively, use the Refine by list to locate the competency more quickly.)
2. If the status of the competency is “Draft” or “Inactive”, proceed immediately to the next step. If you have already activated the competency (its status is “Active”), click Deactivate next to the name of the competency or next to the language list.
3. To add a context-specific definition, click Create in the Definitions section, enter a definition and a context, and then click Save. Repeat this step for each definition and context you want to add.
4. To edit a definition or context, click the corresponding Edit in the Actions column of the Definitions section, enter your changes and then click Save.
5. To delete a definition, click the corresponding Delete in the Actions column of the Definitions section and then click Yes to confirm the action.
6. If you deactivated the competency earlier and have no other changes to make, click Activate to make the competency available to employees for selection. If the current status is “Inactive” and you want to make other changes, for example, modify the competency contexts, make all the changes before clicking Activate.

The changes you made are reflected in the information displayed on the Competency Editor page.

If you have not already done so, you should activate the competency.

Activating a Competency

Activating a competency makes the competency available to employees so they can add it to their talent profile, and to managers so they can add it to performance reviews. All competencies have “Draft” status by default and are therefore unavailable to employees and managers.

Ensure that the following steps (if applicable to the competency) are completed and that all the information is correct before you activate a competency. If competency is activated and it contains a rating model, the latter can only be changed later if it has not been included in performance reviews, job roles, job profile classifications and positions.

- Edit the competency's properties and description.
- Add context-specific definitions if desired.
- Add competency contexts if desired.
- Add a rating model if desired.
- Add sub-competencies if desired.

Configuration > **[Competencies] Competencies**

1. On the Competency Management page, locate the competency you want to activate. (Alternatively, use the Refine by list to locate the competency more quickly.)
2. In the Actions column, click the corresponding Activate.

On the Competency Management page, in the Competencies list, Active is displayed in the Status column and Activate is no longer displayed in the Actions column.

The competency can no longer be edited or deleted.

Employees can now view and add the competency provided they are part of one of the Foundation Data elements (in SmartOrg) specified in the Competency Contexts section of the competency. If no Foundation Data elements are specified, the competency can be viewed and selected by all employees.

The competency is available for use in job roles, positions and performance reviews.

You can create a guidance plan for the competency if you want.

Third Party Vendor Competency Support

While Taleo provides a robust and comprehensive competencies library with each implementation, customers may use also choose to use their own competencies or those they obtain from third-party providers as well.

This provides customers the ability to choose from a wide range of competency options for their users.

> **Note:** Third party integration with competency library providers DDI and PDI, through Service Activation Request with Taleo Support, is no longer supported as of Feature Pack 12B.

System administrators can import competencies using Taleo Connect Client (TCC) integration. They can also use the Configuration module to configure individual competencies within the library to be displayed. On the Competency Management page, the Provider column indicates whether the competency is provided by Taleo or the customer. When customers import or configure their own content they have obtained from a partner, it is seen as coming from the customer as the provider, not the partner.

In a system with multiple sources, when viewing the competencies for an employee in their talent profile, you can mouse over the name of the competency to see the name of the provider and competency. If a description is included with the competency, then an info bubble is available including the vendor name, competency name and description. This provides a simple way for you to identify the source of the competency.

Custom Competency Management

As of Feature Pack 13B, customers can now manage their custom competency library as a self service, either directly in the SmartOrg UI or through Taleo Connect Client (TCC) integration. Service requests are no longer necessary.

An active custom provider code (CUSTOMER_PROVIDER) is delivered, which allows your organization to create custom competencies in SmartOrg (Navigation: Configuration > [Competencies] Competency Providers > [Competency Provider Management]). It is active by default. Foundation Data Management permission is required for a user to manage custom competencies in SmartOrg.

The competency library provides the ability to filter competencies by provider. On the Competency Management page, in Refine By select Competency Provider, and choose the custom provider to display custom competencies only (Navigation: Configuration > [Competencies] Competencies > [Competency Management]).

When Creating a new competency at least a code, a name, and a rating model must be provided.

Once the custom competency is created, the competency can be used the same as other Taleo standard competencies. You can assign the following attributes:

- Contextual competency definitions
- Rating model
- Competency contexts
- Categories & Groups
- Sub competencies
- Network Locations (new!)

Competency Fields

All fields related to Competencies 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 header.

Field	Description	Applicable to	Header
Actions	Actions that you can currently perform. For example, if a competency has Draft status, the Actions column typically has an Activate icon you can click to activate the competency.	Competencies	
Activate	You click Activate when you want to change an item's status from Draft to Active. While a competency, rating model, etc. has Draft status, it can be edited but it is unavailable to users. After the status is changed from Draft to Active, a competency, rating	Competencies	

Field	Description	Applicable to	Header
	model, etc. is available but the item can no longer be edited or deleted.		
Add	You click Add to add an instance of an item (for example, if you want to add a competency context to a competency).	Competencies	
Alias	You can assign an alias to a competency. An alias enables you to provide a term for a competency that is better suited to your organization's needs.	Competencies	Properties
By	The person or group who initiated the event.	Competencies	
Cancel	If you don't want to save the changes you've made on the current page, click Cancel. The system typically displays the previous page.	Competencies	
Code	A unique code associated with an item.	Competencies	Properties
Competency Category	Competency categories associated with the competency. A competency can be associated with multiple categories. Categories must have been created and activated to be available for selection. Categories provide filtering options when searching for competencies.	Competencies	Competency Categories
Competency Context	Uses SmartOrg elements to limit who can view a specific competency and add it to a talent profile.	Competencies	Competency Context
Competency Definition Context	The context-specific definition is only displayed to employees who are part of the SmartOrg element specified in this field.	Competencies	Definitions
Competency Group	Group to which the competency is associated. Groups must have been created and activated to be available for selection. Groups provide filtering options when searching for competencies.	Competencies	Properties
Competency Type	The competency types are: Behavioral, Job-specific and Language. This option is used to override the default competency type.	Competencies	Properties
Create	To create an instance of an item, click Create.	Competencies	

Field	Description	Applicable to	Header
Date and Time	The date and time that an event occurred regarding a competency. For example, the date and time when a sub-competency was added.	Competencies	
Default Competency Type	The default competency type is a static value and serves as a reference if the type is changed.	Competencies	Properties
Definitions	The definition that is displayed to users who are part of a particular SmartOrg element.	Competencies	Definitions
Delete	To remove an item, click Delete. This action cannot typically be undone afterward.	Competencies	
Description	The competency description that is displayed if no definitions are configured in the Definitions section.	Competencies	Properties
Details	Additional information about an event that occurred regarding a competency.	Competencies	
Edit	If you want to edit information and the item (competency, rating model, etc.) is in Draft status, you can click Edit.	Competencies	
Event	An action that was performed regarding a competency. For example, if you add a sub-competency, the event is logged in the History section.	Competencies	
Hide	If you don't want to view the information in a particular section, you click the corresponding Hide.	Competencies	
History	This section displays a listing of all events that have occurred regarding an item. For example, the date and time when a competency definition was added to a competency. The History section also indicates the name of the event, a short description and the name of the person or group who initiated the event.	Competencies	
Internal Code	Alternate code assigned to the competency.	Competencies	Properties
Language	Presents a pull-down menu from which you can select one of the activated languages to view the page information in that specific language.	Competencies	

Field	Description	Applicable to	Header
More	To see additional information, click More.	Competencies	
Name	The name of the item (competency, rating model, etc.).	Competencies	Properties
Organizations	The organization with which the definition is associated.	Competencies	
Provider	The source of the competency. By default Taleo's competency library is included with each implementation, but customers may also use their own competencies as well as those obtained from third party providers.	Competencies	Properties
Rating Model (Code and Name)	All competencies cannot be measured using the same metrics. Rating Model (Code and Name) displays the name of the rating model used to evaluate the competency.	Competencies	Rating Models
Refine by	You can limit the items displayed in a list to those that correspond to a criterion.	Competencies	
Refresh	If you change a value in a field that has a Refresh icon next to it and then click Refresh, information on the page is updated to reflect the change.	Competencies	
Save	To save your changes, click Save.	Competencies	
Search	If Search is next to a field, you can click Search and the system will display all of the choices available for that field	Competencies	
Select	After making selections in a list, you click Select to confirm your selections.	Competencies	
Status	The status of the item (competency, rating model, etc.). If the competency has Draft status, it can be edited. If it has Active status, it has been activated for use in the system and it can no longer be edited.	Competencies	Properties
Sub-competencies	The list of sub-competencies, which are subsets or components of the competency.	Competencies	

Working with Competency Groups

Competency Group

Competency groups provide the ability to classify competencies to ease filtering.

Competency groups provide an additional way of organizing competencies. Competencies groups can be defined by clients and associated to competencies. Groups are used for filtering and display purposes. It is not mandatory to assign a group to a competency and if no group is associated to a competency, the default Other Competencies group is used.

A competency can be associated to only one group.

Once created and activated, a competency group can be assigned to a competency. The competency group is selected when defining or editing the properties of a competency.

Competency groups are also used in Talent Profile as there is setting that offers the choice of displaying competencies by groups or types. When the display by group is selected, all competencies will show according to their associated group, or under the Other Competencies section for those not associated to a specific group.

When searching for a competency, the competency selector offers a filter by group, to show only competencies of the selected group, therefore reducing the number of results and facilitating selection.

Configuration

For the competency selector to offer filtering options by group, the groups must first be defined and activated by the administrator via **Configuration** > **[Competencies] Competency Groups** . Once defined, a specific group can be set for a given competency via **Configuration** > **[Competencies] Competencies** .

Location	Description
Configuration > **[Competencies] Competency Groups**	To define and edit available competency groups.

Setting	Description	Location
Talent Profile Competency Grouping	This setting provides the ability to determine how competencies are to be presented in the Talent Profile, that is either by type or by group	**Configuration** > **[Taleo Performance] Settings** where Category = Global Settings

Creating a Competency Group

Creating a competency group provides the ability to define the properties of the groups that will be used to classify competencies.

The user must have administration permissions and access to competency management.

Configuration > **[Competencies] Competency Groups**

1. In the **Competency Group Management** page, click **Create** next to **Competency Groups**.
2. In the **New Competency Group** page, provide a unique code and name for the group and enter a description as needed.
3. Click **Save**.

   If more than one language has been configured, you will need to provide a name for all configured languages and save each one individually.

The system creates a new competency group for the language currently in context, that is for the base language, and for all other active languages.

For the newly created competency group to be available for selection when you want to assign a competency group to a competency, you need to activate the competency group.

Associating a Group to a Competency

This task allows the user to associate a group to a specific competency in order to classify competencies.

The user must have administration permissions and access to competency management.

The competency must be in a draft or inactive status to be edited, and to assign a competency group.

Configuration > **[Competencies] Competencies**

1. In the **Competency Management** page, click the name of the competency to which you want to assign a competency group.
2. In the **Competency** page, click **Edit** next to **Properties**.

   If the Edit link is not available, this means that the competency is active and cannot be edited; to make a change, you will first need to deactivate the competency.

3. In the **Competency Editor** page, click Search next to the **Competency Group** field.
4. Make your choice inn the **Competency Selector** page and click **Select**.
5. Click **Save** to register your change.
6. If the competency was previously active and you deactivated it, make sure to activate it again.

The selected competency group will be associated to the competency.

Deleting a Competency Group

Deleting a competency group removes the group from the list of competency groups.

The user must have administration permissions and access to competency management.

If the competency group is associated to a competency, whether active or inactive, deletion will not be permitted.

Configuration > **[Competencies] Competency Groups**

1. In the **Competency Group Management** page, locate the competency group to delete and click **Delete** under **Actions**.
2. Confirm the deletion.

If the competency group is not associated to any competency, the deletion will be done. However, if the competency group is associated to any competency in the system, a message informs you that the operation is not possible.

Competency Group Fields

The following table presents a list of all fields related to competency groups in Performance Administration. Each entry in the table includes the field name, a description, possible values (when they are predefined), the part of the application to which the field applies and the field's section header.

UI Element	Description	Applicable to	Header
Code	Unique code assigned to the competency group.	Competency Groups	Properties
Name	Name of the competency group.	Competency Groups	Properties
Description	Description of the competency group.	Competency Groups	Properties
Status	Status of the competency group, which can be Draft, Active or Inactive. Only active competency groups will be available as filters when searching for competencies.	Competency Groups	Properties

Working with Competency Categories

Competency Category

Competency categories provide an additional way of classifying competencies, therefore facilitating competency search.

Competency categories provide a new way of organizing competencies. The available categories are configurable and defined by the client. When required, a competency can be associated with one or more categories. The classification of competencies by categories is only used for searching and filtering purposes and is only available in Performance.

A competency can be associated to multiple categories.

When searching for a competency, the competency selector offers a filter by category, to show only competencies of the selected category, therefore reducing the number of results and facilitating selection.

Configuration

For the competency selector to offer filtering options by category, the categories must first be defined and activated by the administrator via **Configuration** > **[Competencies] Competency Categories** . Then, competencies can be added to the desired categories.

Location	Description
Configuration > **[Competencies] Competency Categories**	To define and edit available competency categories.

Creating a Competency Category

Creating a competency category provides the ability to define the properties of categories to assigned competencies to.

The user must have administration permissions and access to competency management.

Configuration > **[Competencies] Competency Categories**

1. In the **Competency Category Management** page, click **Create** next to **Competency Categories**.
2. In the **New Competency Category** page, provide a unique code and name for the category and enter a description as needed.
3. Click **Save**.

   If more than one language has been configured, you will need to provide a name for all configured languages and save each one individually.
4. Add the desired competencies to the category by clicking **Add** next to **Competencies**.

The system creates a new competency category for the language currently in context, that is for the base language, and for all other active languages.

For the newly created competency category to be available for selection when you want to assign a competency category to a competency, you need to activate the competency category.

Associating a Category to a Competency

This task allows the user to associate one or multiple categories to a specific competency in order to classify competencies and then provide the ability to filter competencies by category when users are searching for a competency.

The user must have administration permissions and access to competency management.

Configuration > **[Competencies] Competency Categories**

1. In the **Competency Category Management** page, click the name of the competency category to which you want to add a or multiple competencies.
2. In the **Competency Category** page, click **Add** next to **Competencies**.
3. In the **Competency Selector** page, select the competencies you want to associate to the competency category.
4. Click **Select**.

The selected competencies will be associated to the competency category.

Associating a Competency to a Category

This task allows the user to associate one or multiple competencies to a competency category.

The user must have administration permissions and access to competency management.

The competency must be in a draft or inactive status to be edited, and to assign a competency group.

Configuration > **[Competencies] Competencies**

1. In the **Competency Management** page, click the name of the competency to which you want to assign a competency group.
2. In the **Competency** page, click **Edit** next to **Properties**.

   If the Edit link is not available, this means that the competency is active and cannot be edited; to make a change, you will first need to deactivate the competency.
3. In the **Competency Editor** page, click Search next to the **Competency Group** field.
4. Make your choice inn the **Competency Selector** page and click **Select**.
5. Click **Save** to register your change.
6. If the competency was previously active and you deactivated it, make sure to activate it again.

The selected competency group will be associated to the competency.

Deleting a Competency Category

Deleting a competency category removes the category from the list of competency categories.

The user must have administration permissions and access to competency management.

If the competency category is associated to a competency, whether active or inactive, deletion will not be permitted.

Configuration > **[Competencies] Competency Categories**

1. In the **Competency Category Management** page, locate the competency category to delete and click **Delete** under **Actions**.
2. Confirm the deletion.

If the competency category is not associated to any competency, the deletion will be done. However, if the competency category is associated to any competency in the system, a message informs you that the operation is not possible.

Competency Category Fields

The following table presents a list of all fields related to competency categories in Performance Administration. Each entry in the table includes the field name, a description, possible values (when they are predefined), the part of the application to which the field applies and the field's section header.

UI Element	Description	Applicable to	Header
Code	Unique code assigned to the competency category.	Competency Categories	Properties
Name	Name of the competency category.	Competency Categories	Properties
Description	Description of the competency category.	Competency Categories	Properties
Status	Status of the competency category, which can be Draft, Active or	Competency Categories	Properties

UI Element	Description	Applicable to	Header
	Inactive. Only active competency categories will be available as filters when searching for competencies.		

Working with Sub-Competencies

Sub-Competency

A sub-competency is a specific facet of a competency.

If an organization considers a particular competency to be composed of constituent elements, the latter are called sub-competencies in Performance.

For example, an organization might decide that written communication, verbal communication and non-verbal communication are sub-competencies of the behavioral competency “communication”.

Adding a Sub-Competency to a Competency

A sub-competency, a subset of a competency, improves the manager's understanding of a competency by providing more context. The following steps show how to create a sub-competency and add it to a competency.

A sub-competency can only be added if the competency has “Draft” status. If you have activated the concept, sub-competencies can no longer be added, edited or deleted.

Configuration > **[Competencies] Competencies**

1. In the Competency Management page, navigate to the competency you want to edit and then click its name. (Alternatively, use the Refine by list to locate the competency more quickly.)
2. Click Edit next Sub-competencies.
3. In the Competency Editor page, click Create.
4. Enter the name you want to assign to the sub-competency in the Sub-competency Name field and then click OK.
5. Create the other sub-competencies in a similar manner and then click the arrow keys to reorder sub-competencies if necessary.
6. Click Save.

The sub-competencies are displayed on the Competency Editor page in the Sub-competencies section.

You can edit the sub-competency or you can activate the competency if you are sure that all the information is correct and complete.

Editing a Sub-Competency

The following steps show how to edit a sub-competency.

Configuration > **[Competencies] Competencies**

1. In the Competency Management page, navigate to the competency you want to edit and then click its name. (Alternatively, use the Refine by list to locate the competency more quickly.)
2. If the status of the competency is “Draft” or “Inactive”, proceed immediately to the next step. If you have already activated the competency (its status is “Active”), click Deactivate next to the name of the competency or the language list.
3. Click Edit next to Sub-competencies.
4. In the Competency Editor page, you can perform four types of edits.
    - You can click Create, enter the name of a new sub-competency in the Sub-competency Name field, and then click OK.
    - You can click a sub-competency, click Edit and then enter a new name in the Sub-competency Name field, and then click OK.
    - You can click a sub-competency and then click Delete to delete it.
    - You can click a sub-competency and then click the arrow keys to change the sub-competency's position relative to the others.
5. Click Save.
6. If you deactivated the competency earlier and have no other changes to make, click Activate to make the competency available to employees for selection. If the current status is “Inactive” and you want to make other changes, for example, modify the competency contexts, make all the changes before clicking Activate.

On the Competency Editor page, your changes are displayed in the Sub-competencies section.

You can activate the competency if you want to make it available to your users.

Deleting a Sub-Competency

A sub-competency can only be deleted if the competency has “Draft” status. If you have activated the competency, sub-competencies can no longer be created, edited or deleted.

Configuration > **[Competencies] Competencies**

1. In the Competency Management page, navigate to the competency you want to edit and then click its name. (Alternatively, use the Refine by list to locate the competency more quickly.)
2. Click Edit next to Sub-competencies.
3. In the Competency Editor page, you can click a sub-competency and then click Delete to delete it.
4. Click Save.

On the Competency Editor page, the sub-competency is no longer displayed in the Sub-competencies section.

Sub-Competency Fields and Buttons

All fields related to sub-competencies 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 header.

Field	Description	Applicable to	Header
Cancel	If you don't want to save the changes you've made on the current page, click Cancel. The system typically displays the previous page.	Competency Editor page	
Create	To create an instance of an item, click Create.	Competency Editor page	
Delete	To remove an item, click Delete. This action cannot typically be undone afterward.	Competency Editor page	
Edit	If you want to edit information and the competency is in Draft status, you can click Edit.	Competency Editor page	
Language	Presents a pull-down menu from which you can select one of the activated languages to view the page information in that specific language.	Competency Editor page	
Move the selected item down	If a list of items has two green icons in the form of arrowheads next to it, you can click an item in the list and then click the lower arrowhead to move the item to a lower position in the list.	Competency Editor page	
Move the selected item up	If a list of items has two green icons in the form of arrowheads next to it, you can click an item in the list and then click the upper arrowhead to move the item to a higher position in the list.	Competency Editor page	
Refresh	If you change a value in a field that has a Refresh icon next to it and then click Refresh, information on the page is updated to reflect the change.	Rating Model Management page Rating Models page Rating Model Editor page Rating Dimension Editor page	
Save	To save your changes, click Save.	Competency Editor page	

Working with Competency Definition Contexts

Competency Definition Context

A competency definition context is used to display different competency definitions depending on the specified context.

Each competency has one default description. However, an organization can create multiple definitions for a competency, associating each one with specific parts of the organization, specific locations and/or specific job fields. When the competency is later displayed to an employee, the competency definition that is displayed varies according to the employee's organization, location and job field.

If you specify multiple elements from the same category (Organization, Location or Job Field), these elements are connected by the OR operator and are therefore inclusive. If you add elements from different categories, for example, an organization and a location, these elements are connected by the AND operator and are exclusive. For example, if you specified the Finance and Marketing sections of your organization and Portugal and Brazil locations, and then applied the competency definition context to a competency definition, only employees who worked for the Finance OR Marketing sections AND worked in Portugal OR Brazil would see the definition.

Competency Definition Contextualization

The contextualization of competency definitions to be included in performance reviews are based on the organization, location or job field of the employee being evaluated.

This functionality allows system administrators to apply specific competency definitions to specific organizations, locations and/or job fields so that the corresponding competencies be applied to the corresponding employees. For example, the description of a competency might be different based on department - the Leadership competency can be described differently in Sales than in Support.

First, the competency definition context needs to be created and defined via **Configuration** > **[Competencies] Competency Contexts** . Then the competency definition must be created and associated to the desired context via **Configuration** > **[Competencies] Competencies** **Configuration** > **[Competencies] Competencies** .

Competency Context

A competency context is used to limit who can view a specific competency, depending on the specified organization, location or job field, or any combination thereof.

A competency context provides the ability to define a specific context in which a competency is available so that only employees who work for those specified organizations, locations and/or job fields are able to view.

> **Note:** Although the creation and management of competency contexts is possible, there is no impact for now on the display of competencies in the Talent Profile. Competency contexts were created for future use.

Creating a Competency Definition Context

Creating a competency definition context makes the context available for selection when you are creating separate competency definitions for specific sectors of the organization, specific locations and/or specific job roles.

The product setting “Enable Competency Context Management” must be set to Yes.

Configuration > [Competencies] Competency Definition Contexts

1. In the Definition Context Management page, click Create.
2. In the New Definition Context page, select the language in which you want to create the competency definition context elements. (You will later have to create competency definition context elements for each of the other languages that appear in the language list.).
3. Enter the code and name you want to assign to the competency definition context and then click Finish.
4. In the Definition Context page, specify the organizations, locations and/or job fields corresponding to the definition context by clicking Add next to the appropriate section header.

The competency definition context you created and its corresponding organizations, locations and job fields are displayed in the Definition Contexts list on the Definition Context Management page. The competency definition context cannot be added to a competency definition, however, until you have activated the definition context.

You can activate the competency definition context if you are certain that all the information is complete and correct and you want to make the context available for selection in competencies.

Editing a Competency Definition Context

The following steps show how to edit a competency definition context.

Configuration > [Competencies] Competency Definition Contexts

1. In the Definition Context Management page, locate the competency definition context you want to edit in the Definition Contexts list and then click its name. (Alternatively, use the Refine by list to locate the competency definition context more quickly.)
2. If the status of the competency is “Draft” or “Inactive”, proceed immediately to the next step. If you have already activated the competency (its status is “Active”), click Deactivate next to the name of the competency or the language list.
3. Edit the competency definition context (following certain edits, the system might request you to save your changes).
4. If you deactivated the competency earlier and have no other changes to make, click Activate to make the competency available to employees for selection. If the current status is “Inactive” and you want to make other changes, for example, modify the competency contexts, make all the changes before clicking Activate.

If you display the Definition Context Management page, your changes are displayed.

You can activate the competency definition context if you want to make it available for selection in competencies.

Activating a Competency Definition Context

Activating a competency definition context allows you to apply it to competency definitions. (When a competency definition context is first created, it has “Draft” status and cannot be used until its status is changed to “Active”.)

After you activate a competency definition context it cannot be edited or deleted. It is essential, therefore, that you ensure all the information is complete and correct before you activate a competency definition context.

Configuration > **[Competencies] Competency Definition Contexts**

1. On the Definition Context Management page, locate the competency definition context you want to activate in the Definition Contexts list and then click the corresponding Activate in the Actions column. (Alternatively, use the Refine by list to locate the competency definition context more quickly.)

On the Definition Context Management page, Competency Definition Contexts list, Actions column, the status of the competency context is “Active”. If you later edit a competency (whose status is “Draft”), and create a context-specific definition, when you click Search next to the Competency Definition Context field, the definition context you activated is displayed in the list of available contexts and can be selected.

You can edit the competency's properties and description or add a context-specific definition to the competency.

Duplicating a Competency Definition Context

Duplicating a competency definition context allows you to quickly create a new competency definition context based on an existing one.

Ideally, you have an existing competency definition context that resembles in most respects the competency definition context you want to create.

Configuration > **[Competencies] Competency Definition Contexts**

1. In the Definition Context Management page, locate the competency definition context you want to duplicate in the Definition Contexts list and then click the corresponding Duplicate in the Actions column. (Alternatively, use the Refine by list to locate the competency definition context more quickly.)

   The status of the existing competency definition context can be “Active” or “Draft”.

2. You can edit the new competency definition context's properties (be sure to assign a unique name for the new competency definition context), organizations, locations and job fields. Click Save where indicated to save your changes.

If you return to the Definition Context Management page, the new competency definition context is displayed in the Definition Contexts list. If you are certain that all the information is complete and correct, you can activate the competency context definition.

Deleting a Competency Definition Context

A competency definition context can only be deleted if it has “Draft” status. If you have activated the competency definition context, it can no longer be edited or deleted.

Configuration > **[Competencies] Competency Definition Contexts**

1. In the Definition Context Management page, locate the competency definition context you want to delete in the Definition Contexts list and then click the corresponding **Delete** in the Actions column. (Alternatively, use the Refine by list to locate the competency definition context more quickly.)
2. Click Yes to confirm you want to delete the competency definition context.

The competency definition context is no longer displayed in the Definition Contexts list.

Competency Definition Context Fields

All fields related to competency definition contexts 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 header.

Field	Description	Applicable to	Header
Actions	Actions that you can currently perform. For example, if a competency has Draft status, the Actions column typically has an Activate icon you can click to activate the competency.	Definition Context Management page	
Activate	You click Activate when you want to change an item's status from Draft to Active. While a competency, rating model, etc. has Draft status, it can be edited but it is unavailable to users. After the status is changed from Draft to Active, a competency, rating model, etc. is available but the item can no longer be edited or deleted.	Definition Context page	
Add	Add an item.	Definition Context page	
By	The person or group who initiated the event.	Definition Context page	
Cancel	If you don't want to save the changes you've made on the current page, click Cancel. The system typically displays the previous page.		
Category	Broadest unit within a job field.	Job Field Selector page	
City	A city.	Location Selector page	
Company	The broadest unit in the organization	Organization Selector page	
Country	A territorial division that has independent status and contains a body of people of one or more nationalities.	Location Selector page	
Create	To create an instance of an item, click Create.	Definition Context Management page	
Date and Time	The date and time that an event occurred regarding a competency. For example, the date and time when a sub-competency was added.	Definition Context page	

Field	Description	Applicable to	Header
Delete	To remove an item, click Delete. This actions cannot typically be undone afterward.	Definition Context page	
Department	The broadest unit in the organization under Company.	Organization Selector page	
Details	Additional information regarding an event that occurred involving a competency.	Definition Context page	
Division	The broadest unit in the organization under Department.	Organization Selector page	
Duplicate	To create a new item, it is often quicker to duplicate an existing item and then edit the duplicate. To duplicate an item, click Duplicate and then make your changes.	Definition Context page	
Edit	If you want to edit information and the item (competency, rating model, etc.) is in Draft status, you can click Edit.	Definition Context page	
Event	An action that was performed regarding a competency. For example, if you add a sub-competency, the event is logged in the History section.	Definition Context page	
Finish	When you have completed all the steps related to a task and do not need to make any more changes, click Finish to complete the task.	New Definition Context page	
Function	Broadest unit in a job field under Category.	Job Field Selector page	
Hide	If you don't want to view the information in a particular section, you click the corresponding Hide.	Definition Context page	
History	This section displays a listing of all events that have occurred regarding an item. For example, the date and time when a competency definition was added to a competency. The History section also indicates the name of the event, a short description and the name of the person or group who initiated the event.	Definition Context page	
Job Fields	Only employees who belong to these job fields can view and add the competency to a talent profile.	Definition Context Management page	
Language	Presents a pull-down menu from which you can select one of the activated languages to view the	New Definition Context page Definition Context page	

Field	Description	Applicable to	Header
	page information in that specific language.		
Locations	Only employees who are part of these locations can view and add the competency to a talent profile.	Definition Context Management page	
More	To see additional information, click More.	Definition Context page	
Name	The name of the item (competency, rating model, competency context, etc.).	Definition Context Management page New Definition Context Definition Context page	
Organizations	Only employees who are part of these organizations can view and add the competency to a talent profile.	Definition Context Management page	
Refine by	You can limit the items displayed in a list to those that correspond to a criterion.	Definition Context Management page Organization Selector page Location Selector page Job Field Selector page	
Refresh	If you change a value in a field that has a Refresh icon next to it and then click Refresh, information on the page is updated to reflect the change.	Definition Context Management page New Definition Context page Definition Context page Organization Selector page Location Selector page Job Field Selector page	
Remove	Removes a specific entry from a list.	Definition Context page	
Remove All	Removes all entries from a list.	Definition Context page	
Save	To save your changes, click Save.	Definition Context page	
Select	After making selections in a list, you click Select to confirm your selections.	Organization Selector page Location Selector page Job Field Selector page	

Field	Description	Applicable to	Header
Specialty	Broadest unit in a job field under Function.	Job Field Selector page	
State/Province	One of the constituent units of a nation having a federal government.	Location Selector page	
Status	The status of the item (competency, rating model, competency context, etc.). If the competency has Draft status, it can be edited. If it has Active status, it has been activated for use in the system and it can no longer be edited.	Definition Context Management page New Definition Context page Definition Context page	
World Region	Largest geographic area, typically containing a continent.	Location Selector page	

Working with Rating Models

Rating Model

A rating model is used to define the scale upon which a given competency, goal or performance review item is assessed. The rating model provides the ability to define a numerical value and a text description for each value on a rating scale.

When assessing an employee's or candidate's performance of a competency or goal, an accurate picture results when you can rate the individual's performance of each dimension. A rating model is made of five different dimensions and their corresponding rating values. Of the five dimensions, four are active by default (Experience, Proficiency, Last Use and Interest) and one is editable (Performance Rating). A rating model can be applied to multiple competencies or goals.

Note: The four default dimensions cannot be used with performance reviews.

There are three default types of rating models:

- Taleo Behavioral Rating Model, assigned by default to behavioral competencies
- Taleo Language Rating Model, assigned by default to language skills
- Taleo Technical Rating Model, assigned by default to job specific competencies

The rating model's dimension values must be set and ordered in an ascending order, that is the lowest rating first, with the lowest numeric value, and the highest rating last, with the highest value. Rating models containing descending rating values are not supported in performance review overall rating calculations.

Any rating model and their respective rating values cannot be edited or deleted after they have been activated.

The display of each rating model dimension in the Talent Profile is determined by the Talent Profile Competency Configuration settings.

Creating a Rating Model

Creating a rating model provides the ability to associate this rating model to competencies or performance reviews.

Configuration > **[Competencies]**

1. On the Rating Model Management page, click Create.
2. In the language list, select the language in which you want to create the rating model elements. (You will later have to create rating model elements for each of the other languages that appear in the language list.)
3. Specify a code and name, as well as a description if so desired.
4. Click Save.
5. In the Rating Model page, it is possible to edit the properties of the current rating model, change the order of the dimensions and to manage the Performance Rating dimension.
6. To create the rating values for the Performance Rating dimensions:
    a. In the Rating Model page, click the name of the Performance Rating dimension.
    b. In the Rating Dimension page, click Edit next to Properties if you need to edit the properties of the dimension.
    c. To create the rating values for that dimension, click Create next to Rating Values.
    d. In the New Rating Value page, enter the name and numeric value you want to assign to the rating value (e.g. Novice; 1) and then click Save. The rating value name and value are displayed in the Rating Values section.
    e. Once all rating values are created, click Reorder next to Rating Values and make sure to order the rating values by ascending order, that is the lowest rating at the top, with the lowest numeric value, and the highest rating at the bottom, with the highest value. Note that although the system lets you create rating models with descending rating values, these are not supported in performance review overall rating calculations.
    f. Once all the rating values created and ordered as desired, you can activate the rating dimension by clicking Activate. This action activates only the dimension, not the rating model
7. Back on the Rating Model page, you can change the display order of the dimensions by clicking Reorder next to Dimensions.

The rating model appears in the list on the Rating Models Management page but it cannot be used until it has been activated.

You can activate the rating model if you want to make it available for selection in competencies.

Editing a Rating Model

The following steps show how to edit a rating model.

You can only edit a rating model whose status is still “Draft”.

Configuration > **[Competencies]**

1. In the Rating Model Management page, locate the rating model you want to edit in the Rating Models list and then click its name. (Alternatively, use the Refine by list to locate the rating model more quickly.)

    The status of the existing rating model must be “Draft”.

2. Edit the rating model (following certain edits, the system might request you to save your changes).

If you display the Rating Model Management page, your changes are displayed.

You can activate the rating model if you want to make it available for selection in competencies.

Duplicating a Rating Model

Duplicating a rating model allows you to quickly create a new rating model based on an existing one.

Ideally, you have an existing rating model that resembles in most respects the rating model you want to create.

Configuration > **[Competencies]**

1. In the Rating Model Management page, locate the rating model you want to duplicate in the Rating Models list and then click the corresponding Duplicate in the Actions column. (Alternatively, use the Refine by list to locate the rating model more quickly.)

   The status of the existing rating model can be Active or Draft.

2. You can edit the rating model's name and the Performance Rating dimension to assign the values you want the new model to have.

If you display the Rating Model Management page, the new rating model is displayed in the Rating Models list.

If you are sure that all the information is complete and correct, you can activate the rating model.

Activating a Rating Model

Activating a rating model allows you to add it to competencies. (When a rating model is first created, it has Draft status and cannot be added to competencies until its status is changed to Active.)

Once you activate a rating model it cannot be edited or deleted. It is essential, therefore, that you ensure all the information is complete and correct before you activate a rating model.

Configuration > **[Competencies]**

1. In the Rating Model Management page, locate the rating model you want to activate in the Rating Models list and then click the corresponding Activate in the Actions column. (Alternatively, use the Refine by list to locate the rating model more quickly.)

The rating model can be used as the default rating model for a competency or it can be used in a performance review.

Though not a requirement, you can add the rating model to a competency.

Adding a Rating Model to a Competency

Adding a rating model to a competency (the competency's status must be “Draft”) replaces the default rating model.

You have to create and activate a rating model before you can add it to a competency.

You can change the rating model associated with a competency provided the competency's status is Draft.

Configuration > [Competencies] Competencies

1. In the Competency Management page, locate the competency you want to edit and then click its name. (Alternatively, use the Refine by list to locate the competency more quickly.)
2. Click Edit in the Rating Model section.
3. Click Search next to the Rating Model field, click the radio button next to the rating model you want to assign to the competency and then click Select.
4. Click Save.

The rating model you selected is displayed on the Competency Editor page in the Rating Model section.

Though not a requirement, you can edit a sub-competency.

Deleting a Rating Model

If you want to delete a rating model and its status is “Draft”, follow the instructions in this section.

A rating model can only be deleted if it has Draft status. If you have activated the rating model, it can no longer be edited or deleted.

Configuration > [Competencies]

1. When the Rating Model Management page is displayed, locate the model you want to delete in the list and then click the corresponding Delete in the Actions column. (Alternatively, use the Refine by list to locate the rating model more quickly.)
2. Click Yes to confirm you want to delete the rating model.

The rating model no longer appears in the list on the Rating Models Management page.

Rating Model Fields and Buttons

All fields related to Rating Models are presented in the following table. Each entry in the table includes the field name, a description, possible values (when they are predefined), the part of the application to which the field applies and the field's header.

Field	Description	Applicable to	Header
Code	Code of the rating model, which is mandatory.	Rating Model	Properties
Code	Code of the rating model dimension, which is editable only for the Performance Rating dimension.	Rating Dimension	Properties
Date and Time	The date and time that an event occurred regarding a competency. For example, the date and time when a sub-competency was added.	Rating Model	History

Field	Description	Applicable to	Header
Description	Description of the rating model.	Rating Model	Properties
Description	Description of the rating model dimension, which is editable only for the Performance Rating dimension.	Rating Dimension	Properties
Details	Additional information regarding an event that occurred regarding a competency.	Rating Model	History
Dimension Type	There are five types of dimensions: Proficiency,Experience, Last Used, Interest and PerformanceRating. Only the Performance Rating dimension is editable; all other dimensions are created and activated by default.	Rating Dimension	Properties
Event	An action that was performed regarding a competency. For example, if you add a sub-competency, the event is logged in the History section.	Rating Model	History
Language	Presents a pull-down menu from which you can select one of the activated languages to view the page information in that specific language.	Rating Model	
More	To see additional information, click More.	Rating Model	History
Name	Name of the rating model, which is mandatory.	Rating Model	Properties
Name	Name of the rating model dimension, which is editable only for the Performance Rating dimension.	Rating Dimension	Properties
Name	Name of the rating value.	Rating Dimension	Rating Values
Numeric Value	Numeric value to be associated to the rating value. This value will be used to calculate the performance review's overall rating.	Rating Dimension	Rating Values
Status	Status of the rating model, which can be Draft, Active or Inactive. The Draft status only occurs at creation time. Once the rating model has been activated once, its status will either be Active or Inactive. It can never go back to a Draft status.	Rating Model	Properties
Status	Status of the rating model dimension, which is always Active for the Proficiency, Experience, Last Used and Interest dimensions. For the Performance Rating	Rating Dimension	Properties

Field	Description	Applicable to	Header
	dimension, the status can be Draft, Active or Inactive. The Draft status only occurs at creation time. Once the Performance Rating dimension has been activated once, its status will either be Active or Inactive. It can never go back to a Draft status.		

Working with Guidance Plans

Guidance Plan

Customers create and manage guidance plans using the Configuration module.

A guidance plan is additional text that assists managers in understanding a competency. It is composed of two types of content: BARS content and writing assistant content. Both sets of content are tied to the rating model associated with the competency.

- BARS (Behaviorally Anchored Rating Scales) content provides a manager with examples of behaviors for a given competency.
- Writing assistant content provides sample content that a manager can use when assessing a competency.

A guidance plan enables the organization to add additional descriptions to each value in a Performance rating model. Managers later see these descriptions when rating a competency that uses the rating model. A manager can use one of the predefined comments when writing comments for a competency that includes the rating model on a performance review. The comments in a guidance plan are only suggestions; a manager is free to select a comment and then edit it or to enter an original comment.

> **Note:** Third party integration of guidance plans through Service Activation Request with Support is not available as of Feature Pack 12B. There is no Taleo Connect Client support for importing guidance plans.

Creating a Guidance Plan - Properties

Creating a guidance plan provides BARS content and writing assistant content that assist the manager in understanding a competency in general and specifically its associated rating model. BARS content provides a manager with examples of behaviors for a given competency. Writing assistant content provides sample content that a manager can use when assessing a competency.

While creating a guidance plan, you have to provide the name of the competency with which the plan will be associated. For this reason, you typically edit and activate a competency before creating the corresponding guidance plan.

Configuration > **[Competencies] Guidance Plans**

1. In the Guidance Plan Management page, click Create.

2. Click the language list and click a language in which you want to create guidance plan elements. (You will later have to create guidance plan elements for each of the other languages that appear in the language list.)
3. Enter the name and description you want to assign to the guidance plan in the corresponding fields.
4. Click Search next to the Competency field, click the radio button next to the competency to which you want to add the guidance plan and then click Select.
5. Click Search next to the Rating Dimension field. Click the radio button that corresponds to the dimension and rating model (the one that will be used in the performance review or the one associated with the competency) and then click Select. Click Next.

The system displays the Behavioral Anchor Ratings and Writing Suggestions section.

Populating a Guidance Plan - BAR Ratings and Writing Suggestions

Populating a guidance plan with BAR ratings and writing suggestions allows you to provide a text description for each element in the behavioral anchor rating (BAR) set associated with a specific competency and dimension, and to provide examples of comments that a manager can select and edit when making a BAR selection.

Creating a guidance plan - properties

Configuration > **[Competencies] Guidance Plans**

1. In the Guidance Plans page, in the Behaviorally Anchored Rating Scales and Writing Suggestion section, you can replace the default BAR descriptions with ones better suited to the needs of your organization. Click Edit in the left column next to a BAR description you want to replace, enter a new description in the Description field and then click Save. Replace other BAR descriptions in a similar manner if desired.
2. In the same page and in the same section, you can replace the default writing suggestions with ones better suited to the needs of your organization. In the column at the right, click Edit next to a writing suggestion you want to replace, enter a new suggestion in the Description field and then click Save. Replace other writing suggestions in a similar manner if desired.
3. Click Next and then click Finish.

On the Guidance Plan Management page, the Guidance Plan list displays the new guidance plan. The plan's status is “Draft”; your changes will not be displayed in the competency's rating dimension until you have activated the guidance plan.

You can activate the guidance plan if you are sure that all the information is complete and correct.

Editing a Guidance Plan

The following steps show how to edit a guidance plan.

You can only edit a guidance plan whose status is still “Draft”.

Configuration > **[Competencies] Guidance Plans**

1. In the Guidance Plan Management page, locate the guidance plan you want to edit in the Guidance Plans list and then click its name. (Alternatively, use the Refine by list to locate the guidance plan more quickly.)
2. Edit the guidance plan (following certain edits, the system might request you to save your changes.

If you return to the Guidance Plan Management page, your changes are displayed.

You can activate the guidance plan if you want to make it available for selection.

Duplicating a Guidance Plan

Duplicating a guidance plan allows you to quickly create a new guidance plan based on an existing one.

Ideally, you have an existing guidance plan that resembles in most respects the guidance plan you want to create.

Configuration > **[Competencies] Guidance Plans**

1. In the Guidance Plan Management page, locate the guidance plan you want to duplicate in the Guidance Plans list and then click the corresponding Duplicate in the Actions column. (Alternatively, use the Refine by list to locate the guidance plan more quickly.)

   The status of the existing guidance plan can be Active or Draft.

2. You can edit the new guidance plan's properties (be sure to assign a unique name for the new guidance plan), behaviorally anchored rating scales and writing suggestion. Click Save where indicated to save your changes.

If you return to the Guidance Plan Management page, the new guidance plan is displayed in the Guidance Plans list.

If you are certain that all the information is complete and correct, you can activate the guidance plan.

Activating a Guidance Plan

Activating a guidance plan allows you to add it to competency rating dimensions. (When a guidance plan is first created, it has Draft status and cannot be added to competency rating dimensions until its status is changed to Active.)

After you activate a guidance plan it cannot be edited or deleted. It is essential, therefore, that you ensure all the information is complete and correct before you activate a guidance plan.

Configuration > **[Competencies] Guidance Plans**

1. In the Guidance Plan Management page, locate in the Guidance Plans list the guidance plan you want to display in a competency's rating dimension and then click the corresponding Activate in the Actions column. (Alternatively, use the Refine by list to locate the guidance plan more quickly.)

The guidance plan will be employed whenever the competency and dimension are included in a performance review.

Deleting a Guidance Plan

A guidance plan can only be deleted if it has “Draft” status. If you have activated the guidance plan, it can no longer be edited or deleted.

Configuration > [Competencies] Guidance Plans

1. In the Guidance Plan Management page, locate the guidance plan you want to delete in the list and click the corresponding Delete in the Actions column. (Alternatively, use the Refine by list to locate the guidance plan more quickly.)
2. Click Yes to confirm you want to delete the guidance plan.

The guidance plan no longer appears in the list on the Guidance Plan Management page.

Guidance Plan Fields

All fields related to Guidance Plans 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 header.

Field	Description	Applicable to	Header
BAR for (rating value)	Rating suggestion for each value of the selected rating model dimension.	Guidance Plan	Behaviorally Anchored Rating Scales and Writing Suggestions
By	Person or group who initiated the event.	Guidance Plan	History
Code	Code of the guidance plan, which is mandatory.	Guidance Plan	Properties
Competency	Competency for which the specified rating and comment suggestions are to be displayed.	Guidance Plan	Properties
Date and Time	Date and time that an event occurred regarding a competency. For example, the date and time when a sub-competency was added.	Guidance Plan	History
Description	Description of the guidance plan.	Guidance Plan	Properties
Details	Additional information regarding an event that occurred involving a competency.	Guidance Plan	History
Event	Action that was performed regarding a competency. For example, if you add a sub-competency, the event is logged in the History section.	Guidance Plan	History
Name	Name of the guidance plan, which is mandatory.	Guidance Plan	Properties
Rating Dimension	Specific rating model dimension for which the specified rating and comment suggestions are to be displayed.	Guidance Plan	Properties

Field	Description	Applicable to	Header
Status	Status of the guidance plan, which can be Draft, Active or Inactive. The Draft status only occurs at creation time. Once the guidance plan has been activated once, its status will either be Active or Inactive. It can never go back to a Draft status.	Guidance Plan	Properties
Suggestion for (rating value)	Comment suggestion for each value of the selected rating model dimension.	Guidance Plan	Behaviorally Anchored Rating Scales and Writing Suggestions

5 Job Role Administration

Working with Job Roles

Job Role

A job role is an entity in the system for classifying a certain job. It can be linked to a generic job type.

It is important to understand the relationship between the following concepts: job role, job position, job role context and job profile classification. A job role can be considered to be a “generic” job that includes job properties, requirements (certifications and competencies), a job description, qualifications and responsibilities. An example of a job role is executive secretary. A job position, on the other hand, is a specific instance of a job role. When a position is created based on a job role, the position includes the job role's description and requirements. A job role context offers the ability to provide different job descriptions for specific organizations, locations, job fields or job levels (SmartOrg elements). This means that a distinct job description will be displayed to users who belong to a specific organization, location, job field or job level. In other words, job role contexts provide the opportunity to contextualize a job role and consequently a position according to users' SmartOrg information. Similarly, job profile classification provides the ability to contextualize the certifications and competencies associated with a job position. When creating a job position, the HR administrator can click “Apply preselected profile requirement”, which will add the competencies (and respective values) and certifications to the job position.

A job role must be activated to be available for use with job position creation.

Viewing a Job Role

Job roles can be viewed at any time.

Configuration > **[SmartOrg] Administration** > **[Job Roles] Job Roles**

1. In the Job Role Management page, click the name of the job role you want to view.
2. If the information that you want to view is not displayed, click the corresponding Show.

Depending on a job role's status, you can edit, duplicate, activate, deactivate or delete the job role while it is in view mode.

Creating a Job Role

Creating a job role allows you to create an entity in the system for classifying a certain job.

Configuration > **[SmartOrg] Administration** > **[Job Roles] Job Roles**

1. In the Job Role Management page, click Create.

2. In the Job Role Wizard page, complete all mandatory fields, enter information in optional fields if desired and then click Next.
3. In the following page of the wizard, Job Description section, enter a description, qualifications and responsibilities in the corresponding fields if desired and then click Next.
4. If you are satisfied with the job role properties and job description as they appear in the summary, click Finish to save the job role.
5. The system displays the details of the new job role on a new page. To add a certification or competency, in the Requirements section, click the corresponding Add, complete the fields on the Certification Editor page or the Competency Editor page and then click Save. You can add multiple certifications and competencies.

The information you entered is displayed on the Job Role page. If you click the Job Role Management breadcrumb at the top of the page to return to the Job Role Management page, the job role is displayed in the list.

The job role must be activated before it is available for selection.

Editing a Job Role

Configuration > **[SmartOrg] Administration** > **[Job Roles] Job Roles**

1. In the Job Role Management page, click the name of the job role you want to edit.
2. Click the link (Edit, Add, Delete) that corresponds to the section you want to edit and the type of change you want to perform.

   If the information you want to edit is hidden from view, click the corresponding Show.
3. If the system displays an “Editor” page, make your changes on that page and then click Save.

On the Job Role page, your changes are displayed.

Duplicating a Job Role

Duplicating a job role allows you to quickly create a new role based on an existing one.

Ideally, you have an existing job role that resembles in most respects the job role you want to create.

Configuration > **[SmartOrg] Administration** > **[Job Roles] Job Roles**

1. In the Job Role Management page, locate the job role to be duplicated and click the corresponding Duplicate in the Actions column.
2. In the Job Role Wizard page, complete all mandatory fields, enter information in optional fields if desired and then click Next.
3. In the following page, enter a description, qualifications and responsibilities in the corresponding fields if desired and then click Next.
4. If you are satisfied with the summary, click Finish to save the job role.
5. A new page is displayed that includes the details of the new job role. In the Requirements section, you can perform any or all of the following steps.
   - To edit a certification or competency displayed, click the corresponding Edit, edit the fields and then click Save.
   - To add a certification or competency, click the corresponding Add, complete the fields and then click Save.
   - To delete a certification or competency, click the corresponding Delete in the Actions column.

6. If you want to add to the job role a definition that will only be available for selection by employees who are part of particular parts of the organization, work in specific locations or have specific job fields, or combinations thereof, click Add next to Definitions. Enter a description, qualifications and responsibilities if desired, click Search and select a job role context based on Foundation Data in SmartOrg, and then click Select and Save.

In the Job Role page, your changes are displayed. If you click the Job Role Management breadcrumb at the top of the page, the new job role is displayed in the Job Roles list on the Job Role Management page.

The job role is not available for selection until you change its status to Active.

Activating a Job Role

Activating a job role allows you to change its status from Draft or Inactive to Active and thereby make the job role available for selection.

To activate a job role, its current status must be Draft or Inactive. Also, the Name field must be translated into all active content languages.

Configuration > **[SmartOrg] Administration** > **[Job Roles] Job Roles**

1. In the Job Role Management page, locate the job role you want to activate and click the corresponding Activate in the Actions column.

The status of the selected job role is Active and the job role is available for selection.

Deactivating a Job Role

Deactivating a job role allows you to change a job role's status from Active to Inactive and thereby remove it from the list of job roles available for selection.

To be able to deactivate a job role, its current status must be Active.

Configuration > **[SmartOrg] Administration** > **[Job Roles] Job Roles**

1. In the Job Role Management page, locate the job role you want to deactivate and click the corresponding Deactivate in the Actions list.

In the Job Role Management page, Status column, the status of the job role is Inactive.

If you later want to make the job role available for selection, you must change its status to Active.

Deleting a Job Role

You can only delete a job role whose status is Draft.

Configuration > **[SmartOrg] Administration** > **[Job Roles] Job Roles**

1. In the Job Role Management page, locate the job role you want to delete and click the corresponding Delete in the Actions list.

The job role is no longer displayed in the Job Roles list on the Job Management page.

Job Role Fields

All fields related to the configuration of job roles are presented in the following table, along with a description and related possible values when predefined. Each entry also indicates the type of information the field applies to and the related header.

Field	Description	Applicable to	Header
Actions	Section that shows all the possible actions that can be performed with respect to the selected element.	Job Roles	Requirements
Asset	Value that indicates that an element is not a requirement for the job but it would be a good thing to have.	Job Roles	Requirements
Category	The most general section of a job field, Category indicates in which area the job is located.	Job Roles	Job Field
Certification	Indicates a particular training that the person has received.	Job Roles	Requirements
Competency	Indicates an ability that is either a requirement or an asset for the job.	Job Roles	Requirements
Description	Provides information about the job.	Job Roles	Job Description
Director	Indicates a person who supervises, controls, or manages.	Job Roles	Properties
Entry Level	Indicates a person who has no previous experience.	Job Roles	Properties
Executive	Indicates a person who has administrative or managerial authority in an organization.	Job Roles	Properties
Function	Refers to the type of work the job entails.	Job Roles	Job Field
Importance	Indicates whether the element is a requirement or an asset.	Job Roles	Requirements
Individual Contributor	Indicates a person who is able to work on his/her own.	Job Roles	Properties
Job Codes	Indicates the various external job codes associated with this job role. These job codes are imported via Taleo Connect.	Job Roles	Properties
Job Field	Indicates the area of work of the position.	Job Roles	Properties

Field	Description	Applicable to	Header
Job Level	Indicates the level of the position in the hierarchy.	Job Roles	Properties
Job Role Context	Provides further details about the context (location, organization, name, code, etc.) of a job role.	Job Roles	Definitions
Manager	Indicates a person who is responsible for planning and directing the work of a group of individuals, monitoring the group's work, and taking corrective action when necessary. Managers might manage workers directly or they might manage supervisors who in turn manage workers.	Job Roles	Properties
Manager With Direct Reports	Indicates a person who has managerial responsibilities and subordinates.	Job Roles	Properties
Manager Without Direct Reports	Indicates a person who has managerial responsibilities but does not have any subordinates.	Job Roles	Properties
Qualifications	Indicates the qualifications required for the job.	Job Roles	Job Description
Required	Value that indicates that an element is mandatory.	Job Roles	Requirements
Responsibilities	Indicates the responsibilities that come with the job.	Job Roles	Job Description
Senior Executive	Indicates a person who is a chief executive officer, chief operating officer, chief financial officer or someone in charge of a principal business unit or function.	Job Roles	Properties
Specialty	Refers to a specific type of job.	Job Roles	Job Field
Status	Status of the selected element. Possible values are: • Draft - When in Draft status, an element can be edited but it cannot be applied or associated with another element. To use an element, you have to change its status from Draft to Active. If the status of an element is changed from Draft to another status, the element can never have Draft status again. Only elements whose status is Draft can be deleted. • Inactive - While an element has Inactive status, it can be edited but it cannot be applied or associated with	Job Roles	Properties

Field	Description	Applicable to	Header
	another element. To use an element whose status is Inactive, you have to activate it. • Active - An element whose status is Active can be edited, applied or associated with another element.		
Target rating value	Indicates the ideal value a candidate would attain for a competency.	Job Roles	Requirements
Team Leader	Indicates a person who is in charge of a group.	Job Roles	Properties
Weight	The weight represents a percentage that establishes the relative importance of a competency or certification among the competencies and the certifications. Weight is used to calculate the best-fit match when searching for successors.	Job Roles	Requirements

Working with Job Role Contexts

Job Role Context

A job role context allows you to define a job role description that is only available to employees who are part of particular parts of your organization or in specific locations, job fields or job levels, or who satisfy any combination of these Foundation Data elements (from SmartOrg).

In addition to having a default job role description, your organization might want to define different descriptions for parts of the organization or for employees who work in specific locations, job fields or job levels.

If you specify multiple selections within one category, such as Organizations, those selections are inclusive. If you specify selections from more than one category (for example, an Organization selection and a Location selection), the combination of element categories is exclusive.

A job role context must be activated to be available for use with job profile creation.

Viewing a Job Role Context

Job role contexts can be viewed at any time.

Configuration > **[SmartOrg] Administration** > **[Job Roles] Job Role Contexts**

1. In the Job Role Context Management page, click the name of the job role context you want to view.

2. If the information you want to view is not displayed, click the corresponding Show.

Depending on a job role context's status, you can edit, duplicate, activate, deactivate or delete the job role context while it is in view mode.

Creating a Job Role Context

Creating a job role context allows you to later add it to a job role to “contextualize” the latter based on the OLF structure (Foundation Data from SmartOrg).

In **Configuration** > **[SmartOrg] Settings** , the Enable Job Role Context Management value must be set to Yes.

Configuration > **[SmartOrg] Administration** > **[Job Roles] Job Role Contexts**

1. In the Job Role Context Management page, click Create.
2. In the New Job Role Context page, complete all mandatory fields, enter information in optional fields if desired and then click Finish.
3. To add particular parts of your organization to the job role context, in the Job Role Context page click Add next to Organizations, click the check box next to each part of the organization (on the Organization Selector page) you want to add and then click Select.
4. You can add locations and/or job roles to the job role context in a similar manner.

On the Job Role Context page, the information you entered is displayed in the Properties, Organizations, Locations and Job Fields sections. If you added multiple selections within one category in step 3 and/or step 4, those selections are inclusive (use the OR operator). If you added selections from more than one category (for example, an Organization selection and a Location selection), those selections are exclusive (use the AND operator). If you click the Job Role Context Management breadcrumb at the top of the page, the job role context you created is displayed in the Job Profile Contexts list.

The job role context must be activated before it is available for selection in a job role.

Editing a Job Role Context

Configuration > **[SmartOrg] Administration** > **[Job Roles] Job Role Contexts**

1. In the Job Role Context Management page, click the name of the job context you want to edit.
2. Click the link (Edit, Add, Remove, Remove All) that corresponds to the section you want to edit and the type of change you want to perform.

   If the information you want to edit is hidden from view, click the corresponding Show
3. If the system displays an “Editor” page, make you changes in that page and then click Save.

On the Job Role Context page, your changes are displayed.

Duplicating a Job Role Context

Duplicating a job role context allows you to quickly create a new job role context based on an existing one.

Ideally, you have an existing job role context that resembles in most respects the job role context you want to create.

Configuration > **[SmartOrg] Administration** > **[Job Roles] Job Role Contexts**

1. In the Job Role Context Management page, locate the job role context you want to duplicate and click Duplicate.
2. In the New Job Role Context page, complete all mandatory fields, enter information in optional fields if desired and then click Finish.
3. In the Job Role Context page, edit the language, Properties, Organizations, Locations and Job Fields sections of the new job role context.

If you click the Job Role Context Management breadcrumb at the top of the page, the new job role context and its information are displayed in the Job Role Contexts list.

The job role context must be activated before you can add it to a job role.

Activating a Job Role Context

Activating a job role context allows you to change the status of the context from Draft or Inactive to Active and thereby have the context displayed in the list of available contexts.

To activate a job role context, its current status must be Draft or Inactive.

Configuration > **[SmartOrg] Administration** > **[Job Roles] Job Role Contexts**

1. In the Job Role Context Management page, locate the job role you want to activate and click the corresponding Activate in the Actions column.

The status of the selected job role context is now Active.

Deactivating a Job Role Context

Deactivating a job role context allows you to change its status from Active to Inactive. This action in turn allows you to remove the context from the list of contexts available for selection.

You can only deactivate a job role context whose current status is Active.

Configuration > **[SmartOrg] Administration** > **[Job Roles] Job Role Contexts**

1. In the Job Role Context Management page, locate the job role context in the list and click the corresponding Deactivate in the Actions column.
2. Click Deactivate.

The status of the selected job role context is now Inactive in the Actions column.

To “reactivate” a job role context, its status must be set to Active.

Deleting a Job Role Context

A job role context can only be deleted if its status is Draft.

Configuration > [SmartOrg] Administration > [Job Roles] Job Role Contexts

1. In the Job Role Context Management page, locate the job role context you want to delete and click the corresponding Delete in the Actions column.

The job role context is deleted from the Job Role Contexts list on the Job Role Context Management page.

Job Role Context Fields and Buttons

All fields related to the configuration of Job Role Contexts are presented in the following table, along with a description and related possible values when predefined. Each entry also indicates the type of information the field applies to and the related header.

Field	Description	Applicable to	Header
Actions	Section that shows all the possible actions that can be performed with respect to the selected element.	Job Role Context	Job Role Contexts
Job Fields	Indicates the job fields associated with a job role context. The values for this field come from selections made in the Job Field selector.	Job Role Context	Job Role Contexts
Locations	Indicates the locations associated with a job role context. The values for this field come from selections made in the Location selector.	Job Role Context	Job Role Contexts
Organizations	Indicates the organizations associated with a job role context. The values for this field come from selections made in the Organization Selector.	Job Role Context	Job Role Contexts
Status	Status of the selected element. Possible values are: • Draft - When in Draft status, an element can be edited but it cannot be applied or associated with another element. To use an element whose status is Draft, you have to change its status from Draft to Active. If the status of an element is changed from Draft to another status, the element can never have Draft status again. Only elements whose status is Draft can be deleted. • Inactive - While an element has Inactive status, it can be edited but it cannot be applied or associated with another element. To use an element whose status is	Job Role Context	Properties

Field	Description	Applicable to	Header
	Inactive, you have to activate it. • Active - An element whose status is Active can be edited, applied or associated with another element.		

Working with Job Profile Classifications

Job Profile Classification

A job profile classification allows you to define a specific, reusable job classification context for a job role.

A job profile classification allows you to define different certification and competency descriptions for specific parts of the organization, locations, job fields, job levels or combinations thereof. A contextual job classification overwrites the default certifications and competencies for the defined context.

When you are creating a job profile classification, you can add or change certifications and competencies but you cannot remove them. For example, if one of the competencies for a product manager is leadership, while you are defining a job profile classification you can modify the required rating based on the context or add a new competency to the position but you cannot remove the leadership competency from the context.

You must activate a job profile classification if you want to make it available for use with job profile creation.

Viewing a Job Profile Classification

Job profile classifications can be viewed at any time.

Configuration > **[SmartOrg] Administration** > **[Job Roles] Job Roles**

1. In the Job Profile Classification Management page, click the name of the job profile classification you want to view.
2. If the information you want to view is not displayed, click the corresponding Show.

Depending on a job profile classification's status, you can edit, duplicate, activate, deactivate or delete the job profile classification while it is in view mode.

Creating a Job Profile Classification

Creating a job profile classification allows you to create a specific, reusable job classification context for a job role.

Configuration > **[SmartOrg] Administration** > **[Job Roles] Job Profile Classifications**

1. In the Job Profile Classification Management page, click Create next to Job Profile Classifications.

2. In the New Job Profile Classification page, complete all mandatory fields, enter information in the optional fields if desired and then click Finish.
3. In the Job Profile Classification page, you can add certifications to the job profile classification by clicking Add next to Certifications in the Requirements section. After specifying the certification, importance and weight, click Save.
4. In the Job Profile Classification page, you can add competencies to the job profile classification by clicking Add next to Competencies in the Requirements section. After specifying the certification, importance and weight, click Save.
5. To add particular parts of your organization to the job profile classification, in the Job Profile Classification page, click Add next to Organizations, click the check box next to each part of the organization (on the Organization Selector page) you want to add and then click Select.
6. You can add locations, job fields and/or job levels to the job profile classification in a similar manner.

On the Job Profile Classification page, the information you entered is displayed in the Requirements, Organizations, Locations, Job Fields and Job Levels sections. If you added multiple selections within one category in steps 5 and/or 6, those selections are inclusive (use the OR operator). If you added selections from more than one category (for example, an Organization selection and a Location selection), those selections are exclusive (use the AND operator). If you click the Job Profile Classification Management breadcrumb at the top of the page, the job profile classification is displayed in the Job Profile Classifications list.

The job profile classification must be activated before it is available for selection.

Editing a Job Profile Classification

Configuration > **[SmartOrg] Administration** > **[Job Roles] Job Profile Classifications**

1. In the Job Profile Classification Management page, click the name of the job profile classification you want to edit.
2. Click the link (Edit, Add, Delete, Remove, Remove All) that corresponds to the section you want to edit and the type of change you want to perform.

   If the information you want to edit is hidden from view, click the corresponding Show.
3. If the system displays an “Editor” page, make your changes and then click Save.

On the Job Profile Classification page, your changes are displayed.

Adding an Organization to a Job Profile Classification

You can add an organization to a job profile classification to “contextualize” the classification.

Configuration > **[SmartOrg] Administration** > **[Job Roles] Job Profile Classifications**

1. In the Job Profile Classification Management page, click the name of the classification to which you want to add an organization.
2. In the Job Profile Classification page, click Add next to Organizations.
3. In the Organization Selector page, click the check box next to the organization(s) you want to add and then click Select.

In the Job Profile Classification page, the selected organizations are now displayed in the Organizations section.

Adding a Location to a Job Profile Classification

You can add a location to a job profile classification to “contextualize” the classification.

Configuration > **[SmartOrg] Administration** > **[Job Roles] Job Profile Classifications**

1. In the Job Profile Classification Management page, click the name of the job profile classification to which you want to add a location.
2. In the Job Profile Classification page, click Add next to Locations.
3. In the Location Selector page, click the check box next to the location(s) you want to add.
4. Click Select.

On the Job Profile Classification page, the selected locations are now displayed in the Locations section.

Adding a Job Field to a Job Profile Classification

Adding a job field to a job profile classification allows you to contextualize the latter.

Configuration > **[SmartOrg] Administration** > **[Job Roles] Job Profile Classifications**

1. In the Job Profile Classification Management page, click the name of the classification to which you want to add a job field.
2. In the Job Profile Classification page, click Add next to Job Fields.
3. In the Job Field Selector page, select the check box next to the job field(s) you want to add.
4. Click Select.

The selected job fields are now displayed in the Job Fields section of the Job Profile Classification page.

Adding a Job Level to a Job Profile Classification

Adding a job level to a job profile classification allows to use that job level as an applicable context for the classification. For example, an organization may have sales organizations in both the United States and Canada. The Sales Manager Job profile is the same, with the exception that the Managers in Canada have the competencies of being fluent in French. In such a situation, the organization might want to create a Job Profile Classification called “Canada” that is relevant in that location for Manager-level employees.

Configuration > **[SmartOrg] Administration** > **[Job Roles] Job Profile Classifications**

1. In the Job Profile Classification Management page, click the name of the job profile classification to which you want to add a job level.
2. In the Job Profile Classification page, click Add next to Job Levels.
3. In the Job Level Selector page, click the check box next to each job level you want to add.
4. Click Select.

On the Job Profile Classification page, the selected job levels are now displayed in the Job Levels section.

Duplicating a Job Profile Classification

Duplicating a job profile classification allows you to quickly create a new job profile classification based on an existing one.

Ideally, you have an existing job profile classification that resembles in most respects the job profile classification you want to create.

Configuration > **[SmartOrg] Administration** > **[Job Roles] Job Profile Classifications**

1. In the Job Profile Classification Management page, locate the classification you want to duplicate and click the corresponding Duplicate in the Actions column.
2. In the New Job Profile Classification page, complete all mandatory fields, enter information in optional fields if desired and then click Finish.
3. A new page is displayed that includes the details of the new job profile classification. In the Requirements section, you can perform any or all of the following steps.
    - To edit a certification or competency displayed, click the corresponding Edit, edit the fields and then click Save.
    - To add a certification or competency, click the corresponding Add, complete the fields and then click Save.
    - To delete a certification or competency, click the corresponding Delete in the Actions column.
4. To add particular parts of your organization to the job profile classification, in the Job Profile Classification page click Add next to Organizations, click the check box next to each part of the organization (on the Organization Selector page) you want to add and then click Select.
5. You can add locations and/or job roles to the job role context in a similar manner.

On the Job Profile Classification page, the information relative to the new classification is displayed. If you added multiple selections within one category in step 4 and/or step 5, those selections are inclusive (use the OR operator). If you added selections from more than one category (for example, an Organization selection and a Location selection), those selections are exclusive (use the AND operator). If you click the Job Profile Classification breadcrumb at the top of the page, the new job profile classification is displayed in the Job Profile Classifications list.

The job profile classification is not available for selection until you change its status to Active.

Activating a Job Profile Classification

Activating a job profile classification allows you to change its status from Draft or Inactive to Active. A job profile classification is only available for selection if its status is Active.

To activate a job profile classification, its current status must be Draft or Inactive.

Configuration > **[SmartOrg] Administration** > **[Job Roles] Job Profile Classifications**

1. In the Job Profile Classification Management page, locate the job profile classification you want to activate and click the corresponding Activate in the Actions column.

The status of the selected job profile classification is now Active and the classification is available for selection.

Deactivating a Job Profile Classification

Deactivating a job profile classification allows you to change its status from Active to Inactive and thereby remove it from the list of job profile classifications available for selection.

To deactivate a job profile classification, its current status must be Active.

Configuration > **[SmartOrg] Administration** > **[Job Roles] Job Roles**

1. In the Job Profile Classification Management page, locate the job profile classification that you want to deactivate and click the corresponding Deactivate.

In the Job Profile Classification Management page, Status column, the status of the job profile classification is Inactive.

If you later want to make the job profile classification available for selection, you must change its status to Active.

Deleting a Job Profile Classification

A job profile classification can only be deleted if its status is Draft.

Configuration > **[SmartOrg] Administration** > **[Job Roles] Job Profile Classifications**

1. In the Job Profile Classification Management page, locate the classification you want to delete and click the corresponding Delete in the Actions column.

The job profile classification is deleted and is no longer displayed in the Job Profile Classification list on the Job Profile Classification Management page.

Job Profile Classification Fields

All fields related to the configuration of job profile classifications are presented in the following table, along with a description and related possible values when predefined. Each entry also indicates the type of information the field applies to and the related header.

Field	Description	Applicable to	Header
Actions	Section that shows all the possible actions that can be performed with respect to the selected element.	Job Profile Classifications	Requirements
Certification	Indicates a particular training that the person has received.	Job Profile Classifications	Requirements
Competency	Indicates an ability that is either required or an asset for the job.	Job Profile Classifications	Requirements
Importance	Indicates whether the element is a requirement or an asset.	Job Profile Classifications	Requirements

Field	Description	Applicable to	Header
Job Fields	Indicates the job fields associated with a job role context. The values for this field come from selections made in the Job Field Selector.	Job Profile Classifications	Job Fields
Job Levels	Indicates the job levels associated with a job role context. The values for this field come from selections made in the Job Level Selector.	Job Profile Classifications	Job Levels
Locations	Indicates the locations associated with a job role context. The values for this field come from selections made in the Location Selector.	Job Profile Classifications	Locations
Organizations	Indicates the organizations associated with a job role context. The values for this field come from selections made in the Organization Selector.	Job Profile Classifications	Organizations
Status	Status of the selected element. Possible values are: • Draft - When in Draft status, an element can be edited but it cannot be applied or associated with another element. To use an element whose status is Draft, you have to change its status from Draft to Active. If the status of an element is changed from Draft to another status, the element can never have Draft status again. Only elements whose status is Draft can be deleted. • Inactive - While an element has Inactive status, it can be edited but it cannot be applied or associated with another element. To use an element whose status is Inactive, you have to activate it. • Active - An element whose status is Active can be edited, applied or associated with another element.	Job Profile Classifications	Properties
Target rating value	Indicates the ideal value a candidate would attain for a competency.	Job Profile Classifications	Requirements
Weight	Percentage that indicates the importance attributed to a section in the calculation of the overall score.	Job Profile Classifications	Requirements

Working with Job Positions

Job Position

A job position is a specific instance of a job role.

It is important to understand the relationship between the following concepts: job role, job position, job role context and job profile classification. A job role can be considered to be a “generic” job that includes job properties, requirements (certifications and competencies), a job description, qualifications and responsibilities. An example of a job role is executive secretary. A job position, on the other hand, is a specific instance of a job role. When a position is created based on a job role, the position includes the job role's description and requirements. A job role context offers the ability to provide different job descriptions for specific organizations, locations, job fields or job levels (SmartOrg elements). This means that a distinct job description will be displayed to users who belong to a specific organization, location, job field or job level. In other words, job role contexts provide the opportunity to contextualize a job role and consequently a position according to users' SmartOrg information. Similarly, job profile classification provides the ability to contextualize the certifications and competencies associated with a job position. When creating a job position, an HR administrator can click “Apply preselected profile requirement” to add the competencies (and respective values) and certifications to the job position.

The competencies and certifications can be copied from the job role with a single click, and then modified to suit the requirements of the job position. In this case, the competencies and certifications replace those defined by the job role.

The job description information—description, qualifications, responsibilities—from the job role cannot be modified for the job position.

A job position must be activated to be available for use with performance management.

Viewing a Job Position

Job positions can be viewed at any time.

Configuration > **[SmartOrg] Administration** > **[Job Positions] Job Positions**

1. In the Job Position Management page, click the name of the job position you want to view.
2. If the information you want to view is not displayed, click the corresponding Show.

Depending on a job position's status, you can edit, duplicate, activate, deactivate or delete the job position while it is in view mode.

Creating a Job Position

Creating a job position allows you to create an occurrence of a job role. Job positions are hierarchical and only the ones highest in the hierarchy are managed in the system.

Because a job position is attached to a job role, the latter must be created prior to the creation of a job position.

Configuration > **[SmartOrg] Administration** > **[Job Positions] Job Positions**

1. In the Job Position Management page, click Create.
2. In the New Job Position page, complete all mandatory fields and enter information in optional fields if desired.
3. Click Finish.
4. A new page is displayed that includes the details of the new job position. In the Requirements section, you can perform any or all of the following steps.
    - To edit a certification or competency displayed, click the corresponding Edit, edit the fields and then click Save.
    - To add a certification or competency, click the corresponding Add, complete the fields and then click Save.
    - To delete a certification or competency, click the corresponding Delete in the Actions column.
    - To remove all certifications or all competencies, click the corresponding Delete All.
    - To add certifications and competencies regarding the job role and job classification based on Foundation Data (from the OLF structure), click Apply Preselected Profile Requirements.

If you click the Job Position Management breadcrumb at the top of the page, the job position you created is displayed in the Job Positions list.

The job position must be activated before it is available for selection.

Editing a Job Position

Configuration > **[SmartOrg] Administration** > **[Job Positions] Job Positions**

1. In the Job Position Management page, click the name of the job position you want to edit.
2. Click the link (Edit, Add, Delete, Delete All) that corresponds to the section you want to edit and the type of change you want to perform.

   If the information you want to edit is hidden from view, click the corresponding Show.
3. If the system displays an “Editor” page, make your changes in this page and then click Save.

On the job position page, you changes are displayed.

Duplicating a Job Position

Duplicating of a job position allows you to quickly create a new job position from an existing one.

Ideally, you have an existing job position that resembles in most respects the job position you want to create.

Configuration > **[SmartOrg] Administration** > **[Job Positions] Job Positions**

1. In the Job Position Management page, locate the job position you want to duplicate and click the corresponding Duplicate in the Actions column.
2. In the New Job Position page, complete all mandatory fields, enter information in optional fields if desired and then click Finish.

The page corresponding to the new job position you created is displayed.

The job position is not available for selection until you change its status to Active.

Activating a Job Position

Activating a job position allows you to change a job position's status from Draft or Inactive to Active so the job position can later be attached to a job role.

To activate a job position, its status must be Draft or Inactive.

Configuration > **[SmartOrg] Administration** > **[Job Positions] Job Positions**

1. In the Job Position Management page, click the name of the job position you want to activate.
2. Click Activate.

The selected job position is now active (and consequently available for selection).

Deactivating a Job Position

Deactivating a job position allows you to change its status from Active to Inactive and thereby remove it from the list of job positions available for selection.

To deactivate a job position, its status must be Active.

Configuration > **[SmartOrg] Administration** > **[Job Positions] Job Positions**

1. In the Job Position Management page, click the name of the job position you want to deactivate and click Deactivate.

In the Job Position Management page, Status column, the status of the job position is Inactive.

If you later want to make the job position available for selection, you must change its status to Active.

Deleting a Job Position

A job position can only be deleted if its status is Draft.

Configuration > **[SmartOrg] Administration** > **[Job Positions] Job Positions**

1. In the Job Position Management page, locate the job position you want to delete and then click the corresponding Delete in the Actions column.

The job position is deleted and is no longer displayed in the list of job positions.

Job Position Fields

Fields related to the configuration of job positions 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
Actions	Section that displays all the possible actions that can be performed with respect to the selected element.	Job Position	Requirements
Asset	Value indicates that an item is not a requirement but it would be a good thing to have.	Job Position	Requirements
Certification	Indicates a particular training that the person has received.	Job Position	Requirements
Competency	Indicates an ability that is either a requirement or an asset for the job.	Job Position	Requirements
Criticality	Indicates the level of importance.	Job Position	Properties
Department	Indicates the department in which the position is found. Value for this field comes from a selection you made using the Department selector.	Job Position	Properties
Description	Field where you can enter a description of the position.	Job Position	Properties
Employee	Indicates the name of the employee currently in the position. Value for this field comes from a selection you made using the Employee selector.	Job Position	Properties
Importance	Indicates whether the element is a requirement or an asset.	Job Position	Requirements
Job Role	Indicates the job role to which this position is related. Value for this field comes from a selection you made using the Job Role selector.	Job Position	Properties
Location	Indicates the location of the position. Value for this field comes from a selection you made using the Location selector.	Job Position	Properties
Manager	Indicates the name of the manager for the position. Value for this field comes from a selection you made using the Manager selector.	Job Position	Properties

Field	Description	Applicable to	Header
Number of Openings	This field is not used for Performance. It is used by Recruiting.	Job Position	Properties
Opening Status	Indicates whether the position is open and needs to be filled.	Job Position	Properties
Organization	Indicates the organization under which the position is found. Value for this field comes from a selection you made using the Organization selector.	Job Position	Properties
Parent	Positions are structured in a hierarchy. This field indicates the "parent" position of the current one. Value for this field comes from a selection you made using the Parent selector.	Job Position	Properties
Required	Value indicates that an element is mandatory.	Job Position	Requirements
Status	Status of the selected element. Possible values are: • Draft - When in Draft status, an element can be edited but it cannot be applied or associated with another element. To use an element whose status is Draft, you have to change its status from Draft to Active. If the status of an element is changed from Draft to another status, the element can never have Draft status again. Only elements whose status is Draft can be deleted. • Inactive - While an element has Inactive status, it can be edited but it cannot be applied or associated with another element. To use an element whose status is Inactive, you have to activate it. • Active - An element whose status is Active can be edited, applied or associated with another element.	Job Position	Properties
Target Rating Value	Indicates the ideal value a candidate would attain for a competency.	Job Position	Requirements
Target Start Date	Indicates the ideal date when the candidate would start working in the position.	Job Position	Properties

Field	Description	Applicable to	Header
Weight	Percentage that indicates the importance attributed to a section in the calculation of the overall score.	Job Position	Requirements

6 Message Document and Template Administration

Working with Message Documents

Document

Documents provide structure and paragraphs provide content for message templates, which are used to send emails to users of Performance.

Content can relate to things such as, feedback requests, reviews, goal plans, or succession plans. Multiple paragraphs can be added to a text document, while a filed-based document consists of a PDF source file. Only a single document can be added to a message template.

Creating Paragraphs

Paragraphs provide content for text documents and can contain Performance variables, formatted text, hyperlinks, and images.

Public paragraphs can be added to multiple documents, while private paragraphs are created within a specific document and can only be used with it. Unless you are only using private paragraphs, you should create and activate public paragraphs before creating documents.

Adding a Paragraph

Configuration > **[Performance] Administration** > **[Global Configurations] Documents**

1. Click **Paragraph List** and click **Create**.
2. Enter a **Code** and mandatory **Name**.
3. Copy and paste required variables into the text editor.

   Ensure you copy and paste the variables exactly as they are in the **Available Variables** list or they will not work as expected. If intending to use in a Summary Email, be sure to select the variable(s) that are specific to Summary Emails, i.e., {Summary-Email.PendingDevelopmentPlanApprovalTaskLink}.
4. Use the text editor to enter paragraph content.
5. Click **Save**.

The paragraph is added to the system and you can click **Activate** to make it available to be used in documents.

You can select it from the **Paragraph List** to edit the content or deactivate it.

Creating a Paragraph

A text document must exist.

Configuration > **[Performance] Administration** > **[Global Configurations] Documents**

1. Select a document and click **Create** in the **Paragraphs** section.
2. Enter a **Code** and mandatory **Name**.
3. Copy and paste required variables into the text editor.

   Ensure you copy and paste the variables exactly as they are in the **Available Variables** list. If intending to use in a Summary Email, be sure to select the variable(s) that are specific to Summary Emails, i.e., {Summary-Email.PendingDevelopmentPlanApprovalTaskLink}.
4. Use the text editor to enter the required paragraph content.
5. Click **Save**.

The new paragraph is automatically activated and added to the document and listed in the **Paragraphs** section.

You can reorder the paragraphs as needed.

Creating Documents

Two types of documents can be created: text documents and file-based documents.

Text documents are created from paragraphs and are listed as **HTML** format in the **Document list**. They serve as a container for paragraphs, which can be added, created, deleted and reordered within the document.

> **Note:** To see whether a document's paragraphs are private or public, view the paragraph's history. If the history includes a *Paragraph Created* event, without a subsequent *Paragraph Activated* event, it is private.

File-based documents are created by adding a PDF file, which becomes the static content of the document. It is listed as **PDF** format in the **Document list**.

Creating a Text Document

Configuration > **[Performance] Administration** > **[Global Configurations] Documents**

1. Click **Create a text document**.
2. Enter the **Code** and mandatory **Name** and click **Save**.
3. Select the name of the document and click **Add** to add an existing active public paragraph or click **Create** to make a private paragraph.

   See *To Create a Private Paragraph* for details.
4. Click **Reorder** to change the sequence of the paragraphs if required.

   You can click **Edit** beside a paragraph to open the Paragraph Editor and modify it, but any changes made to public paragraphs will impact any other documents using them.
5. Click **Activate**.

The document is available in the **Document Selector** to be added to a message template.

You can click **Remove** to delete a paragraph from the document. If you remove a public paragraph it is still available; however, if you remove a private paragraph it is deleted from the system.

Creating a File-Based Document

Configuration > **[Performance] Administration** > **[Global Configurations] Documents**

1. Click **Create a file-based document**.
2. Enter the **Code**, mandatory **Name**, and **Description**.
3. Click **Browse** and select the PDF to be used as the content for the document.

4. Click **Save**.

It is added to the **Document list**, in **Draft** status.

Select the document and change the status to **Active** to enable it to be added to a message template.

Activating Documents and Paragraphs

Documents and paragraphs must be activated so they are available in the Document Selector and Paragraph Selector list and can be used.

The status of a paragraph needs to be active before it can be selected and added to a document, while a document needs to be active before it can be selected and added to a message template. When you deactivate an item that is part of a message template, it is still included in that message template. You can also change the status for an item's languages; however, the base language must remain active for active items.

To change the status, select the item and then click **Activate** or **Deactivate** as required.

When changing the status for the language of an item, select the language, click **Refresh** and then click **Activate** or **Deactivate**.

> **Note:** While you can activate and deactivate items, once activated an item cannot be returned to *Draft* status and subsequently deleted. Only *Draft* items can be deleted.

Document Fields

All fields related to Documents are presented in the table below, along with a description and possible values, when predefined. Each field also indicates the type of information it applies to and the related header.

Field	Description	Applicable to	Header
Available Variables	This field contains variables that you can add to your paragraph.	New Paragraph	Properties
Code	Alpha-numerical code used to identify an element (document, paragraph, etc.) The code is usually shown along with the name in a listing.	Document	Properties
Create a file-based document	This button opens the new document page. The properties section is the same whether you create a text or a file-based document. However, once you have set the document properties, you now have access to the Attached File section.	Document	Documents
Create a text document	This button opens the new document page. The properties section is the same whether you create a text or a file-based document. However, once you have set the document properties,	Document	Documents

Field	Description	Applicable to	Header
	you now have access to the Paragraphs section..		
Edit this paragraph	Column that shows the Edit link to modify the content of a paragraph.	Document	Paragraphs
File Name	Field indicating the name of the file attached to the document, in case of a file-based document.	Document	Attached File
Format	Indicates the format of the document. Possible values are PDF or HTML.	Document	Documents
Name	Alpha-numerical value indicating the name of an element (document, paragraph, etc.). The name is usually shown along with the code in a listing.	Document	Properties
Preview	Button that allows to see a preview of the document.	Document	Paragraphs
Remove	Button that allows to remove a paragraph from a document. This action does not delete the paragraph from the list of available paragraphs.	Document	Paragraphs
Reorder	Button that opens the Reorder Paragraphs page, where the order of paragraphs included in the document can be defined.	Document	Paragraphs
Status	Status of the selected element. Possible values are: Draft - When in a Draft status, an element can only be edited but not applied or associated to another element. To be able to use a Draft element, it must first be activated. Once the status of an element has changed from Draft to another status, it can never be in a Draft status again. Only draft elements can be deleted. Inactive - When in an Inactive status, an element can only be edited but not applied or associated to another element. To be able to use an Inactive element, it must first be activated. Active - When in a Active status, an element can be edited, applied or associated to another element.	Document	Properties
Text	Field where you enter the text content of your paragraph as well as all the variables that you want to include.	New Paragraph	Properties

Working with Message Templates

Message Template

A message template serves as a model for email messages that are sent via Performance.

Correspondence can be sent for various situations, each corresponding to a different message template type. These message templates are created from text document or from file-based documents. After they have been created and activated, they can be selected as feedback correspondence or as reminder and summary emails.

There are many different types of templates, each corresponding to a specific situation:

- Standard notification for feedback approval completion
- Standard notification for a feedback approval
- Standard notification for review process assignment
- Standard notification for review process completion
- Standard notification for goal plan approval task assignment
- Standard notification for goal plan approval completion
- Standard notification for succession plan approval task assignment
- Standard notification for succession plan approval completion
- Standard notification for employee change approval task assignment
- Standard notification for employee change approval completion
- Standard notification for development plan approval task assignment
- Standard notification for development plan approval task completion
- Standard notification for review feedback request
- Standard notification for review feedback response
- Standard notification for employee goal feedback request
- Standard notification for employee goal feedback response
- Standard notification for succession plan feedback request
- Standard notification for succession plan feedback response
- Standard notification for career plan feedback request
- Standard notification for career plan feedback response
- Standard notification for development plan feedback request
- Standard notification for development plan feedback response
- Standard notification for a feedback request sent from journal
- Standard notification for a response to a feedback request sent from journal
- Standard notification for summary email

Viewing a Message Template

Viewing a message template allows you to view its properties, content and history information.

Configuration > [Performance] Administration > [Global Configurations] Message Templates

1. In the Message Templates page, click the name of the message template that you want to view.

The message template information displays in the Template page, which presents the name of the selected template next to the page title.

Once displayed in view mode, the message template can then be edited, activated or deactivated and previewed.

Creating a Message Template

Creating a message template allows to define a template to be used as a model when creating email messages.

Configuration > [Performance] Administration > [Global Configurations] Message Templates

1. In the Message Templates page, click Create next to Templates.
2. In the New Message Properties page, enter the appropriate information.

   Make sure to select the proper type as this determines in which situation the template will be used.

   If needed, variables can be used in the To, Cc, Bcc and Subject fields.
3. Click Save.
4. Back to the Template page, create the content of the template by either clicking Select a document or Custom Content.
5. Depending on the previous step, do one of the following.
   - If selecting a document, in the Paragraph-Based Document Selector page, select the document you wish to use as a template.
   - If creating custom content, in the Message Template Content Editor page, type in the content of the message and insert variables as needed by clicking on the desired variable when the cursor is at the desired insertion point in the message box.
6. Click Save.

The properties and content of the newly created message template display in the Template page.

Once created, the message template needs to be activated to make it available when selecting an email message for notifications and correspondence.

Editing a Message Template

Editing a message template is used to modify the properties or the content of a message template.

Editing a message template is possible at all times. It is however suggested to deactivate the template before modifying it.

Configuration > **[Performance] Administration** > **[Global Configurations] Message Templates**

1. In the Message Templates page, click the name of the message template that you want to modify.
2. In the Template page, depending on the type of changes to make, do one of the following:
   - Click Edit next the Properties to modify the properties of the message template.
   - Click Select Document or Custom Content, depending on the existing content of the message to modify the template. For example, if the template included customized content, selecting a document instead won't be possible.
3. Click Save.

The changes made are automatically reflected in the template and in all future emails based on the template.

If you had deactivated the template, make sure to activate it again.

Previewing a Message Template

Previewing a message template allows to see how the entire content looks.

Configuration > **[Performance] Administration** > **[Global Configurations] Message Templates**

1. In the Message Templates page, click the name of the message template you wish to preview.
2. In the Message page, click Preview next to Content.

The message template displays in the preview page, as it will be when sent as an email.

Activating a Message Template

Activating a message template is done to make the template available for selection when creating messages.

Configuration > **[Performance] Administration** > **[Global Configurations] Message Templates**

1. In the Message Templates page, under Templates, click the name of the message template you want to activate.
2. In the Template page, click Activate next to the name of the message template, on the title line.

The message template shows an Active status.

Below are tasks related to message templates.

Deactivating a Message Template

Deactivating a message template is used to remove it from the list of available templates.

A message template must be active in order to be deactivated.

Configuration > **[Performance] Administration** > **[Global Configurations] Message Templates**

1. In Message Templates page, click the name of the message template that you want to deactivate.
2. In the Template page, click Deactivate next to the name of the message template, on the page title line.

The message template shows an Inactive status.

If you want to make the template available again, you will need to reactivate it.

Deleting a Message Template

Deleting a message template is used to remove it definitely from the list of templates.

Only draft message templates can be deleted.

Configuration > **[Performance] Administration** > **[Global Configurations] Message Templates**

1. In the Message Templates page, locate the message template that you want to delete.
2. Click Delete.

The message template no longer shows in the template list.

Message Template Fields

All fields related to Message Templates are presented in the table below, along with a description and possible values, when predefined. Each field also indicates the type of information it applies to and the related header.

Field	Description	Applicable to	Header
Available Variables	This field contains variables that you can insert in a paragraph. When a type of variable is selected in the first listing, the related variables are displayed in the second listing and can be selected for insertion into a paragraph.	Message Templates	Properties
Bcc	Name of the people who will receive the message without having their name showing in the recipient list.	Message Templates	Properties
Cc	Name of the people copied in the message.	Message Templates	Properties
Code	Alpha-numerical code used to identify a message template. The code is usually shown along with the name in a listing.	Message Templates	Properties
Custom Content	Link that opens the Message Template Content Editor, where you can enter content for your message template.	Message Templates	Content
Description	This field is where you can enter a description for your message template.	Message Templates	Properties

Field	Description	Applicable to	Header
Document used for message content	Name of the document used in the content of the message template.	Message Templates	Content
Name	Alpha-numerical value indicating the name of a message template. The name is usually shown along with the code in a listing.	Message Templates	Properties
Preview	Link that opens a preview of the message template.	Message Templates	Content
Select Document	Link that opens the Paragraph-based Document Selector, from which you can select a document that will be used in your message template.	Message Templates	Content
Send as read-only attachment	When activated, this field indicates that the message will be sent as an attached file and cannot be modified.	Message Templates	Properties
Status	Status of the selected element. Possible values are: • **Draft** - When in a Draft status, an element can only be edited but not applied or associated to another element. To be able to use a Draft element, it must first be activated. Once the status of an element has changed from Draft to another status, it can never be in a Draft status again. Only draft elements can be deleted. • **Inactive** - When in an Inactive status, an element can only be edited but not applied or associated to another element. To be able to use an Inactive element, it must first be activated. • **Active** - When in a Active status, an element can be edited, applied or associated to another element.	Message Templates	Properties
Subject	Subject of the message.	Message Templates	Properties
Text	Shows the content of the message template.	Message Templates	Content
To	Name of the recipient of the message.	Message Templates	Properties
Type	Type of the message template. Possible values are: • Standard notification for feedback approval completion	Message Templates	Properties

Field	Description	Applicable to	Header
	• Standard notification for a feedback approval • Standard notification for review process assignment • Standard notification for review process completion • Standard notification for goal plan approval task assignment • Standard notification for goal plan approval completion • Standard notification for succession plan approval task assignment • Standard notification for succession plan approval completion • Standard notification for employee change approval task assignment • Standard notification for employee change approval completion • Standard notification for development plan approval task assignment • Standard notification for development plan approval task completion • Standard notification for review feedback request • Standard notification for review feedback response • Standard notification for employee goal feedback request • Standard notification for employee goal feedback response • Standard notification for succession plan feedback request • Standard notification for succession plan feedback response • Standard notification for career plan feedback request • Standard notification for career plan feedback response		

Field	Description	Applicable to	Header
	• Standard notification for development plan feedback request • Standard notification for development plan feedback response • Standard notification for a feedback request sent from journal • Standard notification for a response to a feedback request sent from journal		

Document and Message Variables

The following table lists all the variable categories as well as all corresponding variables that can be used in message documents and templates.

Variable Category or Variable	Description	Applicable to
Approval-Process-Context	Category of variables associated with the context of the approval process.	Message Documents and Templates
Approval-Process-Context.ApprovalProcessContextOwnerEmail	Email address of the person who requested the approval.	Message Documents and Templates
Approval-Process-Context.ResultComments	List of approver comments, in the following form: • first comment (first approver name) • second comment (second approver name) • third comment (third approver comment) • and so on	Message Documents and Templates
Development-Plan.DevelopmentPlanLink	Clickable link for going directly to a development plan requiring approval.	Message Documents and Templates
EmployeeChangeRequest	Category of variables associated to employee change requests.	Message Documents and Templates
EmployeeChangeRequest.EmployeeChangeRequ	Status of the employee change request.	Message Documents and Templates
EmployeeChangeRequest.EmployeeChangeRequ	Job role of the employee before the change request.	Message Documents and Templates
EmployeeChangeRequest.EmployeeChangeRequ	Location of the employee before the change request.	Message Documents and Templates
EmployeeChangeRequest.EmployeeChangeRequ	Email address of the current manager of the employee, that is before the change is performed.	Message Documents and Templates

Variable Category or Variable	Description	Applicable to
EmployeeChangeRequest.EmployeeChangeRequ	First name of the current manager of the employee, that is before the change is performed.	Message Documents and Templates
EmployeeChangeRequest.EmployeeChangeRequ	Full name (First Initial Last) of the current manager of the employee, that is before the change is performed.	Message Documents and Templates
EmployeeChangeRequest.EmployeeChangeRequ	Last name of the current manager of the employee, that is before the change is performed.	Message Documents and Templates
EmployeeChangeRequest.EmployeeChangeRequ	Middle initial of the current manager of the employee, that is before the change is performed.	Message Documents and Templates
EmployeeChangeRequest.EmployeeChangeRequ	Name prefix of the current manager of the employee, that is before the change is performed.	Message Documents and Templates
EmployeeChangeRequest.EmployeeChangeRequ	Name suffix of the current manager of the employee, that is before the change is performed.	Message Documents and Templates
EmployeeChangeRequest.EmployeeChangeRequ	Name of the current organization for which works the employee, that is before the change is performed.	Message Documents and Templates
EmployeeChangeRequest.EmployeeChangeRequ	Email address of the employee for whom an employee change is performed.	Message Documents and Templates
EmployeeChangeRequest.EmployeeChangeRequ	First name of employee for whom an employee change is performed.	Message Documents and Templates
EmployeeChangeRequest.EmployeeChangeRequ	Full name (First Initial Last) of employee for whom an employee change is performed.	Message Documents and Templates
EmployeeChangeRequest.EmployeeChangeRequ	Last name of employee for whom an employee change is performed.	Message Documents and Templates
EmployeeChangeRequest.EmployeeChangeRequ	Middle initial of employee for whom an employee change is performed.	Message Documents and Templates
EmployeeChangeRequest.EmployeeChangeRequ	Name prefix of employee for whom an employee change is performed.	Message Documents and Templates
EmployeeChangeRequest.EmployeeChangeRequ	Name suffix of employee for whom an employee change is performed.	Message Documents and Templates
EmployeeChangeRequest.EmployeeChangeRequ	Email address of the new manager, that is the manager to whom the employee is requested to change to.	Message Documents and Templates
EmployeeChangeRequest.EmployeeChangeRequ	First name of the new manager, that is the manager to whom the employee is requested to change to.	Message Documents and Templates
EmployeeChangeRequest.EmployeeChangeRequ	Full name of the new manager, that is the manager to whom the employee is requested to change to.	Message Documents and Templates

Variable Category or Variable	Description	Applicable to
EmployeeChangeRequest.EmployeeChangeRequ	Last name of the new manager, that is the manager to whom the employee is requested to change to.	Message Documents and Templates
EmployeeChangeRequest.EmployeeChangeRequ	Middle initial of the new manager, that is the manager to whom the employee is requested to change to.	Message Documents and Templates
EmployeeChangeRequest.EmployeeChangeRequ	Name prefix of the new manager, that is the manager to whom the employee is requested to change to.	Message Documents and Templates
EmployeeChangeRequest.EmployeeChangeRequ	Name suffix of the new manager, that is the manager to whom the employee is requested to change to.	Message Documents and Templates
EmployeeChangeRequest.EmployeeChangeRequ	New job role requested for the employee.	Message Documents and Templates
EmployeeChangeRequest.EmployeeChangeRequ	New location requested for the employee.	Message Documents and Templates
EmployeeChangeRequest.EmployeeChangeRequ	New organization requested for the employee.	Message Documents and Templates
Feedback-Request	Category of variables associated to feedback requests and responses.	Message Documents and Templates
Feedback-Request.DueDate	Date by which a feedback response is requested.	Message Documents and Templates
Feedback-Request.FeedbackReplyAuthorName	Name of the user who has been asked to provide feedback.	Message Documents and Templates
Feedback-Request.GoalBusinessPeriodName	Name of the business period associated to the goal when feedback is requested for an employee goal plan.	Message Documents and Templates
Feedback-Request.Priority	Priority level of the feedback request.	Message Documents and Templates
Feedback-Request.RequesterName	Name of the user requesting feedback.	Message Documents and Templates
Feedback-Request.SubjectEmployeeName	Name of the employee about whom feedback is requested.	Message Documents and Templates
Feedback-Request.SuccessionPlanPositionName	Name of the position for which feedback is requested.	Message Documents and Templates
Feedback.FeedbackAuthorName	This is the approver who is providing approval of the feedback request.	Message Documents and Templates
Feedback.RequesterName	This is the person who is providing feedback and making the request to have it approved.	Message Documents and Templates
Feedback.SubjectEmployeeName	This is the name of the employee about whom feedback is requested. In the case that the feedback is requested on a succession plan this variable will be empty.	Message Documents and Templates
Goal-Plan	Category of variables related to an employee's goal plan.	Message Documents and Templates
Goal-Plan.GoalPlanApprovalStatus	Approval status of the goal plan, which can be: Not Started, In Progress, Approved or Rejected.	Message Documents and Templates

Variable Category or Variable	Description	Applicable to
Goal-Plan.GoalPlanBusinessPeriodName	Name of the business period that is covered by the goal plan.	Message Documents and Templates
Goal-Plan.GoalPlanEmployeeEmail	Email address of the employee who is the subject of the goal plan.	Message Documents and Templates
Goal-Plan.GoalPlanEmployeeFirstName	First name of the employee who is the subject of the goal plan.	Message Documents and Templates
Goal-Plan.GoalPlanEmployeeFullName	Full name (First Initial Last) of the employee who is the subject of the goal plan.	Message Documents and Templates
Goal-Plan.GoalPlanEmployeeLastName	Last name of the employee who is the subject of the goal plan.	Message Documents and Templates
Goal-Plan.GoalPlanEmployeeMiddleInitial	Middle initial of the employee who is the subject of the goal plan.	Message Documents and Templates
Goal-Plan.GoalPlanEmployeeNamePrefix	Name prefix of the employee who is the subject of the goal plan, such as Dr.	Message Documents and Templates
Goal-Plan.GoalPlanEmployeeNameSuffix	Name suffix of the employee who is the subject of the goal plan, such as PhD.	Message Documents and Templates
Goal-Plan.GoalPlanLink	Clickable link for going directly to a goal plan requiring approval.	Message Documents and Templates
Goal-Plan.GoalPlanManagerEmail	Email of the current manager of the employee who is the subject of the goal plan.	Message Documents and Templates
Goal-Plan.GoalPlanManagerFullName	Full name (First Initial Last) of the current manager of the employee who is the subject of the goal plan.	Message Documents and Templates
Review-Employee	Category of variables associated to employee self-assessments.	Message Documents and Templates
Review-Employee-Request	Category of variables associated to employee reviews generated for a given request.	Message Documents and Templates
Review-Employee-Request.EmployeeJobRoleDescription	Description of the employee's job role.	Message Documents and Templates
Review-Employee-Request.EmployeeJobRoleName	Name of the employee's job role.	Message Documents and Templates
Review-Employee-Request.EmployeeJobRoleQualifications	Qualifications tied to the employee's job role.	Message Documents and Templates
Review-Employee-Request.EmployeeJobRoleResponsibilities	Responsibilities tied to the employee's job role.	Message Documents and Templates
Review-Employee-Request.ReviewDefinitionTitle	Title of the review definition used to generate the employee's review.	Message Documents and Templates
Review-Employee-Request.ReviewEndDate	End date of the review period, which is the same as for the review request.	Message Documents and Templates
Review-Employee-Request.ReviewGroupProcessOwnerEmail	Email address of the review group administrator, which is the HR Administrator who is the owner of the reviews belonging to the review group.	Message Documents and Templates

Variable Category or Variable	Description	Applicable to
Review-Employee-Request.ReviewGroupProcessOwnerEmployeeId	Employee Id of the review group administrator, which is the HR Administrator who is the owner of the reviews belonging to the review group.	Message Documents and Templates
Review-Employee-Request.ReviewGroupProcessOwnerFullName	Full name (First Initial Last) of the review group administrator, which is the HR Administrator who is the owner of the reviews belonging to the review group.	Message Documents and Templates
Review-Employee-Request.ReviewRequestAssignmentDate	Date the reviews are generated, as per the review request	Message Documents and Templates
Review-Employee-Request.ReviewRequestEmployeeEvaluationTask	Date on which reviews become available to the manager.	Message Documents and Templates
Review-Employee-Request.ReviewRequestName	Name of the review request associated to the review.	Message Documents and Templates
Review-Employee-Request.ReviewRequestProcessOwnerEmail	Email address of the administrator of the associated review request.	Message Documents and Templates
Review-Employee-Request.ReviewRequestProcessOwnerEmployeeI	Employee Id of the administrator of the associated review request.	Message Documents and Templates
Review-Employee-Request.ReviewRequestProcessOwnerFullName	Full name (First Initial Last) of the administrator of the associated review request.	Message Documents and Templates
Review-Employee-Request.ReviewRequestSelfEvaluationTaskAssig	Date on which the self-assessment become available to the employee, as per the self-assessment assignment date defined on the review request.	Message Documents and Templates
Review-Employee-Request.ReviewStartDate	Start date of the review period, which is the same as for the review request.	Message Documents and Templates
Review-Employee-Request.ReviewType	Review type, as specified in the associated review request.	Message Documents and Templates
Review-Employee.Department	Department of the employee being evaluated.	Message Documents and Templates
Review-Employee.Email	Email of the employee being evaluated.	Message Documents and Templates
Review-Employee.EmployeeId	Employee Id of the employee being evaluated.	Message Documents and Templates
Review-Employee.FirstName	First name of the employee being evaluated.	Message Documents and Templates
Review-Employee.FullName	Full name (First Initial Last) of the employee being evaluated.	Message Documents and Templates
Review-Employee.LastName	Last Name of the employee being evaluated.	Message Documents and Templates
Review-Employee.MiddleInitial	Middle initial of the employee being evaluated.	Message Documents and Templates
Review-Employee.NamePrefix	Name prefix of the employee being evaluated, such as Dr.	Message Documents and Templates
Review-Employee.NameSuffix	Name suffix of the employee being evaluated, such as PhD.	Message Documents and Templates
Review-Employee.ReviewClosedDate	Date the self-assessment was completed and closed.	Message Documents and Templates

Variable Category or Variable	Description	Applicable to
Review-Employee.ReviewDraftDate	Date the employee wrote his self-assessment.	Message Documents and Templates
Review-Employee.ReviewOverallScore	Performance review's overall rating given by the manager.	Message Documents and Templates
Review-Employee.ReviewOverallScoreComment	Global comment provided by manager in the Summary section of the review.	Message Documents and Templates
Review-Employee.ReviewOverallScoreRatingValue	Rating value associated to the overall rating of employee's self-assessment, taken from the rating model of the review, such as '5'. This value is set based on the calculated overall rating and the rounding value.	Message Documents and Templates
Review-Employee.ReviewOverallScoreRatingValueName	Name associated to the rating value, such as 'Outstanding Performance'.	Message Documents and Templates
Review-Employee.ReviewReleasedDate	Date the self-assessment was released by the employee.	Message Documents and Templates
Review-Employee.ReviewStatus	Status of the self-assessment, which can be: New, Draft, To Be Approved, Under Approval, Approved, Released, Acknowledgment Requested, Acknowledged, Cancelled, Closed.	Message Documents and Templates
Review-Employee.Title	Title of the employee being evaluated.	Message Documents and Templates
Review-Employee.WorkPhone	Work phone number of the employee being evaluated.	Message Documents and Templates
Review-Employee.WorkPhoneExtension	Work phone extension of the employee being evaluated.	Message Documents and Templates
Review-Manager	Category of variables associated to performance reviews performed by managers.	Message Documents and Templates
Review-Manager.Department	Department of the manager completing the performance review.	Message Documents and Templates
Review-Manager.Email	Email address of the manager completing the performance review.	Message Documents and Templates
Review-Manager.EmployeeId	Employee Id of the manager completing the performance review.	Message Documents and Templates
Review-Manager.FirstName	First name of the manager completing the performance review..	Message Documents and Templates
Review-Manager.FullName	Full name (First Initial Last) of the manager completing the performance review.	Message Documents and Templates
Review-Manager.LastName	Last name of the manager completing the performance review.	Message Documents and Templates
Review-Manager.MiddleInitial	Middle initial of the manager completing the performance review.	Message Documents and Templates
Review-Manager.NamePrefix	Name prefix of the manager completing the performance review, such as Dr.	Message Documents and Templates
Review-Manager.NameSuffix	Name suffix of the manager completing the performance review, such as PhD.	Message Documents and Templates

Variable Category or Variable	Description	Applicable to
Review-Manager.ReviewAcknowledgementRequestedDa	Date a review acknowledgment was requested.	Message Documents and Templates
Review-Manager.ReviewApprovedDate	Date the employee's performance review was approved.	Message Documents and Templates
Review-Manager.ReviewCancelledDate	Date the employee's performance review was cancelled.	Message Documents and Templates
Review-Manager.ReviewClosedDate	Date the employee's performance review was finalized and closed.	Message Documents and Templates
Review-Manager.ReviewDraftDate	Date the manager wrote the employee's performance review.	Message Documents and Templates
Review-Manager.ReviewEmployeeAcknowledgementCor	Comments provided by the employee when acknowledging the review meeting.	Message Documents and Templates
Review-Manager.ReviewEmployeeAcknowledgementDat	Date the manager has set the meeting acknowledgment.	Message Documents and Templates
Review-Manager.ReviewFinalComment	Comments provided by the manager when closing the employee's performance review.	Message Documents and Templates
Review-Manager.ReviewMeetingComment	Comments provided by the manager upon acknowledgment of the review meeting.	Message Documents and Templates
Review-Manager.ReviewMeetingDate	Date of the review meeting.	Message Documents and Templates
Review-Manager.ReviewOverallScore	Overall rating given by the manager when closing the review.	Message Documents and Templates
Review-Manager.ReviewOverallScoreComment	Comments provided by the manager when closing the review.	Message Documents and Templates
Review-Manager.ReviewOverallScoreRatingValue	Rating value associated to the manager's overall rating of the employee's performance review, taken from the rating model of the review, such as '5'. This value is set based on the calculated overall rating and the rounding value.	Message Documents and Templates
Review-Manager.ReviewOverallScoreRatingValueName	Name associated to the rating value, such as 'Outstanding Performance'.	Message Documents and Templates
Review-Manager.ReviewReleasedDate	Date the employee's performance review was released by the manager.	Message Documents and Templates
Review-Manager.ReviewStatus	Status of the employee's performance review, which can be: New, Draft, To Be Approved, Under Approval, Approved, Released, Acknowledgment Requested, Acknowledged, Cancelled, Closed.	Message Documents and Templates
Review-Manager.Title	Title of the manager completing the employee's performance review.	Message Documents and Templates
Review-Manager.WorkPhone	Work phone number of the manager completing the employee's performance review.	Message Documents and Templates
Review-Manager.WorkPhoneExtension	Work phone extension of the manager completing the employee's performance review.	Message Documents and Templates

Variable Category or Variable	Description	Applicable to
Review.ReviewLink	Clickable link for going directly to performance review requiring approval.	Message Documents and Templates
Succession-Plan	Category of variables associated to an employee's succession plan.	Message Documents and Templates
Succession-Plan.SuccessionPlanApprovalStatus	Approval status of the succession plan, which can be Not Started, In Progress, Approved or Rejected.	Message Documents and Templates
Succession-Plan.SuccessionPlanDescription	Description of the succession plan, wish is currently only displayed in the HR Admin Tools.	Message Documents and Templates
Succession-Plan.SuccessionPlanJobPositionDescription	Description of the job position for which the succession plan has been created.	Message Documents and Templates
Succession-Plan.SuccessionPlanJobPositionEmployeeFirstN	First name of the current job position incumbent for which the succession plan has been created.	Message Documents and Templates
Succession-Plan.SuccessionPlanJobPositionEmployeeFullNa	Full name (First Initial Last) of the current job position incumbent for which the succession plan has been created.	Message Documents and Templates
Succession-Plan.SuccessionPlanJobPositionEmployeeLastN	Last name of the current job position incumbent for which the succession plan has been created.	Message Documents and Templates
Succession-Plan.SuccessionPlanJobPositionEmployeeMiddl	Middle initial of the current job position incumbent for which the succession plan has been created.	Message Documents and Templates
Succession-Plan.SuccessionPlanJobPositionEmployeeName	Name prefix of the current job position incumbent for which the succession plan has been created, such as Dr.	Message Documents and Templates
Succession-Plan.SuccessionPlanJobPositionEmployeeName	Name suffix of the current job position incumbent for which the succession plan has been created, such as PhD.	Message Documents and Templates
Succession-Plan.SuccessionPlanJobPositionManagerEmail	Email address of the manager responsible for the job position.	Message Documents and Templates
Succession-Plan.SuccessionPlanJobPositionManagerFullNar	Full name (First Initial Last) of the manager responsible for the job position.	Message Documents and Templates
Succession-Plan.SuccessionPlanJobPositionName	Name of the job position.	Message Documents and Templates
Succession-Plan.SuccessionPlanLink	Clickable link for going directly to a succession plan requiring approval.	Message and Documents Templates
Summary-Email.PendingDevelopmentPlanApprovalTaskLir	Clickable link for going directly to Development Plan tasks that need completing.	Message and Documents Templates
Summary-Email.PendingFeedbackApprovalTaskLink	Clickable link for going directly to Feedback tasks that need completing.	Message and Documents Templates
Summary-Email.PendingGoalPlanApprovalTaskLink	Clickable link for going directly to Goal Plan tasks that need completing.	Message and Documents Templates

Variable Category or Variable	Description	Applicable to
Summary-Email.PendingReviewApprovalTaskLink	Clickable link for going directly to Performance Review tasks that need completing.	Message and Documents Templates
Summary-Email.PendingReviewWorkflowTaskLink	Clickable link for going directly to Workflow tasks that need completing.	Message and Documents Templates
Summary-Email.PendingSuccessionPlanApprovalTaskLink	Clickable link for going directly to Succession Plan tasks that need completing.	Message and Documents Templates
Task	Category of variables associated to tasks.	Message Documents and Templates
Task-Participant	Category of variable associated to the participant of the task, which is the employee to whom the task is assigned.	Message Documents and Templates
Task.AssigneesNames	Full name (First Initial Last) of all participants, coma separated.	Message Documents and Templates
Task.AssignmentDate	Date the task is assigned.	Message Documents and Templates
Task.CreationDate	Date the task was initially created by the owner.	Message Documents and Templates
Task.DueDate	Due date of the assigned task.	Message Documents and Templates
Task.Name	Name of the task, copied from the task definition.	Message Documents and Templates
Task.OwnerEmailAddress	Email address of the owner of the task, which can be the manager or the HR administrator, depending on the task, as defined in the User Account.	Message Documents and Templates
Task.OwnerFax	Fax number of the owner of the task, which can be the manager or the HR administrator, depending on the task, as defined in the User Account.	Message Documents and Templates
Task.OwnerFirstName	First name of the owner of the task, which can be the manager or the HR administrator, depending on the task.	Message Documents and Templates
Task.OwnerFullName	Full name (First Initial Last) of the owner of the task, which can be the manager or the HR administrator, depending on the task.	Message Documents and Templates
Task.OwnerLastName	Last name of the owner of the task, which can be the manager or the HR administrator, depending on the task.	Message Documents and Templates
Task.OwnerTelephone	Telephone number of the owner of the task, which can be the manager of the HR administrator, depending on the task, as defined in the User Account.	Message Documents and Templates
Task.PriorityType	Task priority type, such as Low, Normal, High.	Message Documents and Templates
Task.Status	Status of the task, which can be CANCELLED, COMPLETED, ERROR, IN_PROGRESS, NOT_STARTED, ON_HOLD	Message Documents and Templates
Task.Type	Type of the assigned task, which can be Self-Assessment, Employee Performance Review,	Message Documents and Templates

Variable Category or Variable	Description	Applicable to
	Feedback Request, Network Invitation, Goal Plan Approval, Succession Plan Approval, etc.	
TaskParticipant.EmailAddress	Email address of the participant of the task, as defined in the User Account.	Message Documents and Templates
TaskParticipant.Fax	Fax number of the participant of the task, as defined in the User Account.	Message Documents and Templates
TaskParticipant.FirstName	First name of the participant of the task, as defined in the User Account.	Message Documents and Templates
TaskParticipant.FullName	Full name (First Initial Last) of the participant of the task, as defined in the User Account.	Message Documents and Templates
TaskParticipant.LastName	Last name of the participant of the task, as defined in the User Account.	Message Documents and Templates
TaskParticipant.Telephone	Phone number of the participant of the task, as defined in the User Account.	Message Documents and Templates

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:

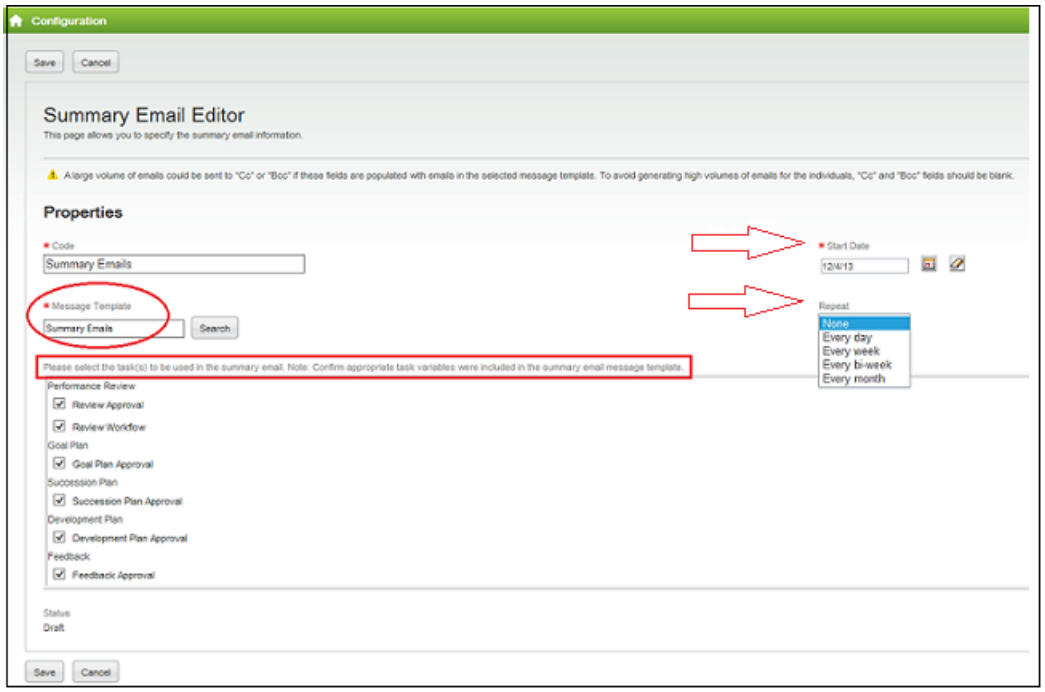
- Review Approval
- Review Workflow
- Goal Plan Approval
- Succession Plan Approval
- Development Plan Approval
- Feedback Approval

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,

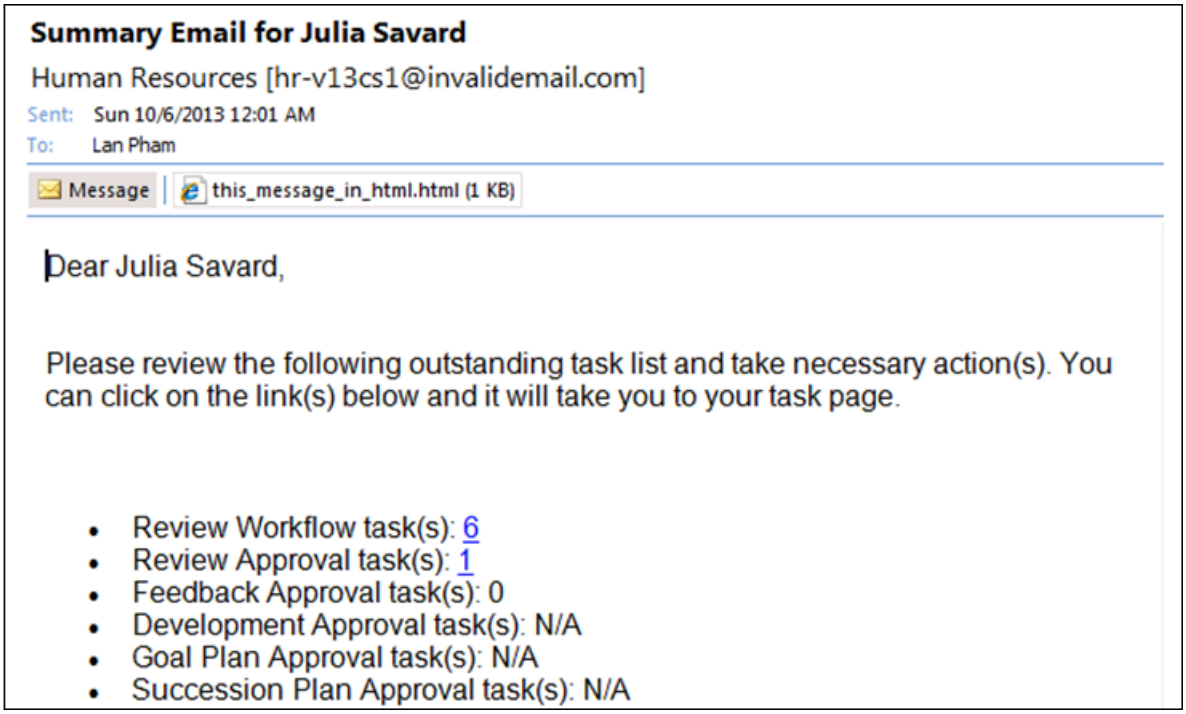
Administrators create or select the message template to be used in the summary email. The *Standard notification for summary email* template is available for summary emails along with the *Available Variables* to support summary emails.

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.



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**

To Create a Summary Email

A paragraph with the appropriate Summary Email variables, a Summary Email document and a *Standard notification for summary email* template need to be created and available for use.

Configuration > [Performance] Administration > [Global Configurations] > Summary Emails

1. Select **Create**.
2. Enter a *Code*, the *Start Date* of when this email is to begin, and the frequency this email is to be sent by selecting a value in *Repeat* dropdown.
3. Search for the Summary Email message template and select.

4. Select the tasks to be used in the email and select **Save**.

The summary email is now configured and will be sent automatically at the time intervals defined.

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	Sensitivity of email messages sent from the system. Possible values are: • Confidential • Normal • Personal • Private	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.

Working with Feedback Correspondence

Setting Feedback Requests and Responses

Messages templates can be set for feedback requests, responses, and approvals and then selected as an email notification to be sent to the user's email address when a feedback is requested or provided. If you want to incorporate a feedback approval process, see *Feedback Approval* for setting and message template details.

Configuration > **[Performance] Administration** > **[Global Configurations] Message Templates**

Configuration > **[Performance] Administration** > **[Global Configurations] Feedback Correspondence**

1. From the **Message Templates** page create, either from an existing document or from scratch, the feedback message template with the desired request or response notification type and the Feedback-Request variable group.
2. Activate the feedback request or feedback response message template to make it available for selection.
3. From the **Feedback Correspondence** page, click **Edit** to select the desired feedback request template and/or feedback response template for the desired modules.

   Feedback notifications are available for feedback requests or responses originating from goal plans, performance reviews succession plans, career plans, development plans and the feedback journals.
4. Save your selections.

   If no message template displays in the list or if the one you just created does not appear, make sure you have activated the template.

The message template you have selected will be sent when a feedback request or response is sent, with the information as per the chosen variables in the message template.

Configuring Feedback

Even if feedback is always available, there are a few settings that provide the ability to define the behavior of feedback.

Configuration > **[Taleo Performance] Administration** > **[Global Configurations] Settings**

1. Refine the settings to find the Feedback category settings.
2. Depending on the desired feedback behavior, define settings.

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 an employee goal or development activity.

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 is 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.

To Perform Feedback Deletion

Prerequisites

- System administrator access with Integrator role.
- Access to, working knowledge of and experience with using TCC.
- Zip file (feedbackdelete.zip) with template files listed below.

Note: Obtain the Zip file from one of the two following locations:

1. **My Oracle Support (MOS).** Where the Performance 13C Release Notes are posted. (URL https://mosemp.us.oracle.com/epmos/faces/DocumentDisplay)
2. **Taleo Knowledge Exchange.** In the Topics > Enterprise Performance > Documents section. (URL http://knowledgeexchange.taleo.com/login.jspa)

Unzip the template files (especially template.txt and transformfeedback.xsl) to a directory on your local machine and have them available for when you perform the feedback deletion process.

ZIP File Contents	
File Name	**Purpose**
template.txt	Template TXT header file for your use. Specifies header information for the CSV export file. This file is needed to do the rich-text-to-plain-text column transformation. The post-processing transformation is done post-export, since this type of transformation is typically not done for regular TCC exports.
transformfeedback.xsl	Template XSL transformation file for your use. Specifies processing information for post-processing transformation of CSV export file. This file is needed to convert rich text file to plain text. The post-processing transformation is done post-export, since this type of transformation is typically not done for regular TCC exports.
feedback_sq.xml	Example XML export file provided for your reference. Specifies what needs to be exported and in what format: columns, aliases for columns, paths for the columns, filters, what output format will be defined for the export file (e.g. CSV or TXT), and whether the output file will contain a header row. The feedback_sq.xml is created using the New Export Wizard. In the example procedure below, we are recommending using the wizard to generate the version of this file needed for the export.
feedbackExport_cfg.xml	Example XML configuration file provided for your reference. Specifies names and locations of how to get export data (Request, e.g. feedback_sq.xml); where to store the output (Response, e.g. export

ZIP File Contents	
File Name	**Purpose**
	CSV); what template to be used for the export (e.g. template.txt), and whether any post-processing file (transformfeedback.xsl) is used. The feedbackExport_cfg.xml is created using the New Configuration Wizard. In the example procedure below, we are recommending using the wizard to generate the version of this file needed for the export.

Process Example. The following is an example detailing the steps in the Feedback Deletion process:

Step One: 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.

In this step you export feedback content to a CSV file. Feedback content can contain HTML formatting code if it was originally entered using the rich text editor field. The export includes a post-processing transformation to cleanse the CSV file's feedback content of any such HTML code, making the feedback content readable as plain text.

Open TCC

a. Click the start icon for the TCC.

b. On the Ping the Taleo Product screen enter the following:

- Endpoint server.
- Host server.
- Authentication information.

c. Click Ping.

Create Export

a. In the menu bar select New > Export Wizard.

b. In Select an Exportable Entity, choose the Feedback data model.

c. In Template, select Create New Export.

d. Click Finish. The New Export screen opens.

e. In Outline, click General.

f. In the General section, under Other Information, set the Export Mode to T-XML.

g. In Outline, click Projections.

h. Build the list of columns for the export file (e.g. Author First and Last, Comment ID#, Feedback Content). Under Model Entity Structure select a field desired for your export file and drag/drop it into the Projections section. (For example: Author Last Name, Author First Name, ID Number and Feedback Content. It may be all you may need are ID Number and Feedback Content.)

> **Note:** It may be all you need are the ID Number and Feedback Content fields in your CSV file to locate any bad content. Other useful fields might be one of the dates (Creation, Last Modified, or Sent.) You can make this determination of what fields to export to the CSV file.

Note: You do not need to add aliases for the fields. The template.txt headers override any aliases created for the export columns on this page.

i. In Outline, click Filters.

j. Click Add to specify filter values to reduce the number of rows of data exported. For example, you might want to narrow down the date to when the content was last updated, in which case you define a filter condition against Last Modified field.

k. In the Filter dialog select Add a Simple Filter option.

l. In the One Parameter Operator Filter section enter the following:

- Set Value to Last Modified Date.
- Set Data Type to Field.
- Set Operator to Greater Than or Equal To.
- Set the second Value to the last date you checked for inappropriate data (e.g. 6-months ago on 2013-07-02).
- Set the second Data Type to Date.

This fictional example reduces the export data to content entered on or after July 2, 2013, the last time you checked for inappropriate data. Another useful set of filter columns might be Author First and Last Name, if you want to only export feedback provided by a particular person.

m. Save the modifications to the file as feedback2_sq.xml on your local directory.

Create the Configuration

a. To set up the configurations select New > Configuration Wizard.

b. On the Content screen, set to Based on Export Specification and set the filename to feedback2_sq.xml. Click Next.

c. On the Environment Information screen, set the Product to yours (such as Performance 13C), and the Endpoint to your zone (such as Default W03953.wwcorp.net).

d. Click Finish. The New Configuration, General screen displays.

e. Set up the Request and Response information.

- Under Request, set the Format to SQ-XML. Select Pre-defined Value and in File enter feedback2_sq.xml file.
- Under Response, set the response type to Text. Select Pre-defined Value and in File enter the desired export CSV file name (e.g. feedbackexport1.csv).

f. Under Outline, select Post-Processing to add the post-processing transformation that converts the rich text to plain text. Click Add.

g. Select "Add a new XSL based transformation step" and click OK.

h. The Post-processing screen opens.

i. In Transform with XSL, fill-in the location of the XSL transformation file (transformationfeedback.xsl) and header template file (template.txt) on your local machine.

j. Set the export mode to T-XML and the output format to Text.

Note: The columns in the export file must match those in the template.txt and transformfeedback.xsl files. You will need to edit the files to ensure the columns and column orders match. It is critical that the listed column order must match, and as best practice, the field name labels match the referenced columns, so they are consistent.

k. Save the configuration file to your local machine as feedbackexport1_cfg.xml.

Run the Export Process With Transformation

a. Click the Process (Gear) button on the top toolbar to start the export with transformation.

b. The URL link to the output file appears in the right side TCC Monitoring pane.

c. Click the link to view the CSV output file.

d. The feedback content is stripped of any HTML formatting code, converted to plain text, and transformed to CSV format.

e. The CSV output file bears the filename you gave it on the New Configuration, Post-processing page.

Step Two: Use Excel to Select Rows in the CSV File for Removal, Then use the TCC to Run an Import Operation to Delete Them from the Production Database.

In this step 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.

Use Excel to Select Rows in the CSV File for Removal

a. Open the output CSV file from Step One (e.g. feedbackexport1.csv) in Excel.

b. Review the feedback content for each row to identify any inappropriate or inaccurate feedback that needs to be deleted.

c. Manually remove the rows of data for all desired content you do not want deleted from the database, leaving only the header row and the rows for the undesired content you want to delete.

d. Save your changes as feedbackdeleteinput.csv.

Use the TCC to Run an Import Operation to Delete Them from the Production Database

Create a New Import

a. From the menu bar Select File > New > Import Wizard.

b. In the Select a Service section select Feedback.

c In the Template section, select "Use the following import template". In Template select "Basic Feedback delete". Click Finish.

d. Save the import file as feedbackdelete_ld.xml. Use the File Type selector to apply the type *_ld.xml.

e. Open the feedbackdelete_ld.xml file if it is not already open.

f. Under Outline select Columns.

g. Set the column you want to have appear in the feedback delete input file (e.g. the ID Number).

Create the Import Configuration

a. From the menu bar select File > New > Configuration.

b. On the Content screen select "Based on Input Specification, and set File to feedbackdelete_ld.xml. Click Next.

c. On the Environment Connectivity screen enter the Product (e.g. Performance 13C) and Endpoint server for your zone(e.g. W03953.wwcorp.net).

d. Click Finish.

e. Enter the Request input file (feedbackdeleteinput.csv) and Response output file (feedbackdeletoutput.csv).

f. Save the file as feedbackDelete_cfg.xml.

Run the Import Deletion Process

a. Click the Process button.

b. The URL link to the feedback delete output file (feedbackdeleteoutput.csv) displays in the TCC Monitoring pane. Click the link to open the output file.

c. You can check TCC log and the output file for deletion success or failure for each row.

What the User Sees in Feedback

Feedback deletion does not delete the feedback request or cancel a task. It clears the inappropriate feedback content and rating value from the feedback-related tasks and feedback journal. The comment text field is blanked out. The feedback rating that goes along with the comment is also reset to "Not Rated".

7 Employee Management Administration

Employee Reconcile Feature

The employee reconcile feature is offered as a service through Taleo Connect Client where two employee records can be merged.

The employee reconcile feature allows for data elements that exist in two records for a single person to be merged into a single, surviving record in the system. This feature addresses limitations in reconciling duplicate records that may exist in the system for candidates, users and employees. It eliminates duplicate entries for employees by allowing for the system to merge data from one employee record to another employee record. In cases where there is duplicate candidate data, the system allows for the candidate data to be replaced.

This feature is leveraged exclusively through integration and does not have a user interface component.

The typical scenario for using this feature would be to recover from an employee import mistake that has occurred. The reconciliation could also be used to merge an existing candidate record with an employee record imported from an HRIS system. It is not expected to have duplicate employees in the system for which we have both engaged processes. For example, it is not likely that one record has a series of goals and another record for the same person is included in a succession plan and has had multiple reviews.

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.

Enabling Team Management

Enabling Team Management gives authorized users the possibility of performing employee change requests.

Configuration > [Performance] Settings

1. In the Product Settings page, find and select the setting Enable Team Management.
2. In the Enable Team Management page, click Edit.
3. In the editor page, in the Value section, select Yes.

   By default, Team Management is set to No, thus disabled.
4. Click Save.

When enabled, Team Management is available to HR administrators via the Navigation bar's HR Administration dropdown.

Once enabled, Team Management functions can be disabled again if needed.

Defining the Job Position Behavior

Defining the job position behavior consists in specifying how the job position will be handled when an employee is moved from one manager to another.

Configuration > [Performance] Settings

1. In the Product Settings page, find and select the setting Job Position Configuration.
2. In the Job Position Configuration page, click Edit.
3. In the Editor - Job Position Configuration page, in the Value section, select the desired behavior to be applied to the job position when an employee is moved from one manager to another.
   - Move also the job position if applicable - When an employee move is requested and approved, the job position will also be moved.

   By default, the job position of an employee remains with the current manager.
4. Click Save.

Depending on the selection behavior, when an employee move is performed in Performance, the job position will either be moved to the new manager or remain with the current manager. The employee move might even not be allowed.

Configuring Team Management

Configuring Team Management allows system administrators to select the information that can be changed by authorized users when approving employee change requests and to define the applicable approval workflow.

Configuration > [Performance] Administration > [Employee Management] Team Management Configuration

1. In the Team Management Configuration page, click Edit next to Standard Fields.
2. In the Standard Field Availability Editor page, determine which information can be edited and if editable, indicate if approval is required.

   If approval is not required, any employee change that is requested will be applied automatically.
3. Click Save.
4. Back to the Team Management Configuration page, click Edit next Approval Workflow.
5. In the Approval Workflow Editor page, select from the available user roles the ones to which you want to grand approver rights and click Add.

   You can also select a specific user to be part of the approval workflow by clicking Add Users.
6. To define the order in which the approval is to be performed, sort the approvers sequentially by using the up and down arrows.
7. Click Save.

The Team Management Configuration page will show the information as it was defined.

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

Task or Action	Tasks that can be done by a collaborator	Tasks that can be done by a matrix manager*
		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.	• Yes • No (default)	Public	Matrix Management
Extended Matrix Management	Indicates if matrix manager relationships also apply to the direct reports of delegated employees.	• Yes • No (default)	Public	Matrix Management

Settings from Configuration > [SmartOrg] Settings				
Setting Name	**Setting Description**	**Possible Values**	**Security Level**	**Setting Category**
Maximum Number of Matrix Managers	Indicates the maximum number of matrix manager relationships that can be set for an employee.	• 5 (default)	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.	• 5 (default)	Public	Matrix Management
Employee Change Matrix Management Behavior	Indicates how matrix manager relationships are handled when an employee changes manager.	• Keep matrix managers • Remove matrix managers (default)	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**
Performance > Team Management > Access Talent Browser	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. 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. **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).
Performance > Performance Reviews > View - If the user is a matrix manager **Performance > Performance Reviews > Manage - If the user is a matrix manager**	This permission allows the user to view and/or manage performance reviews if designated as a matrix manager.
Performance > Goal Plans > View - If the user is a matrix manager **Performance > Goal Plans > Manage - If the user is a matrix manager**	This permission allows the user to view and/or manage goal plans if designated as a matrix manager.
Performance > Career Plans > View - If the user is a matrix manager **Performance > Career Plans > Manage - If the user is a matrix manager**	This permission allows the user to view and/or manage career plans if designated as a matrix manager.

Permissions Configuration > [SmartOrg] Administration > [Users] User Accounts	
Permission Name	**Setting Description**
Performance > Development Plans > View - If the user is a matrix manager **Performance > Development Plans > Manage - If the user is a matrix manager**	This permission allows the user to view and/or manage development plans if designated as a matrix manager.
Performance > Employee Metrics > View - If the user is a matrix manager **Performance > Employee Metrics > Manage - If the user is a matrix manager**	This permission allows the user to view and/or manage employee metrics if designated as a matrix manager.
Performance > Employee Profile > View - If the user is a matrix manager **Performance > Employee Profile > Manage - If the user is a matrix manager**	This permission allows the user to view and/or manage talent profiles if designated as a matrix manager.
Performance > Team Management > Access administration tools	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.
Performance > Team Management > Access Manage Matrix Manager	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.

Team Management Fields

Fields related to team management in Performance Administration 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
Add Users	Link opening the User Selector to choose specific users to include in the approval workflow.	Team Management	Approval Workflow
Approval Workflow	Shows the defined roles responsible for the approval of team management changes, in the applicable order.	Team Management	Approval Workflow

Field	Description	Applicable to	Header
Approval Workflow	Box that lists all selected roles to be part of the approval workflow for team management changes. In Edit mode, the roles can be reordered as desired using the up and down arrows.	Team Management	Approval Workflow
Assignment Correspondence	Field that indicates the message template to use when an approval task is assigned.	Team Management	Approval Workflow
Available Approval Roles	Box that lists all the roles that are available for approving team management changes.	Team Management	Approval Workflow
Completion Correspondence - Approval	Field that indicates the message template to use when an approval process is completed by an approval.	Team Management	Approval Workflow
Completion Correspondence - Rejection	Field that indicates the message template to use when an approval process is completed by a rejection.	Team Management	Approval Workflow
Completion Correspondence - Termination	Field that indicates the message template to use when an approval process is terminated.	Team Management	Approval Workflow
Current Job	Field used to change the current job of an employee.	Team Management	Standard Fields
Editable	Option that indicates whether the field is editable or read-only.	Team Management	Standard Fields
Location	Field used to change the location of an employee.	Team Management	Standard Fields
Manager	Field used to change the manager of an employee.	Team Management	Standard Fields
Name	Column heading showing the name of standard fields where changes can be made	Team Management	Standard Fields
Organization	Field used to change the organization of an employee.	Team Management	Standard Fields
Requires Approval	Option that indicates whether a change to the value of the field needs to be approved.	Team Management	Standard Fields

Employee Metrics Permissions Configuration

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

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

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

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

If configured to be editable, the employee metrics under the Metrics section of the Talent Profile will be editable by the authorized users.

Users need to have the proper user type permissions to be entitled to view and/or edit the employee metrics.

The *Potential*, *Promotability Readiness*, *Reassignment Candidate*, *Risk of Loss*, and *Impact of Loss* employee metrics can also be customized to have values that better represent your company's terminology and use of these metrics.

Please refer to the *list of employee metrics* to see which metric can be displayed or available where.

Configuration

The metrics are by default not displayed and not editable.

Metric configuration is performed via the following:

Location	Description
Configuration > **[Taleo Performance] Administration** > **[Employee Management] Metrics Configuration**	This section allows to define which metrics are to be displayed and which ones are to be editable. Metrics can only be edited via the Talent Profile.

Permissions and settings:

Permissions: Configuration > [SmartOrg] Administration > [Users] User Accounts	
Permission Name	**Setting Description**
Performance > **Employee Metrics** > **View**	This permission grants the user read-only access to metrics configured to be displayed.
Performance > **Employee Metrics** > **Manage**	This permission grants the user write access to metrics configured to be editable.
Compensation > **Compensation Data** > **View compensation history**	This permission grants the user read-only access to compensation history information. If the user does not have this permission, no compensation metrics will be seen.

Showing Rating Metrics as Real Values

Metrics related to ratings can be configured to display as the actual values of the rating model instead of as the normalized values used for calculations and updates.

Various metrics are used in the application to display ratings on the employee. However, for some of these metrics, the only information available is the normalized rating, that is a calculation of the actual rating expressed as a value between 0% and 100%. As this percentage value does not provide significant meaning to the customer, settings are offered to provide the possibility for customers to display the ratings as their actual values.

Note that those real ratings will only apply for displaying the metric values; the normalized ratings will still be used for all calculations and updates on the values.

CALCULATION FORMULA

N=Normalized Rating Value

C=Current Rating Numerical Value

L= Lowest Rating Numerical Value

H=Highest Rating Numerical Value

Normalized Value	Current Value
N=(C - L) / (H - L)	C=(N * (H - L)) + L

For the system to display the current metric ratings, a new service has been developed to retrieve the normalized value. This service then uses a setting and the rating dimension configured for this metric to determine the way to display the rating.

The ratings that can be shown as the actual values, and not normalized, are the following:

- Review - Current Review Status
- Review - Last Focal Review Rating
- Employee - Review Rating
- Employee - Competency Rating
- Employee - Goal Rating

Configuration

The following settings provide the ability to configure ratings to show as real values. It is important to note that these settings do not affect the performance review itself but just the employee metrics related to ratings.

Configuration > [General Configuration] Settings				
Setting Name	**Setting Description**	**Possible Values**	**Security Level**	**Setting Category**
Metric Rating Display	Indicates the display format of rating values, based on a set of predefined formats.	• As a percentage - Rating displayed as a	Public	General Settings

Configuration > [General Configuration] Settings				
Setting Name	**Setting Description**	**Possible Values**	**Security Level**	**Setting Category**
		normalized value (e.g. 70%) • In numeric format (default) - Rating displayed as a rounded numerical value (e.g. 4) • In numeric format with rating scale - Rating displayed as a rounded numerical value with the applicable rating scale (e.g. 4 [1,5]) • In text format - Rating displayed as a textual rating (e.g. Excellent) • In text and numeric format - Rating displayed as a textual rating and a rounded numerical value (e.g. Excellent (4))		
Metric Rating Model Rounding	Indicates the rounding percentage used to determine the rating value corresponding to a given score.	Any chosen value between 1 and 100.	Public	General Settings
"Review Rating" Metric Rating Model	Indicates the rating model used to determine the available values for the "Employee – Review Rating" metric.	Any active rating model	Public	General Settings
"Goal Rating" Metric Rating Model	Indicates the rating model used to determine the available values for the "Employee - Goal Rating" metric.	Any active rating model	Public	General Settings
"Competency Rating" Metric Rating Model	Indicates the rating model used to determine the available values for the "Employee - Competency Rating" metric.	Any active rating model	Public	General Settings

Ratings Displayed as Actual Values

Ratings that can be displayed as actual values	Available in the Metrics section of the Talent Profile	Available on the Performance Card	Available on the Employee Details window
Review - Current Review Status	Talent Profile - Metrics section	Yes	Yes
Review - Last Focal Review Rating	Talent Profile - Metrics section	Yes	Yes
Employee - Review Rating	Talent Profile - Metrics section	No	No
Employee - Competency Rating	Talent Profile - Metrics section	No	No
Employee - Goal Rating	Talent Profile - Metrics section	No	No

Configuring Employee Metrics Permissions

Configuration > [Taleo Performance] Administration > [Employee Management] Metrics Configuration

1. Click Edit.
2. In the Display column, select the checkbox for the metrics you want users to see.
3. In the Edit column, select the checkbox beside the metrics you want users to be able to modify in the Talent Profile.

   Not all metrics can be made editable.

Selected metrics are displayed in a user's talent profile.

Employee Metrics Permissions Fields

All of these fields can be enabled and disabled for your system as required, but only the employee metrics (in the Employee section) can be edited in the Talent Profile, as indicated in the table. The * indicates the metrics are configurable and may not have the default values.

Metrics Available	Available in the Metrics section of the Talent Profile	Available on Performance Card	Available on Employee Details	Can be set to be editable (in the Talent Profile only)	Always available in matrices	Always available in charts, for analysis and calibration
Position - Critical	Yes	Yes	Yes	No	No	Yes

Metrics Available	Available in the Metrics section of the Talent Profile	Available on Performance Card	Available on Employee Details	Can be set to be editable (in the Talent Profile only)	Always available in matrices	Always available in charts, for analysis and calibration
Succession - Number of Successors	Yes	No	Yes	No	No	No
Succession - Interim Replacement	Yes	Yes	Yes	No	No	No
Succession - Replacement Name	Yes	Yes	Yes	No	No	No
Succession - Bench Strength	Yes	Yes	Yes	No	No	No
Succession - Number of Succession Plans	Yes	No	No	No	No	No
Career - Number of Career Scenarios	Yes	Yes	Yes	No	No	No
Career - Job Role in Career Plan	No. This metric was added for calibration purposes.	No. This metric was added for calibration purposes.	No. This metric was added for calibration purposes.	No	No	No
Goal - Status	Yes	Yes	Yes	No	No	No
Goal - Average Progress	Yes	Yes	Yes	No	No	Yes
Goal - Last Update	Yes	Yes	Yes	No	No	No
Review - Current Review Status	Yes	Yes	Yes	No	No	No
Review - Last Focal Review Rating	Yes	Yes	Yes	No	No	No
Review - Current Review Rating	No. This metric was added for review calibration purposes.	No. This metric was added for review calibration purposes.	No. This metric was added for review calibration purposes.	Not applicable.	No	Yes
Review - Current Review Section Rating	No. This metric was added for review calibration purposes.	No. This metric was added for review calibration purposes.	No. This metric was added for review calibration purposes.	Not applicable.	No	Yes
Employee - Review Rating	Yes	No	No	Yes	Yes	Yes
Employee - Competency Rating	Yes	No	No	Yes	Yes	Yes
Employee - Goal Rating	Yes	No	No	Yes	Yes	Yes

Metrics Available	Available in the Metrics section of the Talent Profile	Available on Performance Card	Available on Employee Details	Can be set to be editable (in the Talent Profile only)	Always available in matrices	Always available in charts, for analysis and calibration
Employee - Potential*	Yes	Yes	Yes	Yes	Yes	Yes
Employee - Risk of Loss*	Yes	Yes	Yes	Yes	Yes	Yes
Employee - Impact of Loss*	Yes	Yes	Yes	Yes	No	No
Employee - Reassignment Candidate*	Yes	No	No	Yes	No	No
Employee - Promotability Readiness*	Yes	No	No	Yes	Yes	Yes
Employee - Gap Analysis Score	Yes	No	No	No	No	No
Employee - Years in Industry	Not applicable. This information always shows in the Job Preferences section.	Not applicable.	Not applicable.	Not applicable.	Yes	Yes
Employee - Years in Management	Not applicable. This information always shows in the Job Preferences section.	Not applicable.	Not applicable.	Not applicable.	Yes	Yes
Development - Number of Activities	Yes	Yes	Yes	No	No	No
Development - Development Overall Progress	Yes	Yes	Yes	No	No	Yes
Development - Has Development Plan	Yes	No	No	No	No	No
Compensation - Current Salary	Yes	Yes	Yes	No	No	No
Compensation - Salary Increase	Yes	Yes	Yes	No	No	No
Compensation - Target Bonus	Yes	Yes	Yes	No	No	No
Compensation - Non-vested Stock	Yes	Yes	Yes	No	No	No

Importing Employee Metrics via TCC

You can use Taleo Connect Client (TCC) to import some employee metrics, which can then be viewed in the Talent Profile.

In TCC you can complete an import (both update and merge) of the following *EmployeeMetrics* fields: *LastReviewScore*, *EmployeePotential*, and *EmployeeRiskOfLoss*.

Only these metrics can currently be imported via TCC.

Example TCC file structure for updating employee metrics:

```
<?xml version="1.0" encoding="UTF-8"?>
<load:load productCode="SO1006" model="http://www.taleo.com/ws/so800/2009/01" root="Employee"
 operation="update" locale="en" header="true" delimiter="," quote="&quot;" xmlns:load="http://www.taleo.com/
ws/integration/load">
 <load:columns>
 <load:column parameter="1" type="DATA" path="TalentUser,ArUser,EmployeeID" searchType="SEARCH"
 searchTarget="../.." localeType="NONE"/>
 <load:column parameter="1" type="DATA" path="EmployeeMetrics,LastReviewScore" ignoreEmpty="true"
 localeType="NONE"/>
 <load:column parameter="1" type="DATA" path="EmployeeMetrics,EmployeePotential,Code" searchType="SEARCH"
 searchTarget="." ignoreEmpty="true" localeType="NONE"/>
 <load:column parameter="1" type="DATA" path="EmployeeMetrics,EmployeeRiskOfLoss,Code" searchType="SEARCH"
 searchTarget="." ignoreEmpty="true" localeType="NONE"/>
 </load:columns>
 <load:processingInstructions/>
</load:load>
```

Customizable Employee Metrics

The *Potential*, *Promotability Readiness*, *Reassignment Candidate*, *Risk of Loss*, and *Impact of Loss* employee metrics can be configured to use customized values, enabling them to better represent your HR processes and terminology.

The customizable employee metrics are available in the Talent Profile and Talent Snapshot, and in matrices and charts used with Performance Reviews, Succession Plans, and Talent Pools. They are also displayed when you use filters in the Review Calibrations, Talent Pools, Nomination Slates, and Talent Browser. Only *Potential* and *Risk of Loss* are available with facets in People Search. The delivered Taleo values are used with these customizable metrics, until you choose to change them. Your customized values can use any alphanumeric characters in their Code and Name.

Renaming a Customizable Metric Value versus Adding, Removing, Activating and Deactivating.

When only the name of an existing metric value is changed in the configuration, that change is immediately reflected in Performance screens. If customized metric values are added, removed, activated, or deactivated, the changes will only impact metric values used in existing employee records when those values are subsequently changed. This is because the configuration of the customized values are associated with the metrics themselves, and those values applied to employee records are stored in separate tables in the system.

For example, when Julia Savard's *Potential* metric was initially set to *High*, the available delivered values were *High*, *Medium*, *Low*. Later, those values were deactivated and the new custom values *Good*, *Average* and *Poor* were created and activated. Since the value associated with Julia is *High*, her manager would need to edit her metrics in the Talent

Profile and select *Good* from the drop-down list. This would ensure the most up to date customized value is associated with Julia's *Potential* metric. If only the names of the original values were changed, her manager would not need to update the employee records.

Customizable Metrics Use with Matrices and Charts

Some customizable employee metrics are available for use in matrices and charts used with Performance Reviews, Succession Plans, and Talent Pools.

When using customized metrics values with matrices and charts, only those metric values that are active can be used. If an employee in a chart or matrix cell is associated with a legacy value that is no longer active, the employee can remain there and the legacy value is displayed. Other employees cannot be moved into a cell with the inactive legacy value. If all of the custom values used in a chart or matrix have been replaced, the entire matrix may no longer be usable.

There are additional specific behaviors to be aware of when working with matrices that have customizable metrics values for dimension types:

- One metric value must map to one division/cell (use only one-to-one mappings) when setting up matrix and chart cells.
- As matrices can have custom labels, it is possible the labels and cell values do not match.

To prevent these issues from occurring, you should ensure in the Configuration that only properly formatted matrices and charts with active custom metric values are used with the Performance Review Template, Default Succession Plan Template, and Talent Pool Template. When changes are made to customizable metrics, they do not automatically get applied to matrices and charts.

Migrating Promotability Readiness for Use in Matrices and Charts

In Performance Management Feature Pack 12C the Promotability Readiness metric is delivered with these values: Ready Now, Ready in under 1 year, Ready in 1-2 years, Ready in 2+ years. If you are currently using the Promotability Readiness metric in a prior release with different metric values than these, are upgrading to release 12C, and want to continue using your prior metric values in matrices and charts, then you will need to map to the previous values used in 12B with the Taleo Connect Client (TCC).

For example, consider the case of a matrix called All Metrics - Potential and Promotability, where the values for Promotability Readiness are as follows:

Division Name	Label	12B Value	12C Delivered Value
Division 1	Low	Above 30 months	Ready in 2+ years
Division 2	Medium	15-30 months	Ready in 2+ years
Division 3	High	0.0 to 15 months	Ready in 1-2 years

While updating, the system uses the later number in the 12B values to select and replace the corresponding configurable metric value delivered with 12C. In this case the delivered metric value **Ready in 2+ years** is used for both the previous Low and Medium values. As a result, employee records previously using the values **15-30 months** and **Above 30 months** will all display in the UI as **Ready in 2+ years.** The matrix will generate error messages because the values have to map on a one-to-one basis. If you want to return back to using your prior metric values the administrator will need to migrate them back using TCC.

Maximum Number of Divisions for Customizable Metrics Used in Matrices and Charts

The maximum number of divisions for customized metrics for use in matrices and charts is as follows:

Customizable Metric Name	Matrix	Chart
Potential	5	5
Promotability Readiness	5	5
Risk of Loss	5	5
Impact of Loss	0	0

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.

Customizable Metrics Use in the Talent Snapshot

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

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

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

Customizable Metrics Use in Filters

Employees can be filtered based on customizable metrics in the following contexts:

- Review Calibrations
- Talent Pool
- Talent Browser
- Nomination Slate

Customizable Metrics Use in Searches

Only the *Potential* and *Risk of Loss* customizable metrics are available with facets in People Search.

When metric values are made inactive they are not searchable. Only active values show up in facets.

Customizable Metrics Use in Calibration

Customizable metrics can be calibrated from the following contexts:

- Talent Pool, Matrix mode
- Talent Pool, Chart mode
- Performance Reviews Hub, Matrix mode
- Performance Reviews Hub, Chart mode
- Succession Plan, Matrix mode

Features Removed

The following predefined searches are removed from succession plans: Search for Top Employees, Search for Above Average Fit Employees, and Search for Fit Employees.

On the Talent Pool pages, the **Update Metrics** option is removed from the **More Actions** dropdown list, and now displays directly on the toolbar on its own, where applicable. In some instances the **More Actions** dropdown list is removed from the toolbar.

On the Talent Browser, the Metrics section is removed from the Team Summary page.

Configuration

The following configuration setting is used for customizing the values of the employee metrics *Potential*, *Promotability Readiness*, *Reassignment Candidate*, *Risk of Loss*, and *Impact of Loss*.

Note: Impact of Loss is a new metric as of Feature Pack 12C.

User Type Permission	
Name	**Location**
Configurable Metrics	**Configuration > [SmartOrg] Administration > [Users] Configurable Metrics [Metric Management]**

Delivered Values for Customizable Metrics

The delivered values for the customizable metrics are as follows:

- **Potential:** Low, Medium, High, Not Specified.
- **Promotability Readiness:** Ready Now, Ready in under 1 year, Ready in 1-2 years, Ready in 2+ years.
- **Reassignment Candidate:** Yes, No.
- **Risk of Loss:** Low, Medium, High, Not Specified.
- **Impact of Loss:** Low, Medium, High.

Not Specified is only delivered as a metric value for **Potential** and **Risk of Loss.** If you want Not Specified as a value in the other customizable metrics for your implementation, your system administrator must define it in Configuration.

- Even though not delivered in Configuration, and not initially selectable from dropdown lists, the Not Specified value will appear in certain employee records at first for Impact of Loss, Reassignment Candidate and Promotability Readiness. This will occur in records where there are no migrated values to fill the field. The database will populate such records with Not Specified rather than using a null value.
- To add Not Specified as a valid value on the dropdown lists your system administrator must add it in Configuration.
- To change an employee record from Not Specified to some other value, the value must first be configured and available to display on the dropdown lists.

The best practice at startup or beginning migration is to make sure each customizable metric has the full set of values you want to use, and that one of the values for each metric is set as the default.

Customizable Metrics Configuration Considerations

- When configuring employee metric values you can create new values or edit existing ones. Editable properties for metric values include reordering the location they display on dropdown lists; editing the names, codes and icons; activating or deactivating the custom values; and setting a default value.
- When creating a metric value, you may give it an alphanumeric name and represent it with an icon. You can also edit the name and icon for existing metrics. The image can be a maximum of 16 x 16 pixels, must be in .gif, .jpeg or .png format, and have a transparent background.
- You can activate a custom metric value for use in the system, and deactivate any delivered or custom values you no longer want to use. Deactivated (inactive) values will still be displayed for any employee, matrix, or chart that is using the custom metric, but they will not be available for selection from dropdown lists for any new employee records, matrices or charts.

To Customize Metric Values

Configuration > **[SmartOrg] Administration** > **[Users] Configurable Metrics** > **[Metrics Management]**

1. Click on the Code label of the employee metric whose values you want to customize.

The Metric Type screen opens providing you the options to Create, Edit, Activate/Deactivate and Reorder the values for the selected metric.

2. To reorder the sequence in which the metric values display in dropdown lists in the application; click **Reorder** in the **Configurable Metrics** section.
   a. Highlight an existing metric value name and use the arrows to change its order in the list.
   b. Then click **Save**.
3. To create a new metric value; click **Create** in the **Configurable Metrics** section.
   a. Enter an alphanumeric Code and Name.
   b. Select Default Value if you want this to be a default setting.
   c. Click Browse if you want the metric value to be represented by an icon, and navigate to select the image file off a local machine. Then select **Change Picture**.

      The image can be a maximum of 16 x 16 pixels, must be in .gif, .jpeg or .png format, and have a transparent background.
   d. Click Save.
4. To edit an existing metric value; click **Edit** in the **Actions** section.
   a. Edit the alphanumeric Code or Name.
   b. Select Default Value if you want this to be a default setting.
   c. Click Browse if you want to change the icon used to represent the metric value, and navigate to select the image file off a local machine. Then select **Change Picture**.

      The image can be a maximum of 16 x 16 pixels and must be in .gif, .jpeg or .png format, and have a transparent background.
   d. Click Remove if you want to remove the icon used to represent the metric value.
   e. Click Save.
5. To activate or deactivate the existing metric value; click the appropriate button in the **Actions** section.
   a. Click Save.

- The customized values are now available to be used with the employee metric.
- For any custom values you deactivated, the old values will still be displayed for any employee record, matrix, or chart that is using the custom metric, but they will not be available for any new employee records, matrices or charts.
- If any changes need to be made to an employee's records containing existing custom metrics, the deactivated values will not be available for selection.
- When custom values are changed in the Configuration module, the history of those changes are tracked. The history includes the person who made the change, the customized metric values, and the context from where the value is changed.

- You can configure matrices and charts to use the customizable metrics as dimension types. Only one-to-one mappings are allowed when setting up matrix and chart cells.

Talent Profile Configuration

The Talent Profile Management configuration allows system administrators to define what information is displayed and/or editable on an employee's talent profile. The configuration tools consolidate the settings for each section of the Talent Profile, allowing the administrator to configure the layout of the entire profile from a single location.

The overall properties and layout of the Talent Profile, and those of its component sections, are highly configurable. This allows you to match the information in the Talent Profile to your business needs. You can also create and configure new custom sections, subsections and user-defined fields; decide which fields to include in each section (including metrics); and neatly organize section order in the user interface.

The Talent Profile Management configuration section provides the following groups of configuration options:

- **Talent Profile Properties -** Manage global talent profile configuration properties.
- **Talent Profile Section Visibility Groups -** Manage talent profile section visibility and availability groups.
- **Talent Profile Layout -** Configure talent profile section order and layout, and apply visibility groups to control user access.

The Talent Profile Management configuration section is located at **Configuration** > **[Performance] Administration.**

Configuration

These settings are included in the Talent Profile configuration.

Setting	
Name	**Description**
Talent Profile Properties	Allows a system administrator to edit the following global properties of the Talent Profile: Maximum Number of Historical Reviews; Allow File Attachments; Allow Employees to Upload Photos; and two API keys for LinkedIn Integration.
Talent Profile Visibility Groups	Allows a system administrator to define employee visibility and availability groups, based on criteria such as organization or location or job role. These can be used to control access to Talent Profile sections for particular groups of employees.
Talent Profile Layout	Allows a system administrator to perform layout changes and customizations to all sections of the Talent Profile, from one location in Configuration. The page displays links providing quick access to supporting pages which group together all the functionality for configuring a particular Talent Profile section.

Configuring Talent Profile Properties

The Talent Profile Properties configuration section allows administrators to edit Talent Profile global properties.

These include:

- Maximum Number of Historical Reviews
- Allow File Attachments
- Allow Employee to Upload Photo
- LinkedIn Integration - API Key
- LinkedIn Integration - API Secret

Also see the *Employee Photo Upload section* for more details about this feature.

LinkedIn Integration Configuration

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.

Overview

The LinkedIn Integration feature uses LinkedIn's public interfaces (API's)to allow a LinkedIn user to access their LinkedIn profile information and transfer it to their Talent Profile.

Business Process Flow

The top-level business process flow for setting up and using the Talent Profile's LinkedIn integration feature is as follows:

1. Customer sends request form to LinkedIn for the two needed API keys.
2. Customer requests Taleo Support activate the Enable LinkedIn Integration setting for Performance.
3. Taleo Support turns on the Enable LinkedIn Integration configuration setting (Value=yes). This is a Protected setting.
4. Customer administrator configures Talent Profile Properties with two needed API keys provided by LinkedIn.
5. User accesses their Talent Profile and sees Import from LinkedIn button at header level for the Work Experience, Education and Certifications sections.
6. User clicks Import from LinkedIn button for a section (e.g. Work Experience).
7. User logs into LinkedIn; views a legal disclaimer; and uses Add dialog to review section profile information available from LinkedIn.
8. User selects profile information they want to import from LinkedIn to the Talent Profile section they are in, and clicks Add button to initiate the import.
9. LinkedIn information is transferred to the user's applicable Talent Profile section.

Talent Profile LinkedIn Integration Configuration

Configuring the Talent Profile LinkedIn integration involves the two following settings:

Setting		
Name	**Description**	**Location**
Enable LinkedIn Integration	• Is new in FP 13B • Enables users to retrieve profile data from the LinkedIn system and import into their Talent Profile. • Is a Protected setting. • Default value is No (Off).	Configuration > [Taleo Performance] Settings > [Product Settings] > [Refine By] Keyword=Linked > Enable LinkedIn Integration.
Talent Profile Properties	• Was introduced in FP 13A, then updated in FP 13B with new LinkedIn Integration section. • Enables administrators to configure the integration by entering the API keys from LinkedIn. • LinkedIn Integration section displays on this page only when the Enable LinkedIn Integration setting is enabled.	Configuration > [Taleo Performance] Administration > [Talent Profile Management] Talent Profile Properties

Talent Profile Properties Configuration Settings

Setting	Description
Maximum Number of Historical Reviews	Sets the maximum number of historical reviews that can display in the Performance Reviews section of the Talent Profile.
Allow File Attachments	Allows for file attachments in the Talent Profile.
Allow Employee to Upload Photo	Allows employees to upload a personal photo from the Talent Profile.
API Key (also named Consumer Key or Dev Key)	Enter key provided by LinkedIn. Used to access their API services. The LinkedIn Integration section displays only when the Enable LinkedIn Integration setting is configured to Yes.
API Secret	Enter key provided by LinkedIn. Used to sign their service requests. The LinkedIn Integration section displays only when the Enable LinkedIn Integration setting is configured to Yes.

Configuring the Talent Profile Properties

- The Enable LinkedIn Integration setting must be enabled by Support, if your organization wants to use LinkedIn Integration in the Talent Profile.
- User must have administrator access for this following task.

Configuration > **[Performance] Administration** > **[Talent Profile Management]** > **Talent Profile Properties**

1. Review current Talent Profile Global Properties.
2. Click Edit to change the properties settings.
3. Configure the settings as needed for Maximum Number of Historical Reviews, Allow File Attachments, and/or Allow Employee to Upload Photo.
4. If LinkedIn Integration is to be used, enter the two API keys provided by LinkedIn for access to their services.
5. Click Save.

The changes made in configuration will be reflected in the Talent Profile user interface.

Make any changes needed to the Talent Profile section layout using the Talent Profile Layout settings pages.

Configuring Talent Profile Visibility Groups

Visibility and availability groups are user-defined employee groups, based on such criteria as organization or job role, that can be used to control access to Talent Profile sections. This feature allows administrators to configure new or edit existing visibility and availability groups. Administrators can control visibility on each section of the Talent Profile, customize the profile by population, and take advantage of the user types, groups, OLF they have already configured.

Section Visibility and Availability

Visibility groups are user-defined employee groups, based on such criteria as organization or job role, that can be used to control access to Talent Profile sections. Administrators configure visibility groups, selectively apply them to Talent Profile sections, and as a result control the profile sections to be visible or available to those particular groups of employees. 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 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. There are several Talent Profile related user type functional domains:

- Employee Metrics: Access to employee metrics and user-defined employee metrics and access to 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.

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 does have role-based, field level visibility configuration.

Business Process Flow:

1. Administrators create visibility groups using the Talent Profile Visibility Groups pages.
2. Administrators apply visibility groups to sections as needed, using the Talent Profile Layout pages.
3. End-users view and/or edit only those Talent Profile sections their user type permissions and visibility group settings allow them to.

Talent Profile Visibility and Availability Groups Creation

Administrators use the Talent Profile Visibility Groups pages to create groups of employees whose access to Talent Profile sections should be controlled in a like manner. (Navigation: Configuration > [Taleo Performance] Administration > [Talent Profile Management] Talent Profile Section Visibility Groups.) History is tracked when visibility groups are created, modified or deleted.

Talent Profile Section Visibility Groups Page

Use this page to view read-only information about the section visibility groups, and follow links to create, duplicate or deactivate groups. The visibility groups can later be applied to configurable Talent Profile sections, other than General. User-interface (UI) elements on this page include the following:

UI Element	
Name	**Description**
Refine By	A list of existing visibility groups displays on the page. If the list is longer than the viewable area use Refine By to pare down the list or search for a particular group, by keyword or status.
Create	Use to open the Talent Profile Section Visibility Group Editor page.
[Group] Name	Use to open the Talent Profile Section Visibility Group - [Group Name] page, to configure the group.
Deactivate	Use to deactivate an existing visibility group, so its status is inactive.

UI Element	
Name	**Description**
Duplicate	Use to duplicate (make a copy of) an existing visibility group for the purpose of using the copy as a template for a new group.

Talent Profile Section Visibility Group Editor Page

Use this page when first creating a visibility group, or when modifying an existing group. UI elements on this page include the following:

UI Element	
Name	**Description**
Code	Use to enter a Code for the group.
Name	Use to enter a Name for the group.
Status	Status will display as Draft until the group properties are entered and saved. Afterwards the status can register as Active or Inactive.
Description	Use to enter a Description for the group.
Save	Use to Save the new group to the database.
Cancel	Use to Cancel any unsaved changes.

Talent Profile Section Visibility Group - Group Name Page

Use this page to configure the selected visibility group. UI elements on this page include the following:

UI Element	
Name	**Description**
Properties	Displays the Code, Name, Status and Description of the visibility group.
Edit	Use to modify the properties.
[Categories]	Use the categories provided for defining the employee sets to be included in the visibility group: Organizations, Locations, Job Fields, Job Levels, user Groups and User Roles.
[Categories] User Groups	The User Groups values come from SmartOrg security, user type permissions configuration (e.g. Administration).
Add	Use to open the [Context] Selector page, where you can select from among the available valid values for the context (e.g. Location=France.)

The following is an example of how visibility and availability groups can be used to control access to a Talent Profile section.

The scenario:

- A custom "Bonus" section has been created for all the executive personnel, and only for them.
- You want to configure security so the executive personnel can view the new Bonus section in their own Talent Profile.
- And so their peers cannot see each other's Bonus section.
- And so HR administrators can view and edit the Bonus section of all executives.

The solution:

Step One - Create these 3 Visibility Groups:

1. Employee - based on User Role=Employee.
2. HR Admin - based on User Role=HR Administrator.
3. Executive Personnel - based on Job Level=VP and above.

Step Two - In the Talent Profile Layout - "Bonus" section configuration, set up these availability controls:

- This Section will apply to the following profiles (Availability)=Specific Groups Profiles.
- Group Name=Executive Personnel; Include=selected; Exclude=not selected.

Step Three - In the Talent Profile Layout 'Bonus' section configuration, set up these visibility controls:

- Allow the following groups to view and edit this section (Visibility) = Specific Groups.
- Group Name=HR Administrator; Include=Read and write; Exclude=not selected.
- Group Name=Employee; Include=Read and write; Exclude=not selected.

Note:

In order to block the peers from viewing each others' bonus, the proper security has to be set at Employee Profile security domain level. The section visibility configuration is inheriting the Employee Profile domain security.

Configuration

The following configuration settings control the creation and use of visibility and availability groups:

Setting		
Name	**Location**	**Description**
Talent Profile Visibility Groups	Configuration > [Taleo Performance] Administration > [Talent Profile Management]	Use to create and modify visibility and availability groups.
Talent Profile Layout	Configuration > [Taleo Performance] Administration > [Talent Profile Management]	Use to apply the visibility and availability groups to Talent Profile sections.

To Create a Visibility Group

Configuration > [Performance] Administration > [Talent Profile Management] Talent Profile Section Visibility Groups

1. Click Create.
2. On the Talent Profile Section Visibility Group Editor page, enter a Code, Name and Description for the group.
3. Click Save.

   The Talent Profile Section Visibility Group - [Group Name] page opens with the group identifying information displaying, and the status as Draft.
4. For each applicable group selection criteria (e.g. Organization, Location, Job Level) click Add, use the selection page to select the identifying criteria, and click the Select button.
5. Click Activate to save the changes and activate the group.

The new group is created and its status is Active.

Use the visibility group to configure access control to Talent Profile sections in the Talent Profile Layout pages.

To Edit a Visibility Group

Configuration > [Performance] Administration > [Talent Profile Management] Talent Profile Section Visibility Groups

1. On the Talent Profile Section Visibility Groups page, in the Section Visibility Groups grid, click the linked group name for the group you want to modify.
2. On the Talent Profile Section Visibility Group - [Group Name] page make any needed edits.
   - Optional. Next to Properties, click Edit to access the Talent Profile Section Visibility Group Editor page. Edit the Code, Name and Description for the group as needed. Click Save or Cancel to return to the Talent Profile Section Visibility Group - [Group Name] page.
   - Optional. Next to each of the needed selection criteria categories, click Add or Remove to modify the selection criteria.
   - Optional. At the top of the Talent Profile Section Visibility Group - [Group Name] page you can also select from the Duplicate, Activate and Delete actions.

The selected group is modified.

Use the visibility group to configure access control to Talent Profile sections in the Talent Profile Layout pages.

Configuring Talent Profile Layout

The Talent Profile Layout page allows administrators to perform layout changes and customizations to all sections of the Talent Profile, from one location in Configuration. The page displays links providing quick access to supporting pages which group together all the functionality for configuring a particular Talent Profile section.

The Talent Profile Layout page provides Details links to editor pages for the following profile sections:

- General
- Metrics
- Review History
- Compensation
- Competencies

- Employee Information
- Education
- Work Experience
- Certifications
- Job Preferences
- Attachments

The Talent Profile Layout configuration options include adding custom sections, reordering the appearance of sections in the Talent Profile, activating or deactivating sections, and viewing and editing the display details of fields in each section.

General Section

The administrator can use the Talent Profile Layout configuration settings to:

- Cannot deactivate section.
- Specify language availability and base language.
- Edit properties.
- Add fields of the following types: Employee Information UDF, Employee Metric, Employee Metric UDF and Standard. Fields may only be added below the gray line.
- Edit fields to turn on and off read only display. Cannot set to write.
- Configure single record fields, multi-record fields and user-defined fields (UDFs).
- Delete fields. Except Current Job, only those below gray line.
- Reorder fields. Only those below gray line.

Metrics Section

The administrator can use the Talent Profile Layout configuration settings to:

- Deactivate section.
- Set 50/50 Split option.
- Specify language availability and base language.
- Edit properties.
- Add fields of the following types: Employee Information UDF, Employee Metric, Employee Metric UDF and Standard. Fields may only be added below the gray line.
- Edit fields to turn on and off read only display. Cannot set to write.
- Configure single record fields, multi-record fields and user-defined fields (UDFs).
- Delete fields. Except Current Job, only those below gray line.
- Reorder fields. Only those below gray line.
- Add, edit, delete subsections.
- Configure section availability and visibility based on groups.

Review History Section

The administrator can use the Talent Profile Layout configuration settings to:

- Deactivate section.

- Specify language availability and base language.
- Edit properties.
- Edit fields to turn on and off read only display. Default setting for all fields is on. Cannot set to write.
- Configure section availability and visibility based on groups.

Compensation Section

The administrator can use the Talent Profile Layout configuration settings to:

- Deactivate section.
- Specify language availability and base language.
- Edit properties.
- Configure section availability and visibility based on groups.

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.

Competencies Section

The administrator can use the Talent Profile Layout configuration settings to:

- Deactivate section.
- Specify language availability and base language.
- Edit properties.
- Edit fields to turn on and off read/write display.
- Configure section availability based on groups, but not visibility.

- Specify whether or not competency section is displayed to role.
- Specify whether the user can add or remove competencies.

For more details see *Configuring Talent Profile Competencies*.

Employee Information Section

The administrator can use the Talent Profile Layout configuration settings to:

- Deactivate section.
- Specify language availability and base language.
- Edit properties.
- Set 50/50 Split option.
- Add fields of the following types: Employee Information UDF, Employee Metric, Employee Metric UDF and Standard. Fields may only be added below the gray line.
- Edit fields to turn on and off read and write display.
- Configure single record fields, multi-record fields and user-defined fields (UDFs).
- Delete fields.
- Reorder fields.
- Add, edit, delete subsections.
- Configure section availability and visibility based on groups.

Job Preferences Section

The administrator can use the Talent Profile Layout configuration settings to:

- Deactivate section.
- Specify language availability and base language.
- Edit properties.
- Set 50/50 Split option.
- Add fields of the following types: Employee Information UDF, Employee Metric, Employee Metric UDF and Standard. Fields may only be added below the gray line.
- Edit fields to turn on and off read and write display.
- Configure single record fields, multi-record fields and user-defined fields (UDFs).
- Delete fields.
- Reorder fields.
- Add, edit, delete subsections.
- Configure section availability and visibility based on groups.

Education Section

The administrator can use the Talent Profile Layout configuration settings to:

- Deactivate section.
- Specify language availability and base language.
- Edit properties.
- Edit fields to turn on and off read and write display.

- Configure section availability and visibility based on groups.

Work Experience Section

The administrator can use the Talent Profile Layout configuration settings to:

- Deactivate section.
- Specify language availability and base language.
- Edit properties.
- Edit fields to turn on and off read and write display.
- Configure section availability and visibility based on groups.

Certification Section

The administrator can use the Talent Profile Layout configuration settings to:

- Deactivate section.
- Specify language availability and base language.
- Edit properties.
- Edit fields to turn on and off read and write display.
- Configure section availability and visibility based on groups.

Attachments Section

The administrator can use the Talent Profile Layout configuration settings to:

- Deactivate section.
- Specify language availability and base language.
- Edit properties.
- Configure section availability and visibility based on groups.

Talent Profile Layout Settings

UI Element	Description	Applicable to...	Opens Page...
Add Custom Section	Allows you to modify the top-level properties of a talent profile section or create a new one.	Talent Profile Layout page group.	Talent Profile Section Editor.
Reorder Sections	Allows you to reorder the sequence Talent Profile sections will display in the user interface.	Talent Profile Layout page group	Reorder Talent Profile Sections.
Languages/Refresh	Allows you to set the display language to a Talent Profile section.	Talent Profile Layout page group	n/a
Refine By	Allows you to refine the list of Talent Profile sections that appears on the Talent Profile Layout page.	Talent Profile Layout page group	n/a
Show/Hide	Allows you to toggle on and off a view-only display of the current layout fields and settings for a Talent Profile section.	Talent Profile Layout page group	n/a
Details	Allows you to edit the display properties for a selected Talent Profile section.	Talent Profile Layout page group	Talent Profile Section - [Section Name]

UI Element	Description	Applicable to...	Opens Page...
Activate/Deactivate	Allows you to Activate or Deactivate a section in the Talent Profile.	Talent Profile Layout page group	n/a
Split 50/50	Allows you to turn on and off the Split 50/50 (two column) layout property for a selected Talent Profile section.	Talent Profile Layout page group	n/a

To Configure Talent Profile Section Layouts

User must have administrator access for this task.

Configuration > [Performance] Administration > [Talent Profile Management] Talent Profile Layout

1. Optional. To change the language used for display of the section in the profile, select a new language and click Refresh.
2. Talent Profile sections are listed in the order they would appear in the Talent Profile user interface.
3. Optional. To narrow (shorten) the list of Talent Profile sections on this page (to reduce scrolling for example), use the Refine By selector, choose an option and then click Refresh.

   This does not change the appearance of the sections in the Talent Profile.
4. You can edit the list of sections, and consequently the appearance of the sections on the Talent Profile by adding custom sections, reordering the sections, renaming them, editing their details, or activating/deactivating them.
   - Click Add Custom Section to create a custom section.
   - Click Reorder Sections to change the sequence in which sections display in the Talent Profile user interface.
   - Click Show or Hide to the right of a section name in the list to toggle a view-only display of the section's fields and properties.
   - Click Details for a section in the list to edit its top-level properties, such as rename it.
   - Click Activate/Deactivate to the right of a section name in the list to display or remove it from the Talent Profile page.

     > **Note:** The General section of the Talent Profile cannot be deactivated.

   - Select Split 50/50 to utilize a split layout for the section.
5. Save your changes.

The selected sections of the Talent Profile are configured to meet the requirements of your organization, and the results are displayed in the profile.

Configuring Talent Profile Section Visibility

Visibility and availability groups are user-defined employee groups, based on such criteria as organization or job role, that can be used to control access to Talent Profile sections.

Talent Profile Section Configuration Using Visibility and Availability Groups

Administrators use the Talent Profile Layout pages to view and apply visibility groups to Talent Profile sections, for the purpose of controlling which employees can see or edit the sections. (Navigation: Configuration > [Taleo Performance] Administration > [Talent Profile Management] Talent Profile Layout.)

Talent Profile Layout Page

Use this page to view information about section visibility and availability settings, and field level visibility and read/write settings. Also use it to obtain edit access for modifying the settings. You can hide or show the information. UI elements on this page relevant to visibility groups include the following:

UI Element	
Name	**Description**
[Sections List]	Use to view a list of the existing sections available for your organization's implementation of the Talent Profile.
[Sections List] Show / Hide	Use to Show (view) or Hide the configuration properties for a list of the existing field level display properties, as well as any applicable visibility and availability settings, for a section.
[Sections List] Details	Use to access the Talent Profile - [Name] page for a particular section, where you can configure field level display properties, as well as any applicable visibility and availability settings, for the section.

Talent Profile Section - [Name].

Use this page to configure field level display properties, as well as any applicable visibility and availability settings, for a selected Talent Profile section. History is tracked when adding or removing visibility groups in a section. UI elements on this page relevant to visibility groups include the following:

UI Element	
Name	**Description**
[This section will apply to the following profiles:]	This setting controls section availability (i.e. whether or not a section is available to a group of employees.) • If it is available, it still might be configured to be either visible or not visible to the group. • If it is not available to a group it cannot be visible to the group at all. • This setting is controlled by two radio buttons: All Employee Profiles and Specific Groups Profiles. • This set of availability configuration fields will appear on all section configuration pages except for the General section.
[Allow the following group(s) to view and edit this section:]	This setting controls section visibility (i.e. whether or not a section is visible to a group of employees.) • To be visible to a group the section must first be available to the group. • This setting is controlled by two radio buttons: All Employee Profiles and Specific Groups Profiles. • This set of availability configuration fields will appear on all section configuration pages except for the General and Competencies sections.
All Employees Profiles	This is the default configuration setting for availability of a section. When selected it means all employees will have this Talent Profile

UI Element	
Name	**Description**
	setting available to them; subject to other visibility group and user type permission settings.
Specific Groups Profiles	Use this setting to make a Talent Profile section available to only specific groups, subject to other visibility group and user type permission settings. When this option is selected the Include and Exclude Groups links activate. Depending on your business needs you can use either of both to further filter your groups of employees.
Include / Exclude Groups links	Use to display a list of all visibility and availability groups you have defined (except the security user groups). You can choose which groups to further specifically include or exclude. • When you specify a group has Include Groups permission, it means the employees in the group have read/write permissions to the Talent Profile section. • When you specify a group has Exclude Groups permission, it means the employees in the group have neither read nor write permissions to the Talent Profile section. • You can also use Edit for Include Groups, to remove the write permission for the group. You can't do this for Exclude Groups since they are already excluded from read/write.

Here is an example of how visibility and availability groups can be used to control access to a Talent Profile section.

The scenario:

- A custom "Bonus" section has been created for all the executive personnel, and only for them.
- You want to configure security so the executive personnel can view the new Bonus section in their own Talent Profile.
- And so their peers cannot see each other's Bonus section.
- And so HR administrators can view and edit the Bonus section of all executives.

The solution:

Step One - Create these 3 Visibility Groups:

1. Employee - based on User Role=Employee.
2. HR Admin - based on User Role=HR Administrator.
3. Executive Personnel - based on Job Level=VP and above.

Step Two - In the Talent Profile Layout - "Bonus" section configuration, set up these availability controls:

- This Section will be on=Specific Groups Profiles.
- Group Name=Executive Personnel; Include=selected; Exclude=not selected.

Step Three - In the Talent Profile Layout 'Bonus' section configuration, set up these visibility controls:

- This section will be viewable and editable by=Specific Groups.
- Group Name=HR Administrator; Include=Read and write; Exclude=not selected.
- Group Name=Employee; Include=Read and write; Exclude=not selected.

Note:

In order to block the peers from viewing each others' bonus, the proper security has to be set at Employee Profile security domain level. The section visibility configuration is inheriting the Employee Profile domain security.

To Configure Talent Profile Section Visibility

The Visibility Groups you want to work with are already created.

Configuration > [Performance] Administration > [Talent Profile Management] Talent Profile Layout

1. On the Talent Profile Layout page, click Details next to the Talent Profile section name you want to set visibility and availability rules for.
2. On the Talent Profile Section - [Section Name] page, choose an option for "This section will be on".

   This setting controls section availability (i.e. whether or not a section is available to a group of employees.) If it is available, it still might be configured to be either visible or not visible to the group. If it is not available to a group it cannot be visible to the group at all. This setting is controlled by two radio buttons:
   - All Employee Profiles - this section is available to all employees.
   - Specific Groups Profiles - this section is available to specific visibility groups.

   This set of availability configuration fields will appear on all section configuration pages except for the General section.
3. On the Talent Profile Section - [Section Name] page, choose an option for "This section will be viewable and editable by".

   This setting controls section visibility (i.e. whether or not a section is visible to a group of employees.) If it is visible, it still might be configured to be either visible or not visible to the group. If it is not available to a group it cannot be visible to the group at all. This setting is controlled by two radio buttons:
   - All Employees based on Profile Permissions - this section is available to all employees.
   - Specific Groups - this section is available to specific visibility groups.

   This set of availability configuration fields will appear on all section configuration pages except for the General section.

   When the Specific Groups option is selected, the Include and Exclude Groups links activate. You can choose which groups to further specifically include or exclude.
   - When you specify a group has Include Groups permission, it means the employees in the group have read/write permissions to the Talent Profile section.
   - When you specify a group has Exclude Groups permission, it means the employees in the group have neither read nor write permissions to the Talent Profile section.
   - You can also use Edit for Include Groups, to remove either read or write permission for the group. You can't do this for Exclude Groups since they are already excluded from read/write..

Availability and visibility rules for the selected group(s) are set for the selected Talent Profile Section(s).

Configuring Talent Profile General Section

Beginning with Feature Pack 13B the Talent Profile's General section is now partially configurable, you can now customize six of the fields that appear in the General section. The following describes the details of the General section configuration.

General Section

The Talent Profile's General section is a partially configurable section, similar to the profile's several other composite sections. The General section is unique in that it is divided into two regions by a horizontal, thin gray line. The region above the line contains elements which are not configurable (i.e. Employee Name, and Current Job). Icons are no longer displayed in the upper, non-configurable region of the General section. Only text labels are used. The region below the line contains elements which are configurable. None of the fields in the General section are editable by the user.

General Section Configuration

Use the Talent Profile Section--General page to configure the lower region of the General section:

- The two regions combined may have a maximum of up to 7 fields.
- 1 field, Current Job, displays above the gray line, cannot be removed, and can be hidden if desired.
- The remaining up to 6 fields appear below the gray line and are display only. They do not support editing.
- The 6 fields may be removed, or added from a list of Standard fields (single-value) and Metric fields, or UDF fields (non-text, single value).
- One of the standard field options combines Work Phone and Extension into a single field.
- The Add Fields link is only available when there are less than 7 fields on the section. When the section has 7 fields the link display changes to Edit Fields.
- You may reorder fields in the lower region of the General section.
- The configurable region is always 50/50 split into two columns. This is not a configurable attribute.
- Section level visibility and availability configuration is not provided. Field level visibility configuration is not provided. The General section is available and visible for all employees.
- Add Sub Section is not supported.
- The section cannot be deactivated.

Reorder Talent Profile Section Page

Use this page to reorder the up to 6 fields appearing in the configurable region of the General section. the Current Job field does not show up in the reorder screen because its position is fixed.

Field Selector Page

Use this page to select and add up to 6 fields to appear in the configurable region of the General section. The system gives an error message when you try to add more than 7 fields to the General section. The fields allowed in the General section are:

Field Type	Fields / Comment
Standard	Single value fields only • Current Job (always in the section, cannot be removed, can be hidden) • Email Address • Ext. • Interest in International Assignment • Location • Manager

Field Type	Fields / Comment
	• Organization • Willing to Relocate • Work Phone Number • Work Phone Number and Extension • Years in Industry • Years in Management
Metric	All
User Defined	Non-text, single value fields only

Work Phone Number and Extension Field

The Work Phone Number and Extension field combines the content of the two fields: Work Phone Number, and Extension (e.g. "877.394.5644 Ext: 7856"). It can be used to display the content of both on the same line. This field is also available to the other composite sections of the Talent Profile. The recommended configuration path for migrating existing customers is as follows:

Existing Configuration Prior to Feature Pack 13B	Recommended Configuration Feature Pack 13B
"Work Phone Number "=Visible and "Ext." = Visible	"Work Phone Number and Extension"=Visible
"Work Phone Number "=Visible and "Ext."=Not Visible	"Work Phone Number "=Visible and "Ext."=Not Visible
"Work Phone Number "=Not Visible and "Ext." = Visible	"Work Phone Number "=Not Visible and "Ext." = Visible
"Work Phone Number "=Not Visible and "Ext."=Not Visible	"Work Phone Number "=Not Visible and "Ext."=Not Visible

Configuration

Talent Profile configuration options for these enhancements are available in the following location in the system:

Configuration Settings	
Name	**Location**
General section configuration pages.	Configuration > [Taleo Performance] Administration > [Talent Profile Management] Talent Profile Layout.

Adding Custom Sections

To add and configure properties for custom sections in the Talent Profile, from the Talent Profile Layout page click the Add Custom Section link. This opens the Talent Profile Section Editor page.

Use the Talent Profile Section Editor to create a custom section and edit its properties: Name, Code, active and base languages, Split 50/50 and Profile Field Label Placement.

Administrators can determine how the field names and field values in custom sections and sub-sections display on the Talent Profile. There are 3 configuration options:

- Default: The field labels and their values display as they always have prior to 15B.
- Above: The field labels display above the field values.
- Inline: The field labels display next to, or on the same line as the field values.

Add Custom Sections Settings

UI Element	Description	Applicable to	Header
Language	The selector displays any active languages for the section, including the base language.	Talent Profile Layout	Talent Profile Section Editor
Configure	Follow the Configure link to define the section's active and base languages.	Talent Profile Layout	Language Configuration page.
Code	Give the custom section a code (e.g. CUSTOM_PERF_SECT).	Talent Profile Layout	Talent Profile Section Editor
Name	Give the custom section a name (e.g. Custom Performance).	Talent Profile Layout	Talent Profile Section Editor
Split 50/50	Use the Split 50/50 option to allow fields to be displayed in 50/50 layout within a section or subsection. **Note:** 50/50 split is allowed for single record sections only, such as: General, Metrics, Job Preferences, or custom sections. It is not allowed for multiple record sections.	Talent Profile Layout	Talent Profile Section Editor
Profile Field Label Placement	Determines how the field names and field values in custom sections and sub-sections display on the Talent Profile.	Talent Profile Layout	Talent Profile Section Editor

To Add a Custom Section

User must be an administrator to perform this task.

Configuration > **[Performance] Administration** > **[Talent Profile Management]** > **Talent Profile Layout** > **Add Custom Sections** > **Talent Profile Section Editor**

1. Optional. The Language selector displays the current base language. Click the Configure link to open the Language Configuration page. Edit the base and active language as needed.
2. Create a custom section by giving it a Code and Name.

3. Optional. Select Split 50/50 if you want to use that display mode for fields in the section.
4. Save your changes.

The properties for the custom section are defined.

Use the Talent Profile Layout page's features to edit other properties for the section.

Reordering Sections

From the Reorder Talent Profile Sections page you can view and edit the order in which sections appear to users of the Talent Profile.

Reorder Sections Settings

UI Element	Description	Applicable to	Header
Talent Profile Sections	This text view area lists the activated Talent Profile Sections in the order they are currently set to appear on the Talent Profile user interface. Click on a section name to select and highlight it.	Talent Profile Layout.	Reorder Talent Profile Sections.
Up and down arrows.	Use the up and down arrows to move a selected section in the list, reordering the section display sequence as a result.	Talent Profile Layout.	Reorder Talent Profile Sections.

To Reorder Sections

User must be an administrator to perform this task.

Configuration > **[Performance] Administration** > **[Talent Profile Management]** > **Talent Profile Layout** > **Reorder Sections** > **Reorder Talent Profile Sections**

1. The page displays the names of all activated sections, in the order of their display sequence, in the Talent Profile Sections text view area.
2. Click on a section name in the list to select and highlight it.
3. Use the up and down arrows to move the section name to its new location in the list.
4. Save your changes.

The display sequence for the sections of the Talent Profile is changed in Configuration and in the Talent Profile user interface.

Viewing and Editing Talent Profile Section Details

Talent Profile section names are listed directly on the Talent Profile Layout page. Generally each section name has a Show/Hide link and a Details button located to the right. An administrator can view a section's layout detail settings using the Show/Hide. They can edit the layout details for a section by using the Details button. The Details button opens the Talent Profile Section - Section Name page, where detailed editing of the section fields and properties can be done.

Viewing Talent Profile Section Details

For information on viewing a Talent Profile section's layout details directly on the Talent Profile Layout page, see *To View Section Layout Detail Settings*.

Editing Talent Profile Section Details

On the Talent Profile Layout page, when you click on a section's Details button, the Talent Profile - [Section Name] page opens. It provides editing and customization capability for the fields and properties of the section. You can modify each section in different ways:

- Deactivate the section.
- Define the active languages and base language.
- Change the section name.
- Add a subsection.
- Add fields from a field selector: Standard fields, Employee Metrics, Employee Metrics UDFs, Employee UDFs.
- Delete fields.
- Define whether fields are displayed or editable.
- Reorder fields within the section.
- Reorder subsection will take all fields within that subsection with it.
- Save changes to layout.
- View History of changes to sections.
- For UDF fields define the UI types, UI components and number of lines.

Note: The same field cannot be selected twice in a section.

Upon saving your edits, the section and field displayed in the user interface reflects the new settings entered in the configuration. If no fields are configured as displayable for a given section, the section does not display in the Talent Profile.

To View Section Layout Detail Settings

User must be an administrator to perform this task.

Configuration > **[Performance] Administration** > **[Talent Profile Management]** > **Talent Profile Layout**

1. A list of Talent Profile sections displays on the page.
2. For a desired section, click the Show/Hide link to the right of the section name to toggle a view-only display of the section's fields and their properties.

This is a view-only display and is not editable.

To make edits to the properties for a given section, click the Details link to the right of the section name.

To Edit Talent Profile Section Details

Configuration > **[Performance] Administration** > **[Talent Profile Management] Talent Profile Layout**

1. A list of the Talent Profile sections is displayed on the page. Click the Details button to the right of the name of a section you want to edit.

   The Talent Profile Section - [Section Name] page opens, displaying the page title, relevant fields and properties for the selected section. For example, for the Employee Information section configuration the page name is **Talent Profile Section - Employee Information.**

2. Make any desired edits to the section.
    - Use Deactivate to the right of the page name to deactivate the section from the Talent Profile display.
    - Use Deactivate and Configure to the right of Language to edit the active and base languages.
    - Use Edit to the right of Properties to edit the properties of the section: Code, Name and Split 50/50.
    - Use Add Fields to include new fields to the section layout.
    - Use Add Sub Section to include a new sub section to the section layout.
    - Use Edit Fields to edit the properties for the existing fields in the section.
    - Use Reorder Fields to edit the display order of the fields in the section.
    - Use Delete to remove a field from the section.
3. Save your changes.

- The edited and saved changes are displayed in the Talent Profile user interface.
- If no fields in a section have been selected, that section is not displayed in the Talent Profile.

Talent Profile Section Configuration Fields

Standard and Employee Metric type fields configurable for display in Taleo 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 interface element (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. Some fields have different names in the talent profile display and are indicated as such.

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.

Name	Description
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.
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.

Name	Description
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.
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.

Name	Description
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.
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.

Name	Description
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.
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.

Name	Description
Status	Overall status of the employee's current goals.
Still in Position	Flag that indicates that the employee in 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.
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.

Talent Profile Custom Section Fields

Selectors for adding custom fields to sections allow the selection of "single record" fields only, not multi-record fields. Selectable fields during section configuration are available for the following types:

- Standard fields
- Metric fields
- UDF fields

The available fields for each type are as follows:

Type	Fields
Standard	• Current Job • Education Level • Email address • Employee Status • Job Level • Job Type • Interest in International Assignment • Preferred Job • Preferred Location • Preferred Organization • Location • Manager • Organization • Schedule • Willing to Relocate • Willing to Travel • Work Phone Number • Work Phone Extension • Years in Industry • Years in Management
Metric	• All the existing fields in the Metrics • All the fields defined through the employee Metrics UDFs
UDF	All the fields defined through the employee UDFs

Talent Profile Competency Configuration

Users can view, add, remove and rate competencies for themselves and for other employees directly in the Talent Profile user interface, depending on how the system is configured in Talent Profile Layout.

User Type Security

The ability to access and edit employee talent profile competencies can be configured separately for seven different user types:

1. Employee
2. Manager
3. High-level Manager
4. Matrix Manager
5. Mentor
6. HR Administrator

7. Other

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 who's talent profile they wish to view. It is important to note that the user types do not relate directly to the standard user types as defined in SmartOrg.

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 manger and the corresponding competency settings are applied.

Visibility Groups

The Competencies section of the Talent Profile has field level visibility, and section level availability configuration, but not section level visibility configuration. (Other sections except for Competencies and General have both section level visibility and availability).

Setting Talent Profile Competency Access

By default different settings are enabled for each user role.

Configuration > [Talent Performance] Administration > [Talent Profile Management] Talent Profile Layout > **Competencies** > **Details** > **Talent Profile Section - Competencies**

1. Click Edit beside the user role you want to configure.
2. Select the desired Displayed and/or Editable check boxes beside the relevant Competency Rating to set the read/write access.
3. Select User Can Add Competencies and/or User Can Remove competencies if the user requires the ability to change the competencies associated with an employee.
4. Select Display Competency Section in Talent Profile if you want the section to be displayed for that user role.
5. Click Save when complete.

The competencies are displayed as configured for that specific user role.

Repeat the procedure to configure other user roles.

Talent Profile Competency Fields

These settings can be configured differently for each user roles.

Configuration > [Performance] Administration > [Talent Profile Management] Talent Profile Layout > Talent Profile Section - Competencies	
UI Element	**Description**
Competency Rating	This refers to the different ratings that can be displayed in the Talent Profile for each of competencies. • Proficiency • Experience • Interest • Last used • Performance Rating (Employee) • Performance Rating (Manager)

Configuration > [Performance] Administration > [Talent Profile Management] Talent Profile Layout > Talent Profile Section - Competencies	
UI Element	**Description**
Displayed	Indicates whether the user has read access to the rating.
Editable	Indicates whether the user has write access to the rating.
User Can Add Competencies	This setting provides the ability to add competencies from the Talent Profile.
User Can Remove Competencies	This setting provides the ability to remove competencies from the Talent Profile.
Display Competency Section in Talent Profile	This indicates whether the section is displayed in the Talent Profile.

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.
Display competency section in Talent Profile	This setting is required for the Competencies section to be displayed in the Talent Profile.

Configuring User-Defined Fields for the Talent Profile

Users-defined fields can be displayed in the Talent Profile.

If you want additional custom information, you can create employee user-defined fields and employee metrics user-defined fields. These can then be activated and included in the talent profile. When included on a talent profile you can decide in which order the fields should be displayed and whether they can be edited.

Creating a User-Defined Field

Creating a user-defined field allows an organization to create and define company specific information that can later be added to various contexts, according to the context for which it was created.

Configuration > [Performance] Administration > [Performance Reviews] User-defined Fields

Configuration > [Performance] Administration > [Goals Management] Employee Goal User-defined Fields

Configuration > [Performance] Administration > [Goals Management] Competency Goal User-defined Fields

Configuration > [Performance] Administration > [Employee Management] Employee Information User-Defined Fields

Configuration > [Performance] Administration > [Employee Management] Employee Metrics User-Defined Fields

1. In the User-Defined Field page of the selected context, click Create next to the User-Defined Fields header.
2. In the New User-Defined Field page, specify the properties of the new field.

   Note that once created and saved, only the name can be edited.

   Also, if more than one language has been configured, a name will be required for each language before saving is allowed.
3. Click Save.

The new field displays in the list of User-Defined Fields and is available for selection.

Once created, the user-defined field can be added to a review's custom section, to a goal plan or development plan template or to the Talent Profile form, depending on the type of field created.

Creating a User-Defined Selection List

Creating a user-defined selection list allows system administrators to create additional selection lists having a set of user-defined values (or elements.) The selection list may be later used to define a user-defined field. This functionality can be used in performance reviews, goals plans, development plans or in the employee management section of the Talent Profile.

Configuration > [Performance] Administration > [Global Configurations] User-defined Selections

Configuration > [Performance] Selection Lists

1. In the User-Defined Selections page, click Create next to Selections.
2. In the New User-Defined Selection page, specify the properties for the new selection.
3. Click Save.
4. In User-Defined Selection page, click Create next to Elements to define the elements of the list.
5. In the New Element page, specify the properties of the new element.
6. Repeat steps 4 and 5 for each element composing the selection list.

The new selection list name displays and is available for use in the list of domain fields when creating user-defined fields.

Once the properties are created, you must activate at least one value (element) to then activate the selection for the newly created selection list to be available as a user-defined field to be added in custom sections of performance reviews, goal plans, development plans and the employee management section of the Talent Profile.

Adding a User-Defined Field to the Talent Profile

Adding a user-defined field to a section of the Talent Profile allows system administrators to display additional information on the Talent Profile.

- For a field to be available for selection to add it to the Talent Profile, it needs to have been previously created and defined as an Employee Information User-Defined Field or as an Employee Metric User-Defined Field.
- User-Defined Fields can be added to Metrics, Employee Information, and Custom sections.

Configuration > **[Performance] Administration** > **Talent Profile Layout** > > **Details** > **Talent Profile Section - [Section Name]**

1. In the Content section click Add Fields to open the Field Selector.
2. In the Field Selector page, navigate to and select the checkbox for the fields that you wish to add to the Talent Profile.
3. Click Select to add the field(s) to the section and return to the previous Talent Profile Section - [Section Name] page.

The fields are automatically added to the Content list and therefore, will be displayed on the Talent Profile form when applicable.

Once added, the fields can be reordered and display properties set as needed.

Editing a Talent Profile User-Defined Field

Editing a Talent Profile user-defined field consists of configuring if the field will be editable and how the values of the field will be presented on the Talent Profile.

- For a field to be available for selection to add it to the Talent Profile, it needs to have been previously created and defined as an Employee Information User-Defined Field or as an Employee Metric User-Defined Field.
- User-Defined Fields can be edited in Metrics, Employee Information, and Custom sections.

Configuration > **[Performance] Administration** > **Talent Profile Layout** > > **Details** > **Talent Profile Section - [Section Name]**

1. In the Content section click Edit Fields to open the Talent Profile Section Field Editor.
2. In the Field Editor page, edit the UI Component or Display properties as needed.
3. Click Save. The application returns you to the previous Talent Profile Section - [Section Name] page.

The fields properties are updated, the fields remain displayed in the Content list, and will be displayed on the Talent Profile form with their new properties.

Removing a User-Defined Field from the Talent Profile

Removing a user-defined field from a Talent Profile is done from the Talent Profile Layout configuration.

- For a field to be available for selection to add it to the Talent Profile, it needs to have been previously created and defined as an Employee Information User-Defined Field or as an Employee Metric User-Defined Field.

- User-Defined Fields can be removed from Metrics, Employee Information, and Custom sections.

Configuration > [Performance] Administration > Talent Profile Layout > > Details > Talent Profile Section - [Section Name]

1. In the Content section click the Delete button on the right side of the row for the field you want to remove.
2. Click OK to the confirmation message.
3. The field is removed from the Content list.
4. Repeat as needed to delete all the fields you want remove from the list.

The fields are automatically removed from the Content list, and will not be displayed on the Talent Profile form.

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**
Allow Employee to Upload Photo	This is required to have the **Change Photo** 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**
[Users] User Accounts Select a User Type and Account Employee Information section Edit	An administrator can upload an employee photo from this setting.
[Users] User Types Functional Domain=Performance Employee Profile Edit Permissions=Manage	You can assign Manage access for different types of users, and this permission is required to see the **Change Photo** option and be able to upload a photo.

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.

Configuring Talent Search

Typically features are enabled with a product setting, but talent search and faceted search results are also configured via user permissions.

There are also search criteria settings which control which fields can be used when doing an advanced search and a setting for displaying the fit column in search results.

Configuring Talent Search

Access to the Configuration Module.

1. Enable the **Performance > Team Management** user type permission for search.

   Access centralized search - This permission provides access to the talent search box displayed at the top of each screen and advanced search. It also provides access to the central talent search page where results are displayed and advanced searches are run and modified.

2. Set the **Performance** user type permissions, which control who the person conducting the search can see when they use employee metric fields as search criteria.

   Employee Metrics > View - This permission enables search results to be limited to certain groups of employees, such as direct reports or those in the same group, when searches include employee metrics and user-defined employee metrics fields. The employee metrics are Potential, Promotability, Review Ratings, Reassignment Candidate, and Risk of Loss. This permission is also required to use Secure Facets.

3. Set **Performance > Succession Plan** and **Common > Pools** permissions to enable users to add people to those modules.
4. Set **Configuration > [Performance] Settings > Employee Job Role Advanced Search Field Configuration**, which adds the employee job role as criteria for advanced searches. By default it is set to *Yes*.
5. Select which search criteria will be available via the **Customize** option in **Advanced Search**.
6. Set the **Performance** rating settings, which are used for the Ratings facet, along with the Talent Profile metric Employee - Rating.

   Review Rating Metric Rating Model - Indicates the rating model used to determine the available values for the *Employee – Review Rating* metric.

   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.

7. Edit **Configuration > [Performance] Settings > Show the 'Fit' Column in Person Search Results**, to change the default behavior and to display the Fit column in search results.

   The search results will still be listed by fit percentage, even if the Fit column is not displayed.

Talent Search is available in your system for users and groups with the **Access centralized search** permission.

Talent Search Configuration Settings

The following settings control the criteria available via the Customize option in Advanced Search. They are also used for controlling which criteria can be used when running an advanced search in Talent Pools and Succession Plans. Note the **Enable Advanced Search** setting for Succession Plans and Talent Pools must be enabled to use advanced search with those modules.

Configuration > [Performance] Settings			
Setting Name	**Setting Description**	**Possible Values**	**Setting Category**
City Advanced Search Field Configuration	Indicates if the city field criterion is available in the advanced search.	• Yes • No (default)	**Person Search**
Competencies Advanced Search Field Configuration	Indicates if the "Competencies" section is available in the advanced search.	• Yes • No (default)	
Country Advanced Search Field Configuration	Indicates whether the country field criterion is available in the advanced search.	• Yes • No (default)	**Person Search**
Employee Job Field Advanced Search Field Configuration	Indicates if the "Employee Job Field" criterion is available in the advanced search.	• Yes • No (default)	**Person Search**

Configuration > [Performance] Settings			
Setting Name	**Setting Description**	**Possible Values**	**Setting Category**
Employee Job Role Advanced Search Field Configuration	Indicates if the "Employee Job Role" criterion is available in the advanced search.	• Yes (default) • No	**Person Search**
Employee Location Advanced Search Field Configuration	Indicates whether the employee location field criterion is available in the advanced search.	• Yes • No (default)	**Person Search**
Employee Metrics User-defined Fields in Advanced Search Field Configuration	Indicates if the section "Employee Metrics User-defined Fields" is available in the advanced search.	• Yes • No (default)	**Person Search**
Employee Manager Name Advanced Search Field Configuration	Indicates whether the employee manager name field criterion is available in the advanced search.	• Yes • No (default)	**Person Search**
Employee Organization Advanced Search Field Configuration	Indicates whether the employee organization field criterion is available in the advanced search.	• Yes • No (default)	**Person Search**
Employee Potential Advanced Search Field Configuration	Indicates if the "Potential" field is available in the advanced search. This field is restricted.	• Yes • No (default)	**Person Search**
Employee Readiness For Promotion Advanced Search Field Configuration	Indicates if the "Readiness" field is available in the advanced search. This field is restricted.	• Yes • No (default)	**Person Search**
Employee Review Rating Advanced Search Field Configuration	Indicates if the "Employee Review Rating" criterion is available in the advanced search.	• Yes • No (default)	**Person Search**
Employee Risk Of Loss Advanced Search Field Configuration	Indicates if the "Risk of Loss" field is available in the advanced search. This field is restricted.	• Yes • No (default)	**Person Search**
Employee User-defined Fields in Advanced Search Field Configuration	Indicates if the section "Employee User-defined Fields" is available in the advanced search.	• Yes • No (default)	**Person Search**
Interest In International Advanced Search Field Configuration	Indicates if the "Interest in International Assignment" field is available in the advanced search.	• Yes • No (default)	**Person Search**
Job Title Advanced Search Field Configuration	Indicates whether the job title field is available in the advanced Search.	• Yes • No (default)	**Person Search**
Management Experience Advanced Search Field Configuration	Indicates if the "Management Experience" field is available in the advanced search.	• Yes • No (default)	**Person Search**
Show the 'Fit' Column in Person Search Result	Indicates whether to show the 'Fit' column on the results page of a person search.	• Yes • No (default)	**Person Search**
Reassignment Candidate Advanced Search Field Configuration	Indicates if the "Reassignment Candidate" field is available in the advanced search. This field is restricted.	• Yes	**Person Search**

Configuration > [Performance] Settings			
Setting Name	**Setting Description**	**Possible Values**	**Setting Category**
		• No (default)	
State Advanced Search Field Configuration	Indicates whether the state field criterion is available in the advanced search.	• Yes • No (default)	**Person Search**
Willing To Relocate Advanced Search Field Configuration	Indicates if the "Willing To Relocate" field is available in the advanced search.	• Yes • No (default)	**Person Search**
Willing To Travel Advanced Search Field Configuration	Indicates if the "Willing to Travel" field is available in the advanced search.	• Yes • No (default)	**Person Search**
Years In Industry Advanced Search Field Configuration	Indicates if the "Years in Industry" field is available in the advanced search.	• Yes • No (default)	**Person Search**
Zip/Postal Code Advanced Search Field Configuration	Indicates if the ZIP/Postal Code field is available in the advanced Search.	• Yes • No (default)	**Person Search**

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 **More Actions > Team Summary**. This prevents employees from seeing organizational information for levels above their place in the organizational hierarchy.

To configure the Talent Browser

Configuration > **[Performance] Settings**

1. To set which employee metrics can be displayed in the Team Summary, go to **Configuration > [Performance] Administration > [Employee Management] Metrics Configuration** and click **Edit** and make the required changes.

   Only the **Display** value is used for the Team Summary in the talent browser. The **Edit** value applies to the Talent Profile.
2. To set the number of employees that can be displayed at one time, go to **Configuration > [Performance] Product Settings > Maximum Number of Nodes in Talent Browser** and select a value between 50 and 200.

   The default value is 100.

Performance > [Navigation bar] Talent Browser is available.

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 *Employee - Review Rating* 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 *Employee - Goal Rating* 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 *Employee - Competency Rating* 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 *Oracle Taleo Enterprise Edition SmartOrg Data Dictionary* 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 *Salary Increase* 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	• Employee Profile - required to display Work Experience and Education details. Manager, Current Position, and Direct Reports are always displayed.
Goal Plan	• Goal Plans - required to display the entire section.
Development Plan	• Development Plans - required to display the entire section.
Succession Plan	• Succession Plans - required to display plan details. • Employee Metrics - required to display metrics.
Career Plan	• Career Plans - required to display the entire section.
Performance Review Ratings	• [Performance] Performance Reviews - required to display the entire Performance section.
Compensation History	• [Compensation] Compensation Data - required to display the entire Compensation section and also the current salary and compa-ratio data.

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

Configuring Filters

All the filters found in the Filter tabs throughout Taleo Performance modules can be hidden or displayed.

Filter configuration settings control the display of each instance of a filter. It is either displayed or hidden for the entire system. For example, Willing to Travel is available in filters for Talent Pools, Talent Browser, Review Calibrations, and Nomination Slates. There is no way for it to only be displayed for pools and the browser, while remaining hidden for calibrations and nominations.

When searching in the Configuration Module for a field to disable you can refine the list of filter fields by context, which displays a list with each of the Taleo Performance modules or pages the filter is used. Subsequently selecting one of the modules displays only those filters used with the module.

Configuration

Go to **Configuration > [Performance] Administration > [Global Configurations] Filters** and click **Disable** or **Enable** for the filters as required.

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	• **[Goal Management] Goal Plan Templates > Goal Plan Name > [Properties]** • **[Employee Management] Talent Profile Section Configuration > [Properties]** • **[Performance Reviews] Review Cycles > Review Cycle Name > [Review Requests] Request Name > [Settings]**

Native Reports

Predefined, delivered reports can be run from within 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.

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.

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: The Organization Chart report is not modifiable by customers using BI Publisher.

Native Reporting Setup

Native Reporting must be configured to be enabled in Performance as must the appearance of a large profile picture in reports, the activation of reports, and the attachment of reports to report correspondence (emails).

Native Reports Configuration

Follow these steps to configure your system to run native reporting:

Step 1: Request Oracle Support to activate a native reporting server in your Oracle Taleo Enterprise Edition zone. Support uses Oracle Taleo Remote Connect Client (RCC) to select **Native Reporting** and **Data Extract** in the JBoss component of the zone setup.

Step 2: Configure setting to enable native reporting in Performance.

Configuration > [Performance] Settings >	
Name	**Description**
Enable Native Reporting	A Private setting. Enables the native reporting feature in Performance. This includes all of the access links for **My Reports** and **Run Reports** found in the user interface along with the ability to create and run reports.

Step 3: Decide which native reports (from among the delivered templates) are required for your implementation, which level of users will have access to native reporting, whether attachments will be enabled, and what content should be included in the email templates.

Step 4: Configure the Performance settings as follows.

User Type Permission. A user type permission enables user access to native reporting, while multiple variables and email templates are used to send results to someone.

Configuration > [SmartOrg] Administration > [Users] User Types > Select User Type > Performance > Team Management > Permissions	
Name	**Description**
Access Reporting	Provides the User Type access to native reports. Note: The two main conditions for a user to have access to native reporting include: • Setting "Enable Native Reporting" to Yes. • Granting the permission "Access Reporting".
Access Report Data	Controls who can view XML data generated by reports. • Only users' who have this permission granted as well as the Access Reporting permission, will be able to view and select the *Download XML* link. • By default, at upgrade all the existing users prior to 15B.6 that already had Access Reporting permissions will now also have the new Access Report Data permissions. The Access Report Data permission will be disabled by default for new users.

Report attachment file size and number. Multiple settings enable reports as attachments to correspondence and control maximum file number and size.

Configuration > [General Configuration] Settings	
Name	**Description**
Attached File Maximum Size	Protected setting. Category is Configuration. The default value is 1MB. If a report exceeds the value it will not be attached to the email notifying the user the report is ready.
Attached File Maximum Number	Protected setting. Category is Configuration. The default value is 10. If a report exceeds the value it will not be attached to the email notifying the user the report is ready.

Configuration > [Performance] Settings	
Name	**Description**
Attachment Enabled	Protected setting. Category is Global Settings. The default value is No. Enables or disables the ability to attach files in Performance.

Email templates and variables. Multiple settings control the use of message templates with report correspondence.

Configuration > [Performance] Administration > [Global Configurations] Message Templates	
Name	**Description**
NR notification for reporting	Native reporting correspondence. Intended when the report is completed, without attachment.
NR notification for reporting with attachment	Native reporting correspondence. Intended when the report is completed, with attachment.
NR notification for reporting - error	Native reporting correspondence. Intended when the report is not completed.
{Report-Notification.ReportName}	This is the name of the report as found in the **My Reports > Name** column or entered in the **Customize this report** section when creating a new report.
{Report-Notification.ReportUrl}	This is the link to the report in Performance. Clicking the link may require you to login, but will then take you directly to the report.

Configuration > [Performance] Administration > [Native Reporting] Reporting Correspondence	
Name	**Description**
Correspondence for completed reports	This email is used for emails that do not include an attached report, so you must ensure the {Report-Notification.ReportUrl} variable is included so recipients can access the report from Taleo Performance.
Correspondence for completed reports with attachments	This email is used when a PDF report does not exceed the maximum file size limit and can be sent as an attachment.
Correspondence for reports not created due to errors	This email is used when there is a report creation error.

General Configuration Settings These global settings are private and apply to any products using native reporting in the zone. Note: Currently Performance is the only product using native reporting.

Configuration > [General Configuration] Settings > Category=Native Reporting	
Name	**Description**
Maximum Extract Processing Time	Maximum number of minutes for report data to be extracted from the system before an error occurs.
Maximum Record Count	Maximum number of employees (records) that can be included in a report. The default of 0 means this setting must be changed before reports can be generated successfully.
Maximum Report Processing Thread Size	Maximum number of reports that can be generated concurrently per client implementation. When the number of report requests and subsequent processing threads exceeds this value, report requests will be put in a queue until they can be processed. The default is 10.
Period Before Request Archival	Number or days before a report is archived. This changes the report status to **Archived** and moves it from the active My Reports list. The default is 5 days. Note this has not been implemented in Performance 12A.
Period Before Request Deletion	Number of days before a report is deleted from the system. The days are measured from the day of the request. The default is 90 days.

Configuration > [General Configuration] Settings > Category=Native Reporting	
Name	**Description**
Period Before Request Failure	Number of days after a report request has been made and a report has not been generated, that it is considered to have failed. The report status changes to **Error**. The default is 1 day.

Step 5: Enable large employee photos for report header sections.

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's 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 reports. For details see *Employee Photo Upload.*

Step 6: To configure and activate reports, log into Performance's Configuration module as administrator.

a. Open the Report Definition page. (Navigation: [Performance] Administration > [Native Reporting] Administration > Report Definition. Repeat the following substeps for each desired report.

b. Click on the Report Definition name to open and view its properties.

c. Review the report properties: Name, Description, Category (Performance module or functional area such as Development Plans, Goal Plans, Reviews, or Talent Profile), Data Model, Report Template file (RTF format), output file formats to be allowed when end-users generate the report, and standard report selection parameters (e.g. population) to appear on the Create Report dialog when end-users generate the report.

d. If needed, set up access permissions for the report based on User Groups or User Roles.

e. If needed, select or deselect Activate to make the report available/not available for use in Performance. Reports activated are added to the Reports list for the zone, are available to end users to run, and can subsequently be deactivated by the administrator.

f. Save any changes.

Native Reporting Administration

Administrators use the following Configuration section and subsections for creating and managing report elements. These include data model and report definitions, and report requests, for both delivered and custom reports:

Native Reporting Management in Configuration

Configuration > [Performance] Administration > [Native Reporting] Administration > [Reporting Management]	
Subsection Name	**Description**
Data Model Definitions	Data model definitions are predefined sets of related reporting entities used to support reporting on Performance module areas. This subsection displays the names of delivered and custom data model definitions (e.g. Development Plan, Goal Plan, Review or Talent Profile). It has two main tabs: 1. **Data Model Definition Management** is used to manage data model definitions for delivered and custom data model definitions. 2. **Data Model Definition Sampling** provides the ability to download sample data models in XML files. These XML files are referenced in report definitions for delivered and custom reports.
Report Definitions	Displays a list of the available delivered and custom report definitions. Also provides the ability to configure custom report definitions; including the name and description, data model, template file, output file format(s), group and role-base access permissions, standard report parameters, and activate/deactivate status.
Request Management	Displays a list of native reporting requests previously run, based on these filters: request identifier, date, owner and status.

Native Reports Group and Role-based Permissions

The Report Definition page provides administrators the ability to create access restrictions for native reports based on groups and roles.

Restriction access controls a user's ability to run a report. Group restrictions are based on administrator created groups containing specific subsets of users. Role restrictions are based on Performance roles:

- EMPLOYEE
- HIGHER_MANAGER
- HRADMIN
- MANAGER
- MATRIX_MANAGER
- MENTOR

Both restriction types, groups and roles, are usable for the same report definition. Only employees fitting the configured restrictions will be able to run a restricted report.

Setting Group Report Access Restrictions

The report definition must first be created.

Configuration > **[Performance] Administration** > **[Native Reporting] Administration** > **Report Definitions**

1. In the Report Definitions section select the report definition Name from the list.
2. On the Report Definition - [Domain] page, next to User Groups, click Add.
3. Use the Refine By selector and associated text entry field to search for the desired user group(s) you want to limit access to the report to.

4. Select the checkbox next to the desired user group(s) you want to limit access to the report to.
5. Once all desired groups are chosen, click Select.

Restrictions display in the User Groups section of the Report Definition - [Domain] page.

Only users fitting the configured restrictions will be able to run a restricted report.

To lift a group restriction click the Remove button next to the restriction listed in the User Groups section of the Report Definition - [Domain] page.

Setting Role Report Access Restrictions

The report definition must first be created.

Configuration > [Performance] Administration > [Native Reporting] Administration > Report Definitions

1. In the Report Definitions section select the report definition Name from the list.
2. On the Report Definition - [Domain] page, next to User Roles, click Add.
3. Select the checkbox next to the desired user role(s) you want to limit access to the report to.
4. Once all desired roles are chosen, click Select.

Restrictions display in the User Roles section of the Report Definition - [Domain] page.

Only users fitting the configured restrictions will be able to run a restricted report.

To lift a role restriction click the Remove button next to the restriction listed in the User Roles section of the Report Definition - [Domain] page.

Native Reporting Data Domains

Native Reporting utilizes delivered data domains to provide structure for delivered reports. Delivered data domains also facilitate and simplify the creation of custom reports. Administrators can also create custom data domains to expand the datasets available for custom reports.

Glossary

The following terms are used in Native Reporting.

Term	Definition
Domain	A hierarchy of data models and datasets, with connected common fields (joins). A domain includes these basic attributes: Name, Code, Base Data Model and Description. The elements of a domain are related together around a common business process or module. For example: Review, Goal or Succession.
Data Model	A hierarchy of datasets (including entities such as dataset fields) connected together by a logical data join, and used in report layout and generation.
Dataset	An entity for reporting, containing a list of exposed fields from a common data model or category (such as Employee, Goal Plan or Review fields).
Component	An entity that is common across datasets in Performance (such as Comments or Position), and can be connected to multiple datasets.

Delivered Data Domains

Data domains delivered for use in native reporting include:

- Career
- Development Plan
- Goal Plan
- Organization Chart (limited availability - a customizable data model is not available for the Organization Chart)
- Succession
- Review
- Talent Pool
- Talent Profile

A list of these delivered domains, plus any created custom domains appears in configuration on the *Data Model Definitions for Deployment page.*

Delivered Data Models

Data models delivered for use in native reporting include these areas of Performance:

- Candidate
- Career*
- Comments
- Development*
- Development Metrics
- Employee*
- Employee Goal Metrics
- Employee Manager
- Employee Measurement
- Feedback
- Goal*
- Goal Measurement
- Job Role
- Position*
- Position Manager
- Requisition (partial availability)
- Review*
- Review Content
- Review Measurement
- Review Metrics
- Succession*
- Talent Pool*
- Talent Profile Measurement*
- Talent Profile*
- User

Note: * These models are the "base" data models from which you can build custom data models.

Native Reporting Custom Data Model Definitions

Native Reporting allows administrators to create custom data model definitions, and perform cross-domain referencing in the definitions, using the *Data Model Definition* and *Data Model Editor* pages in Configuration.

Custom data model definitions provide users the ability to:

- Choose the connection points to bind different data domains and data models together under a custom data model definition.
- Select which data models and datasets are to be used in a custom data model definition.
- Create reports with information drawn from across data domains and data models.

For example, a custom data model definition could contain datasets from the Talent Profile domain, plus additional Development domain datasets.

Custom Data Model Definition Creation

You can create custom data models to expand the datasets (fields) available for making custom reports. There are several base data models from where you can start creating a custom data model definition.

- Career
- Development Plan
- Employee
- Employee Measurement *
- Goal Plan
- Position
- Review
- Succession Plan
- Talent Pool
- Talent Profile

*The Review Measurement Data Model and the Goal Measurement Data Model are not base data models, but can be joined with the Employee Measurement Data Model to emphasize Review and Goal-centric metrics. When this data join is made, the default 5,000 row output restriction typically associated with employee data is lifted and increased to 65,000 allowing for enhanced or aggregated reporting across entire organizations and larger employee populations. While these measurement models do include some of the most essential fields and additional basic data applicable to reviews and goals, they are primarily to be used to obtain metrics across an employee base that exceeds 5,000 records. Additionally, more data can be obtained by joining either of the Measurement Data Models with the Employee Measurement Data Model. If more detailed information from reviews or goals for less than 5,000 employees is needed, you should use the Review Data Model or the Goal Data Model, not these measurement models.

Choosing the base data model to begin with is driven by two main considerations:

1. What subject areas (domains) will the report be built on?
2. What selection parameters will the user need to enter to run the report?

With respect to subject area selection, best practices are:

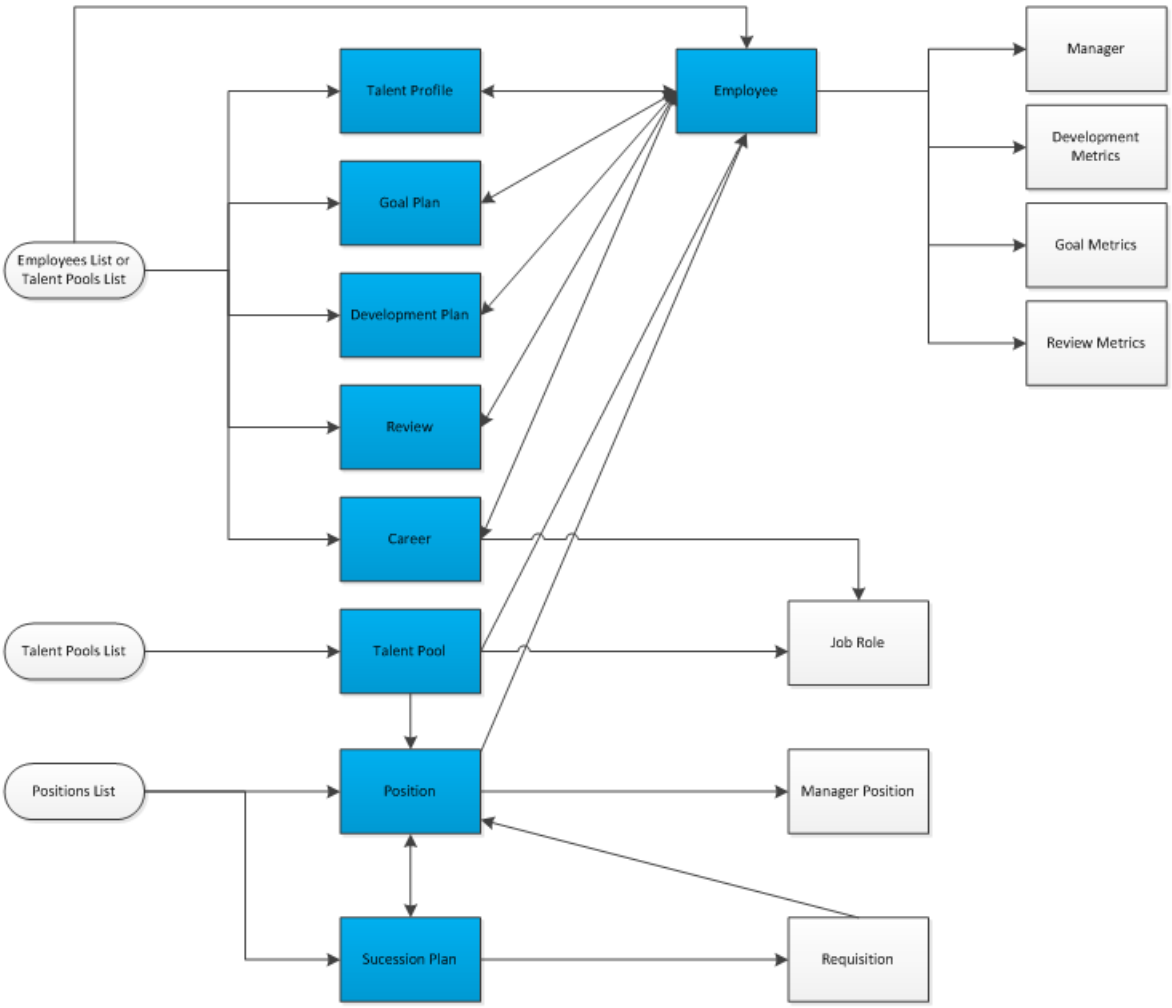
- For a report drawing data from a single domain, choose that domain as the base model. For example, for a strictly review oriented report, choose the review base model. Or for a goal oriented report, choose the goal base model. Such custom reports might differ from the delivered reports due to factors such as dataset (field) selection and layout.
- For a report drawing data from multiple domains, use the employee, position or talent pool data model as the base since they can connect to most of the other domains. Such custom reports will differ from delivered reports not only due to field selection and layout, but also due to their cross-domain referencing.

With respect to report parameter selection, reports can have three types of population selection parameters: Employees, Positions and Talent Pools. The base data model for a report should be chosen based on what populations the user will want to see in the report:

- Employees - Values include Direct Reports, Direct Reports + One Level, All My Employees, Specific Employees and Talent Pool.
- Positions - Values include All My Positions and Specific Positions.
- Talent Pools - Values include All My Talent Pools and Select Talent Pools.

Customers can select which User Defined Fields (UDFs) are included in their custom data models. By default, when you add a new data set to an existing data model, all of its UDFs are also added. However, you can deselect unwanted UDFs from those data models.

The following diagram shows the main connections between some of the base data models (shaded) and other available data models. It also shows the report entry parameters available to run a report for each base model chosen.



Creating a Custom Data Model Definition

The following steps outline the workflow for custom domain and data model creation:

Prerequisite

- You must be an administrative user for Performance with access to the Configuration module.

Configuration > [Performance] Administration > [Native Reporting] Administration > [Reporting Management] Data Model Definitions > [Data Model Definitions for Deployment]

1. Log into the **Configuration** module and navigate to the **Data Model Definitions for Deployment** page, and click the **Data Model Definition Management tab.**
2. Under **Data Model Definition Management** click **Create** to begin the process of creating the custom data model definition.
3. On the **Data Model Definition Editor** page enter the **Name, Code, Description** and select a **Base Data Model** for the custom data model definition. (For example, you might begin by selecting the Employee data model as the base model.) Then **Save.**

4. The **Data Model Definition - [Name]** page opens, displaying the newly created domain's **Properties** at the top. The **Data Model Content** section below displays a tree hierarchy for the base data model, Talent Profile.
5. To begin customizing the data model, click **Edit** next to **Data Model Content.**
6. On the **Data Model Editor** page the full dataset content for the base model is displayed in a collapsible/expandable tree hierarchy. At first, all datasets for the base model are selected at the root.
   - Use the **Checkboxes** to indicate which datasets to include in the model.
   - Use **Add (+)** buttons to add model hierarchy to the data model.
   - **Data models** are only presented as connectible when there is a logical entity relation (join). You do not have to be concerned about whether or not joins are valid, combinations are predefined and limited by the system.
   - Use **X** buttons to remove model hierarchy.
   - As you work with the levels in the hierarchy, view the selectable datasets in the window to the right. There is a maximum limitation of 60 selectable datasets.
7. **Save** any changes.
8. Click **Activate**.
9. The active domain and data model can now be used to create custom reports, in the **Report Definitions** page in **Configuration.**

Editing an Existing Data Model Definition

You want to edit an existing data model definition.

Configuration > **[Performance] Administration** > **[Native Reporting] Administration** > **[Reporting Management] Data Model Definitions** > **[Data Model Definitions for Deployment] Data Model Definition Management**

1. Locate the desired data model definition in the list of existing definitions, and click on it.

   The Data Model Definition - [Name] page opens.
2. Optional. You can make the following types of changes.
   a. Click Delete to remove an inactive definition from the database. This cannot be undone. You cannot delete an active data model definition.
   b. Click Activate/Deactivate to change the definition's status. You cannot deactivate a data model definition if there is an active report definition referring to it.
   c. Click Edit next to Properties, and in that section you can edit the Name, Code and Description.
   d. Click Edit next to Data Model Content, and in that section you can edit the model content for an inactive data domain. You cannot edit an active data model definition.
   e. Save your changes as you go.

When a data model definition is edited and the changes saved, the prior version of the definition is lost. If you need to maintain historical copies of all versions of the data model definition it is recommended you use the duplicate function instead.

Any existing report definitions referencing an edited data model definition are also affected by the change(s).

Duplicating an Existing Data Model Definition

You want to make a copy of and edit an existing data model definition, active or inactive, while maintaining the existing version.

Configuration > **[Performance] Administration** > **[Native Reporting] Administration** > **[Reporting Management] Data Model Definitions** > **[Data Model Definitions for Deployment] Data Model Definition Management**

1. Locate the desired data model definition in the list of existing definitions, and click on it.

   The Data Model Definition - [Name] page opens.

2. Click Duplicate.

   The system makes a duplicate copy of the data model definition while changing the Code with a pre-appended number to distinguish the copied version from the original.
3. Optional. You can make the following types of changes.
   a. Click Delete to remove the newly created definition from the database. This cannot be undone.
   b. Click Activate/Deactivate to change the definition's status. A data model definition cannot be deactivated if there is a report definition referring it.
   c. Click Edit next to Properties, and in the Properties section you can edit the Name, Code and Description. Keep the Code unique from any other versions in the system.
   d. Click Edit next to Data Model Content, and you can edit the model content.
   e. Save your changes as you go.

While the data model definition is copied, edited and saved with a new code; the prior version of the definition having a different code is kept in the database also.

Native Reporting Custom Report Creation

In addition to the delivered native reports, custom reports can be created and run from within Oracle Performance using the Native Reporting feature.

Beginning in Feature Pack 13C Native Reporting is based on the Oracle Business Intelligence Publisher (BI Publisher or BIP). Customer system administrators can use the Oracle BI Publisher plug-in, in association with Oracle Performance's Configuration module, to create custom reports.

BI Publisher provides a plug-in utility for Microsoft Word that automates layout design. It enables you to connect to BI Publisher, access data, and upload templates directly from a Microsoft Word session. The Rich Text Format (RTF) also supports advanced formatting commands and layout options. RTF templates support a variety of output types, including: HTML, PDF, PPT, RTF and XLS.

Editing a Report Definition

The report definition you want to edit must already exist in the system and have inactive status. You cannot edit an active status report definition.

Configuration > [Performance] Administration > [Native Reporting] Administration > [Reporting Management] Report Definitions

1. Locate the desired report definition name on the list and click it to open the Report Definition - [Name] page.
2. Optional. You can make the following types of changes.
   a. Click Delete to remove an inactive definition from the database. This cannot be undone. You cannot delete an active report definition.
   b. Click Activate to change the definition's status.
   c. Click Edit next to Properties. The Report Definition Editor page opens. You can edit the Name, Category, Description, Template File, File Formats and Standard Report Parameters. You cannot edit the Data Model Definition field.
   d. Save your changes as you go.
3. Optional. On the Report Definition - [Name] page you can click Add next to User Group or User Role to edit the report access restrictions.

When a report definition is edited and the changes saved, the prior version of the definition is lost. If you need to maintain historical copies of all versions of the report definition it is recommended you use the duplicate function instead.

Duplicating a Report Definition

The report definition you want to duplicate must already exist in the system.

Configuration > **[Performance] Administration** > **[Native Reporting] Administration** > **[Reporting Management] Report Definitions**

1. Locate the desired report definition in the list of existing definitions, and click on it.
   The Report Definition - [Name] page opens.
2. Click Duplicate.
   The system makes a duplicate copy of the report definition; while changing the Name by appending the word Duplicate to it, and changing the Status to Inactive. This distinguishes the copied version from the original.
3. Optional. You can make the following types of changes.
   a. Click Delete to remove the newly created definition from the database. This cannot be undone.
   b. Click Activate to change the definition's status.
   c. Click Edit next to Properties to open the Report Definition Editor page. You can edit the Name, Category, Description, Template File, File Formats, and Standard Report Parameters. Keep the Name unique from any other versions in the system. You cannot edit the Data Model Definition field.
   d. Save your changes as you go.
4. Optional. On the Report Definition - [Name] page you can click Add next to User Group or User Role to edit the report access restrictions.

While the report definition is copied, edited and saved with a new name; the prior version of the definition having a different name is kept in the database also.

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

Performance and Recruiting Unification

Managers can access Taleo Recruiting information and functions directly from Performance, enabling them to work with — and create — requisitions.

- From the Talent Browser, you can view a summary of the open positions and open requisitions you own and subsequently choose to view the requisition or its candidates in Recruiting
- Also from Talent Browser, you can initiate the requisition creation process, from where the Requisition Wizard is launched and you are taken to Recruiting to complete the task

- From Talent Search results, you can add employees and candidates to your open requisitions directly in Performance

Configuration

The Recruiting module must be enabled and the following user permissions are needed.

User Type Permission	
Name	**Description**
Recruiting > Candidates > Match candidates to requisitions	Required to be able to add someone to a requisition from search results.
Recruiting > Requisitions > View requisitions	Required to be able to view open requisitions.
Recruiting > Requisitions > Create requisitions	Required to be able to create requisitions from the Organization Chart.
Recruiting > Requisitions > Allow access to...	The user must have at least one of the five allow access requisition type permissions to create a new requisition.

8 Performance Management Administration

Configuring Performance Management

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

Permissions Configuration > [SmartOrg] Administration > [Users] User Accounts	
Permission Name	**Setting Description**
	viewing and/or managing rights to performance reviews to be able to view/manage reviews.
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.

Defining the Performance Review Management View

The performance review template allows to define the matrices and charts that are to be available to users when accessing performance reviews via the Team Reviews.

To be able to add charts and metrics to the template, charts and matrices need to have been created first.

Configuration > **[Taleo Performance] Administration** > **[Performance Reviews] Performance Review Template**

1. In the Performance Review Template page, click Add next to Matrices.
2. In the Matrix Selector, select all the matrices that you want users to be able to use when viewing performance reviews and calibrate employee metrics or review ratings and click Select.
3. Define the matrix to be shown by default when opening the matrix view and reorder the available matrices as desired.
4. Click Add next to Charts.
5. In the Chart Selector, select all the charts that you want users to be able to use when viewing performance reviews and calibrate review ratings and click Select.
6. Define the chart to be shown by default when opening the chart view and reorder the available charts as desired.

The selected matrices and charts will be available in the performance review management view for users who have access to this review.

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.	**Configuration** > **[Taleo Performance] Administration** > **[View Modes] Charts**
To define the charts to be available to users when managing performance reviews.	**Configuration** > **[Taleo Performance] Administration** > **[Performance Reviews] Performance Review Template**
To define the charts to be available to users when managing talent pools.	**Configuration** > **[Taleo Performance] Administration** > **[Talent Pools] Talent Pool Template**

Creating a Chart

Configuration > **[Taleo Performance] Administration** > **[View Modes] Charts**

1. From the **Charts** page, click **Create** next to the **Charts** section header.
2. In the **New Chart** page, specify a code and name for the chart and check the desired options.
   a. Click **Save** when done.
3. In the specific **Chart** page, click **Edit** next to the **Axis** section header to specify the axis information.
4. In the **Axis Editor** page, define the axis name of the chart by selecting one of the listed dimension type and specify the labels for each bar of the chart, as well as the desired threshold and benchmark for each bar.

   If you choose a customizable metric, you must match the values to the divisions in a one-to-one relationship, instead of thresholds.

   a. Click **Save** when done.

   All the fields on this page are mandatory.

   By default, there are three divisions (referring to bars). You can add additional bars by clicking **Add** next to the section header, or remove an existing bar by using the **Remove** button of the bar in question.

5. To further define each bar, you can click the label of the bar from the specific **Chart** page and perform any of the following:
    - Update the bar label.
    - Provide a description for the bar.
    - Set a color for the bar by selecting amongst the available colors.
    - Or clear the bar color , if one was applied, by simply clicking the **Clear Cell Color** button.

    a. Click **Save** to register your changes.
6. If you want the bar detail to show additional information about the employees in the bar, you can select various employee metrics to be shown in the bar detail page. To do so, click **Add** next to the **Detail Metrics** section header.
7. In the **Metric Selector** page, select the metrics you want to show in the bar details.
    a. Click **Select.**
8. For the metrics to show as columns in the bar detail page, you must check the **Show in Detail** option. By default, this option is selected so there is not need to edit a detail metric.
    a. Click **Save** when done.
9. Next, you can order the selected metrics so that they show in the order you specify. To do so, click **Reorder** next to the **Detail Metrics** section header.
    a. Select one metric and use the up or down arrow to move the metric to the desired order. Repeat until all metrics are showing in the desired order.
    b. Click **Save** when done.
10. At last, make sure to activate the chart if you want it to be available for selection when adding a chart to a template.

The chart is now created and activated. A chart that is activated and included in a template can not be deactivated and only the chart labels and colors can be modified.

Once created and activated, the chart can be added to a performance review, succession plan or talent pool template.

Making Charts Available to Users

To make a chart available to users, the chart must be added to the talent pool template or the performance review template, where the chart view is possible.

Configuration > **[Taleo Performance] Administration** > **[Talent Pools] Talent Pool Template**

Configuration > **[Taleo Performance] Administration** > **[Performance Reviews] Performance Review Template**

1. From either the **Performance Review Template** or the **Talent Pool Template**, click **Add** next to the **Charts** header section.
2. In the **Chart Selector** page, select the charts you want users to have access to in the performance review center or in talent pools, depending on the selected template.
    a. Click **Select**.

    The charts listed correspond to charts that were previously created and activated.
3. Back to the template page, you can define the display order of the charts as well as which one will show by default when accessing the chart view.
    - Click **Edit** to open the **Talent Pool Template** or the **Performance Review Template** page, where you can select the default chart. Click **Save**.

- Click **Reorder** to open the **Reorder Charts** page and use the down or up arrow to move the selected chart to the desired order. Click **Save**.

Once added to the template, a chart will be available to users who access the chart view of talent pools or performance reviews.

Performance Matrix

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

Creating a Matrix

Configuration > [Performance] Administration > [View Modes] Matrices

1. From the **Matrices** page, click **Create** next to the **Matrices** section header.
2. In the **New Matrix** page, specify a code and name for the matrix and check the desired options.

   Allow employee metric updates enables an employee's metrics to be updated directly from a succession plan matrix, replacing their existing talent profile metrics with those from the succession matrix.

   Show cell distribution includes percentage details in the bottom right of each cell, as a representation of what percentage of the total number of people are in the cell.
   a. Click **Save** when done.
3. In the specific **Matrix** page, click **Edit** next to the **X Axis** section header to specify the column information.
   a. In the **Axis Editor** page, define the column name of the matrix by selecting one of the listed dimension type.
   b. Add or remove columns as needed.
   c. Specify the labels for each column of the matrix, as well as the desired threshold for each column.

      NOTE: If you select a configurable metric dimension type, you then select a custom value to match the division instead of a threshold. The values available are dependent on how the configurable metric has been set up.
   d. Click **Save** when done.
4. To define the rows of the matrix, click **Edit** next to the **Y Axis** section header.
   a. In the **Axis Editor** page, define the row name of the matrix by selecting one of the listed dimension type.
   b. Add or remove rows as needed.
   c. Specify the labels for each row of the matrix.

      NOTE: If you select a configurable metric dimension type, you then select a custom value to match the division instead of a threshold. The values available are dependent on how the configurable metric has been set up.
   d. Click **Save** when done.
5. In the **Matrix Cells** section, click **Edit** for each cell to which you want to assign a specific label and color, if so required.
   a. Click **Save** to register your changes.
6. If you want the cell detail to show additional information about the population, you can select various employee metrics to be shown in the cell detail page. To do so, click **Add** next to the **Detail Metrics** section header.
7. In the **Metric Selector** page, select the metrics you want to show in the cell details.
   a. Click **Select.**
8. For the metrics to show in the cell or as columns in the cell detail, click **Edit** next to **Detail Metrics** and then check the **Show in Detail** and/or **Show in Cell** option, as required.
   a. Click **Save** when done.
9. Next, you can order the selected metrics so that they show in the order you specify. To do so, click **Reorder** next to the **Detail Metrics** section header.

a. Select one metric and use the up or down arrow to move the metric to the desired order. Repeat until all metrics are showing in the desired order.
b. Click **Save** when done.

10. At last, make sure to activate the matrix if you want it to be available for selection when adding a matrix to a template.

The matrix is now created and activated. A matrix that is activated and included in a template can not be deactivated and only the cell labels and colors can be modified.

Once created and activated, the matrix can be added to a performance review, succession plan or talent pool template.

Making Matrices Available to Users

To make a matrix available to users, the matrix must be added to the talent pool template, the performance review template or the succession plan template, where the matrix view is possible.

Configuration > **[Taleo Performance] Administration** > **[Talent Pools] Talent Pool Template**

Configuration > **[Taleo Performance] Administration** > **[Performance Reviews] Performance Review Template**

Configuration > **[Taleo Performance] Administration** > **[Succession Planning] Default Succession Plan Template**

1. From either the **Performance Review Template**, the **Talent Pool Template**, or the **Default Succession Plan Template Management** page, click **Add** next to the **Matrices** header section.
2. In the **Matrix Selector** page, select the matrices you want users to have access to in the performance review center, in talent pools or in succession plans, depending on the selected template.
   a. Click **Select**.

   The matrices listed correspond to matrices that were previously created and activated.

3. Back to the template page, you can define the display order of the matrices as well as which one will show by default when accessing the matrix view.
   - Click **Edit** to open the **Talent Pool Template**, the **Performance Review Template** or the **Succession Plan Matrix Editor**page, where you can select the default matrix. Click **Save**.
   - Click **Reorder** to open the **Reorder Matrices** page and use the down or up arrow to move the selected matrix to the desired order. Click **Save**. Note that this option is not available in the succession plan template.

Once added to the template, the matrix will be available to users who access the matrix view of talent pools, performance reviews or succession plans.

Using Performance Review Administration

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.

Review-Goal Plan Synchronization

This enables you to keep goal and review information in synchronization during the initial stages of the review process, until the employee submits their self-assessment or the manager submits their employee evaluation.

It is not always possible for an employee's goal plan to be finalized in time for the start of the performance review process; also, subsequent changes to a review can still impact the information contained in a goal plan. Review-Goal Synchronization provides the ability to ensure the details are synchronized between the two.

When items are synched, an icon is displayed in the list of goal-related review items. This indicates that any modifications made to their content will automatically be updated in any item that has a reference to it, and vice versa.

Before a performance review is submitted, the following actions are synched:

Synched Actions	
Performance Review to Goal Plan	**Goal Plan to Performance Review**
• Add or edit goals and competency goals* • Edit or delete sub-goals and competency sub-goals • Create, edit, or delete tasks *Since the main goal element must already exist in the system you cannot create a new one within the review and have it synch back to the goal plan. Custom goals can be created within the review, but they will not be synched back to the goal plan. Deleting goals in a review only deletes them in the review, they will remain in the goal plan.	• Create, edit, or delete goals and competency goals • Create, edit, or delete sub-goals and competency sub-goals • Create, edit, or delete tasks

Once a performance review self-assessment is submitted by an employee or the manager submits their employee evaluation, the review items and goal items are no longer synched.

In the case that a review is restarted, the goals that existed in the review before the review was restarted will not be in synch with goals in the goal plan. However, after the review has been restarted, the user can add new goals to the review from the goal plan(s). These newly added goals will be in synch with the goals in the respective goal plan(s) until the review is re-submitted. In other words, when new goals are added to a restarted review,it is possible for a user to have a mix of goals that are in synch with the goal plan and those that are not, within the same review.

Note: Review comments are not synched.

Technical Overview
If Review-Goal Synchronization is enabled, when the performance reviews are initially created from the goal plans, the review items are linked to the goal items. The goal items are the primary version and the main, parent record in the system, as the review items - while separate objects in the system - maintain a reference to the goal items. When a change is made to a review item (listed above) and saved, it updates the goal item record. At

Technical Overview
the point where the employee self-assessment or manager evaluation are submitted, the information from the goal item is copied over to the review item and references from the review items to the goal items are severed. From this point onward, the items are completely separate objects.

Configuration

One product setting and user type permissions to access goal plans and performance reviews are required.

Product Setting	
Name	**Description**
Enable Review-Goal Synchronization	This private setting is required to enable Review-Goal Synch. This setting should not be changed while there is an active review process taking place. It should only be changed after all open reviews are closed or canceled, and before subsequent reviews are generated from goal plans. The default value is **No**.

You must have *Manage* user type permissions for Performance Reviews and Goal Plans to be able to use the Review-Goal Sync functionality. Regardless of whether a review or goal is updated first, the goal plan permissions are checked first to see whether synchronization should occur. The combination of permissions you have impact synchronization as follows:

Action	User Type Permissions Needed
Review - View Review Items	• View Review
Review - Edit Review Items	• View Review • Manage Review
Review - Create Review Item	• View Review • Manage Review
Review - Delete Review Item	• View Review • Manage Review
Goals - View Goals	• View Goal Plan
Goals - Edit Goals	• View Goal Plan • Manage Goal Plan
Goals - Edit Sub-Goals	• View Goal Plan • Manage Goal Plan
Goals - Edit Tasks	• View Goal Plan • Manage Goal Plan
Goals - Add/Delete Tasks	• View Goal Plan • Manage Goal Plan

Action	User Type Permissions Needed
	• View Review • Manage Review
Goals - Edit UDFs	• View Goal Plan • Manage Goal Plan • View Review • Manage Review
Goals - Create Goals	• View Goal Plan • Manage Goal Plan • View Review • Manage Review
Goals - Delete Goals	• View Goal Plan • Manage Goal Plan • View Review • Manage Review

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.

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]**

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:

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.

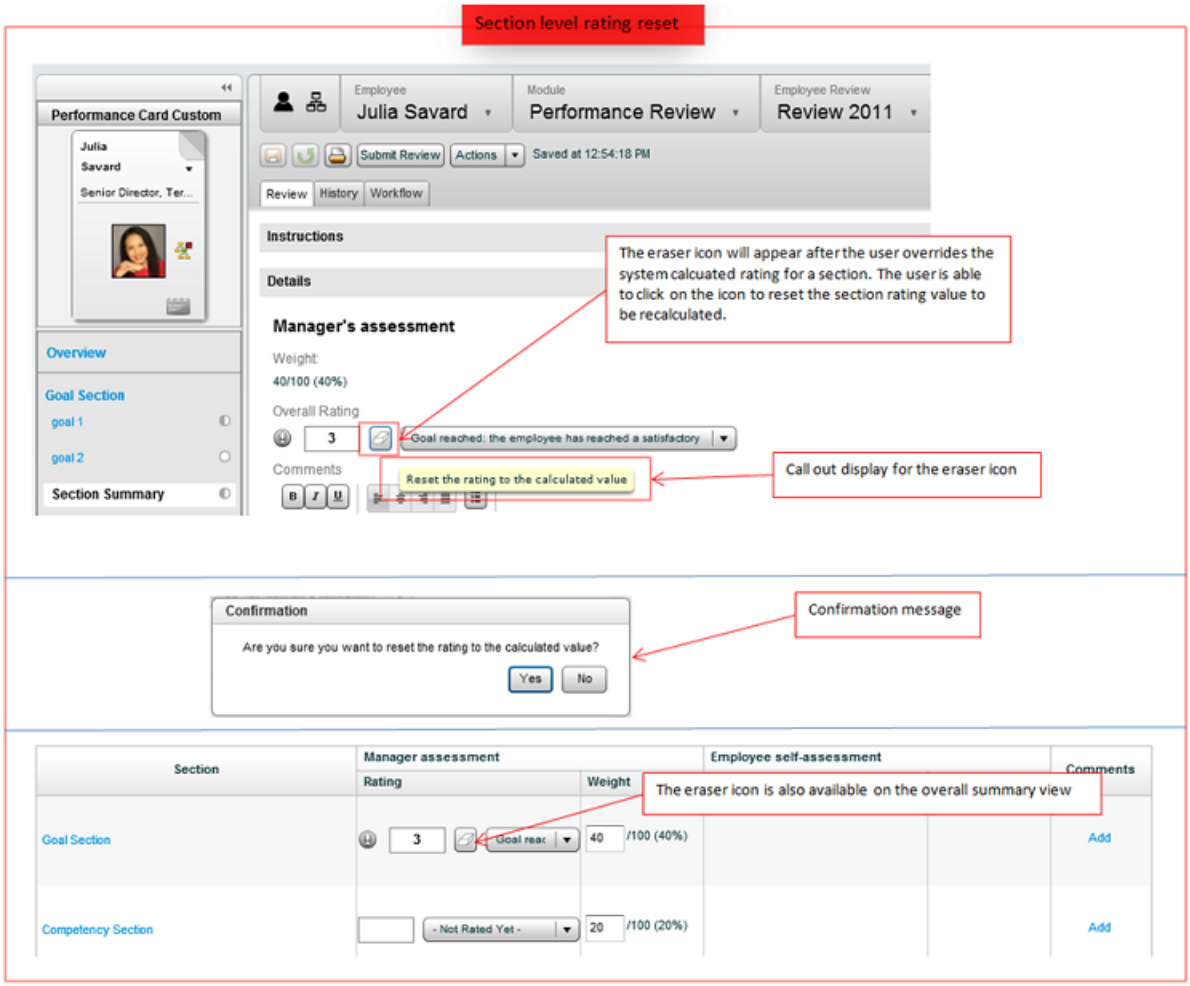
The overall rating is calculated based on the ratings and weights of each of the sections after rounding.

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.

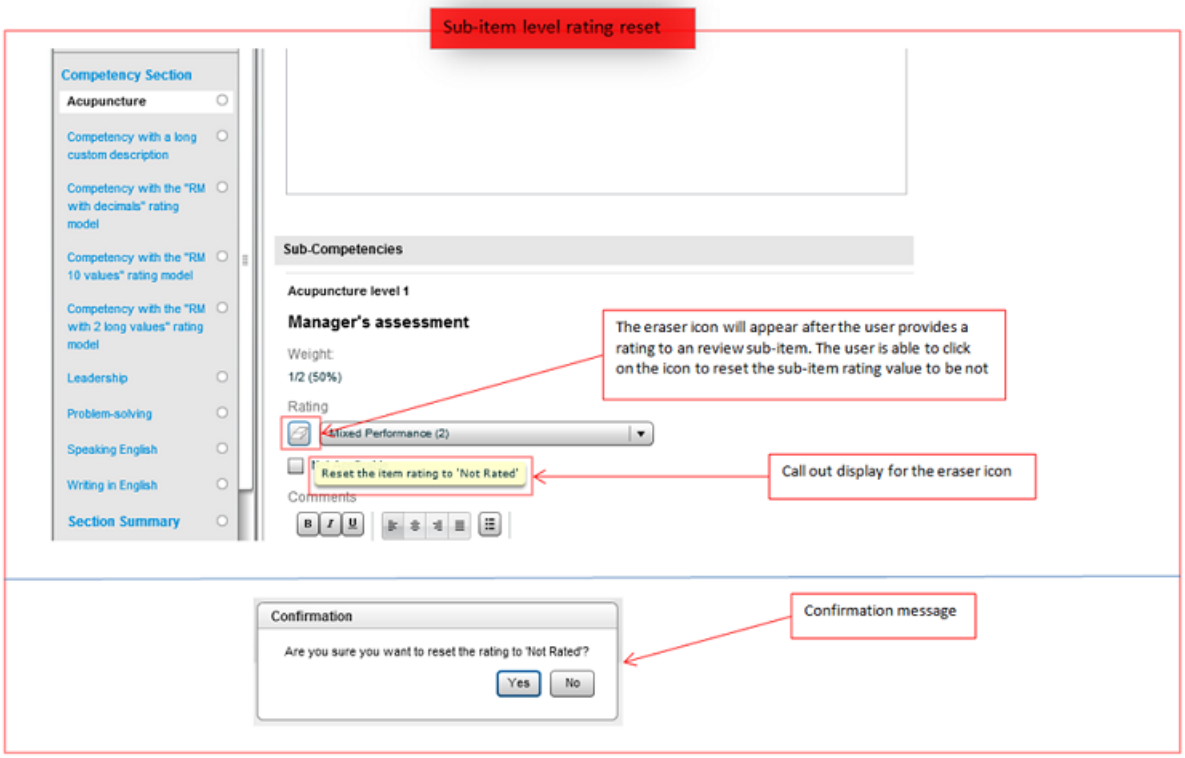
Resetting a rating at the Review Item level could potentially impact the Review Section/Overall rating, therefore:

- 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.



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=3.666666666666666 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: 3.666666666666666 becomes 3.67
- Number of decimals=1: 3.666666666666666 becomes 3.7
- Number of decimals=0: 3.666666666666666 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 3.666666666666666 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.

Weighting

Weighting is used to specify how much a given section and/or item contributes to the calculation of the overall rating in comparison with the other sections and/or items.

Sections within a definition and items within a section can be configured to be included in or excluded from the calculation of the overall rating and set to be displayed or hidden on the employee's performance review.

In the Performance, the weight, when set to be active, is shown on the Summary of the review as well as on the Summary of each review section. The weights are expressed as a fraction, to represent the individual weight over the total weight, and as a percentage, to show the translation of the weight over 100. When set to be displayed, the weight is presented as follows:

When the weights are set automatically by the application, by selecting the Weight Equally Distributed option, the weights are set to total 100, or to the closest value. However, when not equally distributed, the total weight does **not** have to equal 100 as the weight value is interpreted as a given value over the total of all specified weights.

Whether users are entitled to weight items or sections in a review and how the weight is displayed and calculated are determined by the following settings:

- **Show Section Weight** to indicate that weight values are to be displayed in the review.
- **Allow to Weight Sections** to entitle the manager, employee and/or calibrator to edit the weight of sections within a review.
- **Allow to Weight Items** to entitle the manager, employee and/or calibrator to edit the weight of items in a section.
- **Weight Equally Distributed** to have the weight of all the sections in a review and/or all items in a section equal.
- **Exclude from Overall Weighting** to exclude the section or item from the calculation of the overall rating. When checked, the related weight is brought back to 0. If the option is checked, the weight of the ‘included' sections

or items will be adjusted automatically; however, if this option is not checked, no automatic weight adjustment is performed, the total weight will just be less.

It is important to note that when completing the review, the weight of a given item or section is managed separately in the self-assessment and in the manager's review of the employee. Therefore, changing a weight on the self-assessment, for example, has no impact on the manager review. This situation only occurs for review requests that include a self-assessment and for which the employee can either edit the weights or use the “Not Applicable” rating, as these are the only two actions that can have an effect on the weight. However, In a collaborative review, there is only one review for both the employee and the manager; therefore if the manager or employee changes the weight or sets a rating to “Not Applicable”, the review is affected directly.

Configuring a Performance Review

Configuring a performance review is the process by which the review form content and the review cycle are defined.

Before defining a performance review, there are some preliminary foundation data that need to be configured and some tasks executed.

- Definition and activation of the rating models to be used in the performance review to rate the employees. (See *Working with Rating Models*)
- Definition and activation of the competencies to use to evaluate the performance of employees so they can be included in a review form. (See *Working with Competencies*)
- Optional - Definition and activation of job roles and profiles if competencies are to be dynamically included in the review form based on employee job roles. (See *Working with Job Roles*)

1. Define the content of the performance review. (See *Defining a Review Form*)
2. Define the review cycle during which employees will be evaluated. (See *Defining a Review Cycle*)

Once both the review definition and cycle are configured properly, the performance review will be assigned to the designated employee at the specified date.

Defining a Review Form

Defining a review form allows to determine the content of a performance review. A review form is most often composed of various sections and items to be evaluated. The configuration of a review form can follow two major workflows.

- Active rating models (see *Working with Rating Models*)
- Active review section templates, if adding review sections (see *Working with Review Section Templates*)
- Active review text titles and instructions, if using existing text from the Review Text Library (see *Working with Review Text*)

Configuration > [Taleo Performance] Administration > [Performance Reviews] Review Definitions

1. Depending on how you want to build the content of the review, do one of the following:
   - If you want to create the entire content of the review form from scratch, go to step 2.
   - If you want to build the review's content by using section templates and want to use existing titles and instructions from the Review Text Library, you will need to **define and activate review section**

templates (see *Working with Review Section Templates*) as well as **define and activate review text titles and instructions** before creating the review definition (See *Working with Review Text*).

2. Create a review definition by defining the review definition's properties and various settings. (See *Creating a Review Definition*)
3. Create or add the review sections to be included in the performance review. (See *Creating a Review Section* or *Adding a Review Section*)
4. For the newly created sections, create or add section items and sub-items, if applicable. (See *Creating a Section Item* or *Adding a Section Item*)
5. If needed, contextualize the review titles and instructions according to specific raters or review statuses. (See *Creating a Contextualized Value*)
6. Activate the review definition. (See *Activating a Review Definition*)

Once defined and activated, the review definition, with its associated sections and items, will be available for selection when defining the review request groups part of the review cycle.

Defining a Review Cycle

Defining a review cycle allows to set up the period covered by a cycle, the employees to be evaluated during that cycle, the review process applicable for each request and the review definition used for each.

It is recommended to define the review form beforehand so the review definition can be selected in the review request group. (See *Defining a Review Form*)

Configuration > [Taleo Performance] Administration > [Performance Reviews] Review Cycles

1. Create a review cycle by defining the cycle's properties. (See *Creating a Review Cycle*)
2. Create a review group to determine the employees to be evaluated by defining the group's properties and create, if needed, review group constraints to define specific groups of employees. (See *Creating a Review Group* and *Creating a Review Group Constraint*)
3. Create the review request by defining the request's properties, settings, process definition, process definition parameters and the necessary approvers when applicable. (See *Creating a Review Request*)
4. Create the review request group to determine the review definition to use for the request and the review group of employees to assign the review to. (See *Creating a Review Request Group*)
5. Activate the review request so the review forms based on the selected review definition can be assigned to the selected group of employees. (See *Activating a Review Request*)

Once the review cycle is defined and the review request activated, the reviews are assigned to the appropriate employees on the defined dates.

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
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 > *Name* > 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.
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.

Externally Calibrated Overall Review Ratings

Some organizations do performance reviews in Oracle Taleo Enterprise Edition Performance Management and complete review calibration in an external third-party tool. The Import Overall Review Rating feature allows administrators to use the Taleo Connect Client (TCC) to bulk import the final, overall review ratings back into the Review Details Summary sections of active reviews in Performance.

Administrators are able to bulk import overall review rating scores only, not section-level scores (such as for goals or competencies). Optionally, they may also update the comments associated to those overall review rating scores. The

override is performed in bulk using the Taleo Connect Client (TCC). The net effect of the import is similar to when a user overrides individual overall review rating scores from within the Performance user interface.

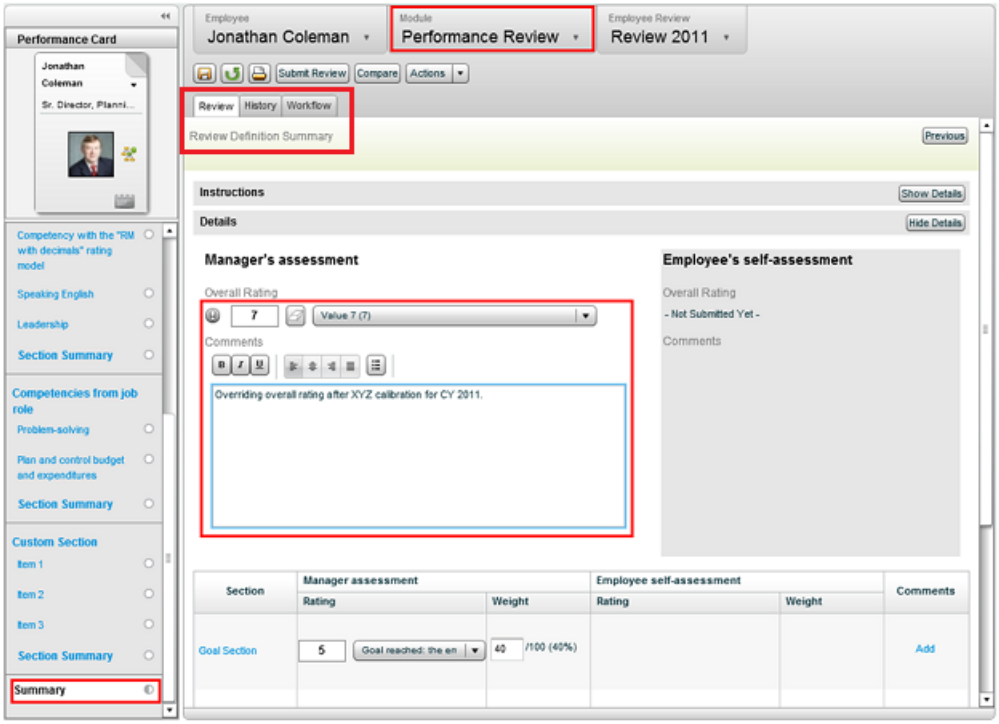
Business Process Overview

Prerequisites:

- The user has Integration functional domain permissions.
- The user performs the bulk update on behalf of individual managers or calibration owners in charge of their team's reviews.
- An updated TCC import template file is used.
- The "Allow to override overall rating - Manager" configuration setting (a checkbox) must be selected. (Navigation: [Performance] Administration > [Performance Reviews] Review Definitions > Settings by Rater section.

Note: The integration user will receive a TCC error if the above is not configured, or is improperly configured.

1. User creates a CSV file containing the following columns: Overall Score, Employee ID, Review Request Code, Review Cycle Code, and optionally the Review Entry Comment. See "TCC Import File" below for additional information.
2. User configures in TCC the BasicReviewEntryUpdateOverallRating.xml import template.
3. User runs operation in TCC for bulk import.
4. TCC client connects to the Performance system.
5. TCC performs a bulk import operation to identify the records and updates the overall review rating scores.
6. TCC logs import success or failure statuses accordingly.
7. User views imported data in the Review Definition Summary section of Performance Reviews module. Imported scores appear as "overridden" scores in the user interface.



TCC Import File

A TCC Import update template file (CSV) is used to provide many of the specifications facilitating the overall review score import. Columns for the CSV import file are as follows, and can be adapted to incorporate additional fields if needed:

Column Name	Mandatory/Optional	Data Type	Use
Overall Score	Mandatory	Number	Actual overriding calibrated final review score.
Employee ID	Mandatory	String	Unique identifier used in the Performance system of the employee whose overall review rating score is to be updated. Exportable and used in the external system.
Review Request Code	Mandatory	String	Unique identifier, defined in Performance, of the review request whose score is to be updated. Available to the Performance system administrator from the Administration user interface.
Review Cycle Code	Mandatory	String	Unique identifier, defined in Performance, of the review cycle whose score is to be updated. Available to the Performance system administrator from the Administration user interface.
Review Entry Comment	Optional	String	Override comment associated with the overall review rating score to be updated.

Note: Calibration within Performance is restricted to 1,000 employee scores at a time. TCC is not bound by this restriction, you can import more than 1,000 calibrated scores at a time.

Configuration

No new or modified configuration settings are created by this feature.

- Import operation must be performed by a user who has Integration functional domain permissions in the Configuration module.
- The "Allow to override overall rating - Manager" configuration setting (a checkbox) must be selected. (Navigation: [Performance] Administration > [Performance Reviews] Review Definitions > Settings by Rater section.

Importing Overall Review Ratings with TCC

- Review ratings have been calibrated externally to Oracle Taleo Enterprise Edition to ensure consistency in ratings across the organization.
- User is an Administrator designated as the calibration owner, and must have Integration functional domain permissions set in the Configuration module.
- User must have access to, working knowledge of and experience using the Oracle Taleo Connect Client (TCC).
- The Manager Review Overall Score setting must be set to "overridable" in the Configuration module (Navigation: **Configuration > [Taleo Performance] Administration > [Performance Reviews] Review Definitions > Settings by Rater > Allow to override overall rating - select checkbox.)**

Navigation: **Taleo Connect Client (TCC)**

1. Click TCC start icon and log in with Username and Password.
2. Enter Connectivity information on the **Ping the Taleo Product** dialog.
   a. Enter the **Product, Endpoint** server, **Host** and **Authentication.**
   b. Click **Ping.**
3. Set up the import template.
   a. Select **File New New Import Wizard.**
   b. In **Select A Service** enter the **Product** (e.g. Performance 14A), **Model,** (e.g. Performance 14A), and choose *Review Entry* from the provided list of filters.
   c. In **Template** select **Use the Following Import Template**, and choose *Basic ReviewEntryupdateOverallRating* from the dropdown.
   d. Click **Finish.**
   e. Save as **BasicReviewEntry_updateOverallRating_Id.xml.**
4. Setup the sample CSV file.
   a. Click the **Generate a sample CSV file** icon on the top toolbar.

      The Design view for the BasicReviewEntry_updateOverallRating_Id.xml file displays.
   b. Under Outline click General to display the General pane. Make sure the Header Present checkbox is selected.
   c. Under Outline click Columns to display the Columns pane. Under Parameter/Structure locate and select the mandatory values (columns) you want to have appear in the import file, for the review under calibration (i.e. Overall Score, Employee ID, Review Request Code and Review Cycle Code).

      View the list of values building in the hierarchy under Outline > Columns.
   d. Optional. You can add the **Override Comment** (Review Entry Comment) column to the list. It is only allowed when the rest of the mandatory values (fields or columns)) for updating the overall review rating score are listed.
   e. Set the **Allow to Override Rating**to **Yes**.
   f. Save the sample CSV file as *UpdateOverallRatingCalibration.csv.*
5. Set up the configuration file.
   a. Select **File > New > >New Configuration Wizard** from the top toolbar.
   b. On the **Content** screen select **Based on another type of request message.**
   c. Select **BasicReviewEntry_uploadOverallRating_Id.xml.**
   d. Click **Next**.
   e. On the **Environment Connectivity** screen select the **Endpoint** server for your zone.
   f. Click **Finish**.
   g. Save as **BasicReviewEntry_updateOverallRating_cfg.xml.**
6. Run the **Update Overall Rating** process.
   a. Click the **Process** button.
   b. In the **Execute Configuration** dialog enter the **Request File**, and enter the **Response File** as *UpdateOverallRatingCalibration.csv.*
   c. Click **OK.**
   d. The URL link to the output file appears in the right side TCC Monitoring pane. Click the link to view the CSV output file.

The overall review rating scores from calibration are imported to the active reviews in Performance.

You can review the results in the CSV output file.

Verify the data import using the Performance Reviews module user interface, on the **Review Definition Summary**>**Review Details** section.

Employee Metric Calibration

Employee metric calibration provides the ability to compare various groups of employees/candidates and to rate their employee metrics (performance, potential, risk of loss, etc) and current review metrics (current review rating, current review goal rating and current review competency rating) with respect to one another.

The calibration of employee metrics can be performed in the following contexts:

- via the matrix or chart view of a talent pool, to adjust the employee metrics of employees or candidates in that pool;
- via the chart view of a group of performance reviews, to adjust the employee metrics of the related employees;
- via the matrix view of the succession plan, to move successors around in the matrix.

The employee metrics that can be calibrated are drawn for the Employee Metrics section of the Talent Profile and the current review ratings of the Performance Review.

When a metric is adjusted via the chart or matrix, it is important to perform the update action of the metrics for the change to be committed definitively and reflected back in the Talent Profile and Performance Review.

Configuration

User type permissions required to entitle users to calibrate employee metrics via talent pools:

Permissions Configuration > [SmartOrg] Administration > [Users] User Accounts	
Permission Name	**Setting Description**
Performance > **Employee Metrics** > **View**	With employee metric viewing permissions, the user is entitled to view employee metrics and to perform calibration on metrics for his own use. That means the calibrated metrics will not be updatable.
Performance > **Employee Metrics** > **Manage**	With employee metric managing permissions, the user is entitled to view and manage employee metrics, therefore to perform calibration on metrics and to update the metrics so that the calibrated values are shown in the Talent Profile.
Common > **Pools** > **View**	To perform employee metric calibration within the talent pool context, the user need to be entitled to view talent pools.

User type permissions required to entitle users to calibrate employee metrics via performance review management center:

Permissions Configuration > [SmartOrg] Administration > [Users] User Accounts	
Permission Name	**Setting Description**
Performance > **Employee Metrics** > **View**	With employee metric viewing permissions, the user is entitled to view employee metrics and to perform calibration on metrics for his own use. That means the calibrated metrics will not be updatable.
Performance > **Employee Metrics** > **Manage**	With employee metric managing permissions, the user is entitled to view and manage employee metrics, therefore to perform calibration on metrics and to update the metrics so that the calibrated values are shown in the Talent Profile.
Performance > **Performance Reviews** > **Access via Manager Center**	This permission grants the Manager user access to performance reviews via the Navigation bar > More dropdown > Team Reviews link.
Performance > **Performance Reviews** > **View**	To perform employee metric calibration within the performance review context, the user need to be entitled to view reviews.

User type permissions required to entitle users to calibrate employee metrics via succession plans:

Permissions Configuration > [SmartOrg] Administration > [Users] User Accounts	
Permission Name	**Setting Description**
Performance > **Employee Metrics** > **View**	With employee metric viewing permissions, the user is entitled to view employee metrics and to perform calibration on metrics for his own use. That means the calibrated metrics will not be updatable.
Performance > **Employee Metrics** > **Manage**	With employee metric managing permissions, the user is entitled to view and manage employee metrics, therefore to perform calibration on metrics and to update the metrics so that the calibrated values are shown in the Talent Profile.
Performance > **Succession Plans** > **View**	To perform employee metric calibration within the succession plans context, the user need to be entitled to view succession plans.

To define the matrix or the chart view modes available in talent pools or in the performance review management view, the associated template must be configured accordingly. The matrices and charts are selected from a list of active matrices or charts, that must have been created and activated first to be available for selection.

Configuration Actions	Paths
To manage existing charts and to create new ones.	**Configuration** > **[Taleo Performance] Administration** > **[View Modes] Charts**
To manage existing matrices and to create new ones.	**Configuration** > **[Taleo Performance] Administration** > **[View Modes] Matrices**
To define the charts and matrices to be available to users when managing performance reviews.	**Configuration** > **[Taleo Performance] Administration** > **[Performance Reviews] Performance Review Template**
To define the charts and matrices to be available to users when managing talent pools	**Configuration** > **[Taleo Performance] Administration** > **[Talent Pools] Talent Pool Template**

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.

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).	• Disabled (default value) - Autosaving is disabled for the application. • Idle - Autosaving will only be done after a certain period of idle activity has elapsed. • Automatic - Autosaving is always on, even if the user is interacting with the application.	Global Settings
Autosave Interval	Indicates the amount of time between automatic saves. The autosave interval differs based on the type of autosave. 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 interval will correspond to the time between each autosave.	• 2 minutes • 5 minutes (default value) • 10 minutes • 20 minutes	Global Settings

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	**Configuration** > **[Taleo Performance] Administration** > **[Performance Reviews] Review Cycles** • Select a review cycle • Select the desired review request • In the Settings section, this setting must be active

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 manger or higher-level manager opens the Team Review page the following processing logic occurs:

1. The My Direct Reports option is selected by default.

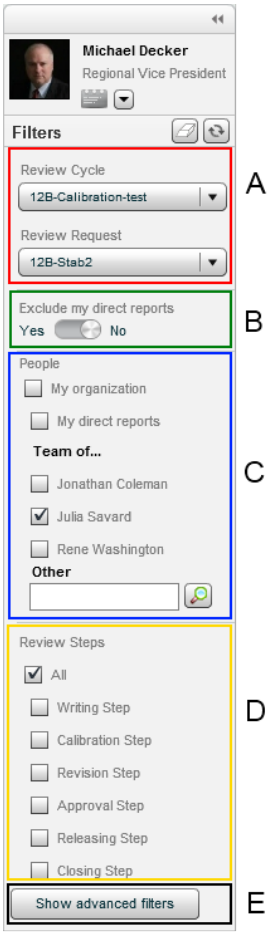
2. This generates a list of review items for employees who are the direct reports to the login user.
3. Based on the list of employees, the system figures out what is the latest review cycle and populates the value in the Review Cycle filter.
4. Based on the latest review cycle, the system figures out 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.

Example: 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. The options available in the **Review Steps** filter are dependent on these values.
- **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**.

Memorized Filters

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.

The filter language has also been changed from having an option of *Not Set* to instead having the option of *All*. The default value displayed for Review Cycle and Review Request are the current Review Cycle and Review Request.

One new filter has been added to Goal Plans, *Business Period*. The default value for this filter is the current Business Period.

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.

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.	**Configuration** > **[Taleo Performance] Administration** > **[View Modes] Charts**
To define the charts to be available to users when managing performance reviews.	**Configuration** > **[Taleo Performance] Administration** > **[Performance Reviews] Performance Review Template**
To define the charts to be available to users when managing talent pools.	**Configuration** > **[Taleo Performance] Administration** > **[Talent Pools] Talent Pool Template**

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.

Review Collaborators v. Matrix Managers		
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

Review Collaborators v. Matrix Managers		
Task or Action	**Tasks that can be done by a collaborator**	**Tasks that can be done by a matrix manager***
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

Working with Review Definitions

Review Definition

The review definition forms the basis of the performance review form and defines all of its content with regard to the related properties and settings. Although there are various types of reviews, the focal review type is considered to be the official review and is the source of review information displayed in the employee and manager centers.

The review definition defines the sections of the form and the content of the performance review form (including its properties, display and rating). You can define the default text values for the review name and screen instructions, select the overall rating model, and specify details on the content included in the Summary and Overview sections of the

review (such as employee demographic data and review process information). You can also specify whether ratings are displayed as numerical values or as text.

A review definition must be activated for the review process to be defined and the performance review assigned.

Viewing a Review Definition

Viewing a review definition allows to view the properties, the settings as well as the associated sections of the selected review definition.

Configuration > **[Taleo Performance] Administration** > **[Performance Reviews] Review Definitions**

1. In the **Review Definition Management** page, click the name of the review definition to be viewed.
2. In the **Review Definition** page, use the **Show** link to display the related information.

The review definition information displays in the **Review Definition** page.

Creating a Review Definition

Creating a review definition is the first step in defining a performance review form and is automatically done through a wizard that guides you through the entire creation process.

Configuration > **[Taleo Performance] Administration** > **[Performance Reviews] Review Definitions**

1. In the **Review Definition Management** page, click **Create** next to **Review Definition**.
2. In the **Review Definition Wizard** page, start by specifying the new definition's properties and click **Next**.
3. On the next page, specify the information to be displayed on the review form as well as what is mandatory by checking all applicable settings and then click **Next**.
4. On the next page, specify the settings per type of rater and click **Next**.
5. On the last page of the wizard, verify all the information provided and if needed, go back to a previous page by clicking **Previous** to make any changes.
6. When all information is as desired, click **Finish** to complete and save the review definition.

The name of the new review definition displays in the title of the **Review Definition** page and shows a Draft status.

Once created, the review definition must be activated to be available for selection in a review request group, which will trigger the assignment of the appropriate review forms.

Defining the Overall Rating Display Format

Defining the overall rating display format allows the system administrator to specify first if ratings are to be hidden or displayed on the review form and when displayed, which of the three components are to be shown. An overall rating can be defined for the review summary and for the section summary.

To be allowed to set the overall rating format, the related review definition must be in a Draft or Inactive status. If in an active mode, the Edit link will be not available.

Configuration > **[Taleo Performance] Administration** > **[Performance Reviews] Review Definitions**

1. In the **Review Definition Management** page, click the name of the review definition for which you want to define the rating format.
2. In the **Review Definition** page, do one of the following:
   - If you want to define the rating format for the review summary, click **Edit** next to the **Settings** header.
   - If you want to define the rating format of the sections' summary, click the name of the related section under **Review Sections** and then click **Edit** next to the **Global Settings** header.
3. In the **Review Definition Editor** (under **Overall Rating Settings**) or in the **Review Section Editor** page (under **Global Settings**), select the desired settings as per how you want the overall rating to show on the summary page of the review form or of the review section. The available settings are:
   - **Show Overall Rating**
   - **Show Overall Rating Value**
   - **Show Overall Rating as Numerical Value**
4. Click **Save**.

The defined format will be applied to performance reviews when next generated.

Target Ratings Showing In Performance Reviews

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.

Duplicating a Review Definition

Duplicating a review definition is used to quickly create a new review definition based on an existing one.

Any type of review definition can be duplicated.

Configuration > **[Taleo Performance] Administration** > **[Performance Reviews] Review Definitions**

1. In the **Review Definition Management** page, locate the review definition to be duplicated.
2. Click **Duplicate** under **Actions**.

The duplicated review definition displays in the list of review definitions with an automatically-generated number preceding the original code and shows a Draft status.

The duplicated review definition can then be edited as needed and activated.

Editing a Review Definition

Editing a review definition is done to modify a review definition' properties, settings and/or components.

Editing of any information is possible only when the review definition is in a Draft or Inactive status. Therefore, if the definition is active, its deactivation will be required beforehand and only possible if not already in use in an active review request.

Configuration > **[Taleo Performance] Administration** > **[Performance Reviews] Review Definitions**

1. In the **Review Definition Management** page, click the name of the review definition to be edited.
2. In the **Review Definition** page, make sure the status of the review definition to be edited is Draft or Inactive for the edition to be allowed.

   No display of the **Edit** link indicates that the status of the review definition is Active and therefore not editable. Furthermore, deactivation will only be allowed if the review definition is not attached to an active review request.
3. In the same **Review Definition** page, click the **Edit** link corresponding to the section where information is to be modified.
4. In the **Review Definition Editor** page, make the desired changes.
5. Click **Save**.

The edited information is automatically applied and displayed in the **Review Definition Management** page of the selected definition.

The edited review definition must be reactivated to be available for selection.

Activating a Review Definition

Activating a review definition is used to change the status of a review definition from Draft or Inactive to Active. Only active definitions can be selected and used in review request groups.

To activate a review definition, its status must be Draft or Inactive.

Configuration > **[Taleo Performance] Administration** > **[Performance Reviews] Review Definitions**

1. In the **Review Definition Management** page, locate the review definition to be activated.
2. Click **Activate** under **Actions**.

The activated review definition shows an Active status.

The activated review definition can then be used and selected in review request groups.

Deactivating a Review Definition

Deactivating a review definition is done to change the status of a review definition from Active to Inactive. Deactivation is required to edit a review definition. It is important to note that inactive review definitions cannot be used or assigned.

To deactivate a review definition, its status must be Active and it CANNOT be associated to an active review request.

Configuration > **[Taleo Performance] Administration** > **[Performance Reviews] Review Definitions**

1. In the **Review Definition Management** page, locate the review definition to be deactivated.

   For the **Deactivate** button to be available under **Actions**, the review definition must be in an Active status and not be associated to any review request.
2. Click **Deactivate** under **Actions**.

The selected review definition shows an Inactive status.

To be able to use again a deactivated review definition, it must be reactivated.

Deleting a Review Definition

Deleting a review definition is done to remove a review definition from the list of existing definitions.

To delete a review definition, its status can only be Draft. Therefore, a review definition that has been activated cannot be deleted, even if deactivated.

Configuration > **[Taleo Performance] Administration** > **[Performance Reviews] Review Definitions**

1. In the **Review Definition Management** page, locate the review definition to be deleted.

   The **Delete** button will only be available if the definition is in a Draft status.
2. Click **Delete** under **Actions**.

The deleted review definition is removed from the list of review definitions displayed in the **Review Definition Management** page.

Review Definition Fields

Fields displayed in Review Definitions 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
Allow to Override Overall Rating	Setting that indicates permission for the manager and/or the employee to override the calculated overall rating when completing the review. By default, this is disabled. This must be enabled for Calibrator users so they can change the overall rating of the review.	Review Definitions	Settings by Rater
Allow to View History Section	Setting that indicates if the manager, the calibrator and/or the employee is entitled to view the History section of the review form. By default, the manager can view the History, the calibrator always views the History and the employee doesn't.	Review Definitions	Settings by Rater
Allow to Weight Sections	Setting that indicates permission for the manager, the calibrator and/or the employee to weight sections. By default, this setting is not selected for all three rater types.	Review Definitions	Settings by Rater
Calibrator	Column for indicating the calibrator ‘s permissions.	Review Definitions	Settings by Rater
Code	Unique alphanumeric code used to identify an element (review, definition, section, item, cycle, request, text). In a list, the code is usually displayed with the name.	Review Definitions	Properties
Decimal Rounding Threshold (%)	Field used to determine how the calculated average of all item ratings in a section or of all section ratings in a review 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.	Review Definitions	Properties
Definition Type	Type of performance review defined in the review definition. The type used in the Review Definition is only used for reporting purposes. Possible values are:	Review Definitions	Properties

Field	Description	Applicable to	Header
	• **Focal** - A focal review is the most typical type, where all employees are reviewed at the same time. • **Midyear** - A mid-year review serves as documented feedback that the manager gives to the employee for coaching or development purposes. A mid-year review is not an official review in that it is not used for compensation increases or personnel decision-making. Mid-year feedback forms often do not require approval routings or employee self-evaluations. • **Quarterly** - A quarterly review serves as documented feedback that the manager gives to the employee for coaching or development purposes. A quarterly review is not an official review in that it is not used for compensation increases and personnel decision-making. Quarterly feedback forms often do not require approval routings or employee self-evaluations. • **Probationary** - A probationary review is usually done for recently hired employees, often 30, 60, or 90 days after they begin a new job. Typically, probationary reviews are “course corrections”, providing feedback to the employee on his/her initial performance. This type of review can also be used to justify terminations. • **Performance Improvement Plan** - Performance Improvement Plans (PIPs) are generated for employees whose performance falls to an unacceptable level. A PIP is used to document the required level of performance the employee must achieve to maintain employment. PIPs are generally active for a short period of time (e.g. 60 days) and contain goals with ratings similar to a performance review.		

Field	Description	Applicable to	Header
	Additionally, the PIP business process differs from the performance management business process in that a) there is no employee self-evaluation and b) the PIP must be co-authored by the manager and HR before it can be shared with the employee.		
Employee	Column for indicating the employee ‘s permissions.	Review Definitions	Settings by Rater
Instruction	Specifies special instructions to be displayed under the title on the review form or in the section. Data can be entered directly in the editor box or by selecting existing text, depending on the option selected - Enter Review Text or Select Review Text. Only text entered manually can be formatted using the text editor options.	Review Definitions	Properties
Manager	Column for indicating the manager ‘s permissions.	Review Definitions	Settings by Rater
Name	Alphanumeric value used to indicate the name of an element (review, definition, section, item, cycle, request, text). In a list, the name is usually displayed with the code.	Review Definitions	Properties
Number of Decimals	Numeric value from 0 to 5 indicating the number of decimals to display when the rating is presented as a numeric value.	Review Definitions	Properties
Overall Rating Auto-calculated	Setting that indicates whether the overall rating is automatically calculated by the system based on the weights and ratings of sections and items.	Review Definitions	Overall Rating Settings
Overall Rating Calculation Value Type	Setting that indicates which rating value is used to calculate the overall rating, whether it be the review's or the section's overall rating. The overall rating can be based on the raw value, on the rounded value or on the actual rating value of the items or sections.	Review Definitions	Properties
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.	Review Definitions	Settings by Rater

Field	Description	Applicable to	Header
Overall Rating Comment Mandatory	Setting that indicates whether the manager and/or the employee must provide a comment when entering the overall rating. When the overall rating comment is mandatory, the submission or completion of the review form is not allowed if no overall comment is provided. This setting is not valid for the calibrator and not selected by default for the other two rater types.	Review Definitions	Settings by Rater
Overall Rating Mandatory	Setting that indicates whether entering an overall rating is mandatory for the manager and/or the employee. When the overall rating is mandatory, the submission or completion of the review form is not allowed if no overall rating is provided. This setting is not valid for the calibrator and not selected by default for the other two rater types.	Review Definitions	Settings by Rater
Overall Rating Model	Rating model used to indicate the overall rating of a given performance review. A model is selected from the list of predefined rating models.	Review Definitions	Properties
Override Rating Comment Mandatory	Setting that indicates whether the manager has to enter a comment when overriding an overall rating. For this setting to be valid, the Allow Manager to Override Overall Rating must also be activated.	Review Definitions	Overall Rating Settings
Rating Value Selection Intervals	Display field that illustrates the associated rating model values, based on the selected rating model and the number of decimals.	Review Definitions	Properties
Rating Value Selection Threshold (%)	Field used to define how the rounded average mathematically calculated is translated back to a discrete rating value that corresponds to the initial rating model. The corresponding values are shown under the Rating Value Selection Intervals field. For example, 3.4=Good.	Review Definitions	Properties
Rounding Interval Examples	Display field that illustrates a sample result of the selected Decimal Rounding Threshold for one single interval, based on the number of decimals specified.	Review Definitions	Properties
Section used for "Competency Rating" metric	Review section to be used to calculate the Overall Competency	Reviews Definitions	Properties

Field	Description	Applicable to	Header
	Rating that is shown in the Metrics section of the Talent Profile.		
Section used for "Goal Rating" metric	Review section to be used to calculate the Overall Goal Rating that is shown in the Metrics section of the Talent Profile.	Reviews Definitions	Properties
Show Author ID	Setting that indicates whether the ID of the review author is displayed on the review form (in the Overview page of the review, under Current Review.	Review Definitions	Author Settings
Show Author Job Title	Setting that indicates whether the job title of the review author is displayed on the review form (in the Overview page of the review, under Current Review.	Review Definitions	Author Settings
Show Author Name	Setting that indicates whether the name of review author is displayed on the review form (in the Overview page of the review, under Current Review.	Review Definitions	Author Settings
Show Employee Business Unit	Setting that indicates whether the employee's business unit is displayed on the review form (in the Overview page of the review, under Employee Information).	Review Definitions	Employee Settings
Show Employee Department	Setting that indicates whether the employee's department is displayed on the review form (in the Overview page of the review, under Employee Information).	Review Definitions	Employee Settings
Show Employee Job Field	Setting that indicates whether the employee's job field is displayed on the review form (in the Overview page of the review, under Employee Information).	Review Definitions	Employee Settings
Show Employee Job Level	Setting that indicates whether the employee's job level is displayed on the review form (in the Overview page of the review, under Employee Information).	Review Definitions	Employee Settings
Show Employee Job Title	Setting that indicates whether the employee's job title is displayed on the review form (in the Overview page of the review, under Employee Information).	Review Definitions	Employee Settings
Show Employee Name	Setting that indicates whether the employee's name is displayed on the review form (in the Overview page of the review, under Employee Information).	Review Definitions	Employee Settings

Field	Description	Applicable to	Header
Show Employee Number	Setting that indicates whether the employee's number is displayed on the review form (in the Overview page of the review, under Employee Information).	Review Definitions	Employee Settings
Show Employee Organization	Setting that indicates whether the name of the employee's organization is displayed on the review form (in the Overview page of the review, under Employee Information).	Review Definitions	Employee Settings
Show Manager Name	Setting that indicates whether the employee's manager name is displayed on the review form (in the Overview page of the review, under Employee Information).	Review Definitions	Employee Settings
Show Overall Rating	Setting that indicates whether the overall rating of the performance review is displayed on the review form. The overall rating is displayed on the Summary page of the review.	Review Definitions	Overall Rating Settings
Show Overall Rating as Numerical Value	Setting that indicates whether the overall rating of the review, when displayed, is represented as a numeric value or as a text description. This value corresponds to the 2nd element in the rating - [Rating Value Text] [Numerical Value of Rating Value] [Calculated Rating].	Review Definitions	Overall Rating Settings
Show Overall Rating Value	Setting that indicates whether the overall rating value is to be hidden or displayed on the review form summary. This value corresponds to the 3rd element in the rating and indicates the calculated rating - [Rating Value Text] [Numerical Value of Rating Value] [Calculated Rating].	Review Definitions	Overall Rating Settings
Show Review Definition Code	Setting that indicates whether the code of the review definition is displayed on the review form (in the Overview page of the review, under Current Review.	Review Definitions	Settings
Show Review Definition Name	Setting that indicates whether the name of the review definition is displayed on the review form (in the Overview page of the review, under Current Review.	Review Definitions	Settings
Show Review Instructions	Setting that indicates whether the information entered in the Instruction field of the definition/ section/item's properties is displayed on the review form. The	Review Definitions	Settings

Field	Description	Applicable to	Header
	instructions are displayed at the bottom of the Overview page of the review.		
Show Review Request End Date	Setting that indicates whether the end date of the review request is displayed on the review form. This information is displayed in the Overview page, below the review name. When selected along with the Show Review Request Start Date, the date is shown under the From (start date) to (end date) format.	Review Definitions	Settings
Show Review Request Start Date	Setting that indicates whether the start date of the review request is displayed on the review form. This information is displayed in the Overview page, below the review name. When selected along with the Show Review Request End Date, the date is shown under the From (start date) to (end date) format.	Review Definitions	Settings
Show Section Weight	Setting that indicates whether the weight is to be displayed for sections of the review form.	Review Definitions	Settings
Show Summary	Setting that indicates whether a summary page for the review is displayed on the review form. This setting **must** be active for the Show Comment setting and all settings under Overall Rating Settings (review definitions only) to be displayed. Please see these settings as well.	Review Definitions	Settings
Show Summary Comment	Setting that indicates whether a comment field is available on the review form for entering comments about the review. This field is displayed on the Summary page of a review. **Note that for the comment entry box to display, the Show Summary setting **must also** be selected.	Review Definitions	Settings
Show Workflow Graphic	Setting that determines whether the workflow graphic is to be displayed on the review form. This graphic indicates all the steps of the review workflow as well as which steps are completed.	Review Definitions	Settings
Status	Status of the selected element. Possible values are: • **Draft** - When in Draft status, an element can be viewed and edited but not applied or associated with another	Review Definitions	Properties

Field	Description	Applicable to	Header
	element. Before you can use a Draft element, it must first be activated. Once the status of an element has been changed from Draft to another status, it can never have Draft status again. • **Inactive** - When in Inactive status, an element can be edited or deleted but it cannot be applied or associated with another element. Before you can use an Inactive element, it must first be activated. The Inactive status is required before you can delete or edit an element • **Active** - When in Active status, an element cannot be edited or deleted but it can be applied and associated with another element. Before you can edit an active element, it must first be deactivated.		
Summary Instruction	Field used to specify special instructions to be displayed under the title of the summary page of the review form or the section. Data can be entered directly in the editor box or existing text can be selected, depending on the option selected - Enter Review Text or Select Review Text. Only text entered manually can be formatted using the text editor options.	Review Definitions	Properties
Summary Title	Field used to specify the title of the summary page of the review form or the section, which is displayed on the performance review form. Data can be entered directly in the editing box or existing text can be selected, depending on the option selected - Enter Review Text or Select Review Text. Only text entered manually can be formatted using the text editor options.	Review Definitions	Properties
Title	Field used to specify the title of the section or the review form to be displayed on the performance review form. Data can be entered directly in the editor box or existing text can be selected, depending on the option selected - Enter Review Text or Select Review Text. Only text entered manually can be formatted using the text editor options.	Review Definitions	Properties

Working with Review Sections

Review Section

The review section is the part of the review definition where you specify the information that will be used to evaluate an employee's performance. Usually, a performance review form includes more that one section, each section corresponding to a part of the review.

The review section's configuration allows you to define the default text values for the section name and screen instructions, and select the section rating model. You can specify whether the section is comprised of items (for example, in the goals section, the items would be individual goals), whether items are rated, whether items have other items and whether specific fields and capabilities are available for the employee and/or the manager. There are also unique settings based on the section type. For example, for a competency section, you (as an administrator) can select specific competencies to include in reviews.

There are three different types of sections.

- Goal sections - to define the goals to be evaluated in the review.
- Competency section - to define the competencies to be evaluated in the review.
- Custom section - to define items other than goals and competencies to be evaluated in the review.

Viewing a Review Section

Viewing a review section is done from within a review definition to view a specific section.

Configuration > [Taleo Performance] Administration > [Performance Reviews] Review Definitions

1. In the **Review Definition Management** page, click the name of the review definition containing the review section to be viewed.
2. In the **Review Definition** page, click the name of the review section to be viewed.
3. In the **Review Section** page, use the **Show** links to display the related information.

The selected review section information displays in the **Review Section** page.

Creating a Review Section

Creating a review section within the context of a review definition is used to create a new section from scratch for the selected review definition and is automatically done through a wizard that guides you through the entire creation process.

To create a review section, you need to have a review definition in which to include it. Furthermore, the creation of a review section is only allowed if the related review definition is in a draft or inactive status. If the review definition is active, its deactivation will be required beforehand and will only be possible if not already in use in an active review request.

Configuration > **[Taleo Performance] Administration** > **[Performance Reviews] Review Definitions**

1. In the **Review Definition Management** page, click the name of the review definition for which you want to create a new review section.
2. In the **Review Definition** page, click **Create** next to **Review Sections**.
3. In the **Review Section Wizard** page, start by specifying the new section's properties and click Next.
4. In the **Section Rating Model** page, specify if section and item rating models are required and if applicable, select the desired models. Click **Next**.
5. In the **Global Settings** page, indicate the information to be displayed on the review form and what is mandatory by checking the appropriate settings. Click **Next**.
6. In the **Settings by Rater** page, indicate the tasks that can perform the manager, the employee and/or the calibrator when displaying the review. Click **Next**.
7. In the **Summary** page, review all the information provided and go back to the previous pages to make changes as needed by clicking on **Previous**.
8. Once all information is as desired, click **Finish** to complete and save the review section.

Once created, the new review section displays in the list of review sections of the related **Review Definition** page.

Duplicating a Review Section

Duplicating a review section within a review definition is used to quickly create a new review section based on an existing one.

A review section can be duplicated whatever the status of the review definition is (Draft, Active or Inactive).

Configuration > **[Taleo Performance] Administration** > **[Performance Reviews] Review Definitions**

1. In the **Review Definition Management** page, select the review definition containing the review section to be duplicated.
2. In the **Review Definition** page, locate the review section to be duplicated.
3. Click **Duplicate** under **Actions**.

The duplicated review section displays in the **Review Definition** page, in the list of review sections, with an automatically-generated number preceding the original code. Furthermore, the weight of all sections is automatically adjusted if the option to equally distribute the rating is selected.

The duplicated review section can then be edited as needed.

Adding a Review Section

Adding a review section in a review definition consists in adding a review section template, which has been created as a model.

To add a review section, you need to have a review definition to include it in as well as an active review section template to select. Furthermore, the addition of a review section is only allowed if the related review definition is in a draft or inactive status. If the review definition is active, its deactivation will be required beforehand and will only be possible if not already in use in an active review request.

Configuration > **[Taleo Performance] Administration** > **[Performance Reviews] Review Definitions**

1. In the **Review Definition Management** page, click the name of the review definition in which you want to add a review section.

2. In the **Review Definition** page, click **Add** next to **Review Sections**.
3. In the **Review Section Selector** page, select the review sections to add from the list of available review section templates by placing a checkmark in the relevant boxes and click **Select**.

The added review section template displays in the list of review sections of the relevant **Review Definition** page.

The newly added review section template is then ready to be edited if needed.

Editing a Review Section

Editing a review section is used to modify a review section's properties, applicable rating models and/or settings.

Editing any review section information is possible only when the related review definition is in a Draft or Inactive status. If the review definition is active, its deactivation will be required beforehand and will only be possible if not attached to an active review request.

Configuration > **[Taleo Performance] Administration** > **[Performance Reviews] Review Definitions**

1. In the **Review Definition Management** page, click the name of the review definition that contains the review section to be edited.
2. In the **Review Definition** page, click the name of the review section to be edited.
3. In the **Review Section** page, click Edit next to the section where information is to be modified.
4. In the **Review Section Editor** page, make the desired changes.
5. Click **Save**.

The edited information is automatically applied and displayed in the review section of the selected review definition.

Editing the Weight of a Review Section

Editing the weight of a review section is done to modify the weight value of a section within a definition when the overall rating is not equally distributed or to exclude or include a section in the overall rating calculation.

To edit the weight, you need to have at least one section in the review definition.

Configuration > **[Taleo Performance] Administration** > **[Performance Reviews] Review Definitions**

1. In the **Review Definition Management** page, click the name of the review definition for which you want to edit the weight of the review sections.
2. In the **Review Definition** page, click **Edit** next to **Review Sections**.
3. In the **Review Section Weight Editor** page, specify which section is to be included in the overall score by checking or clearing the **Exclude From Overall Rating** option.
4. Again, in the Review Section Weight Editor page, do one of the following:
   - If you want all included sections to have the same weight in the calculation of the overall rating, check the **Weight Equally Distributed** option. In this situation, there is not need to enter a specific weight for each section as it will be automatically calculated and evenly distributed.
   - If you do not want all included sections to have the same weight in the calculation of the overall rating, do not check the **Weight Equally Distributed** option and enter the desired weight for each included section.
5. Click **Save** to complete and save the edited information.

The edited weight and rating information display under Review Sections in the relevant Review Definition page.

Creating a UDF for a Custom Review Section

Creating a user-defined field for a custom review section is required to be able to add the field in a review definition's custom section.

Configuration > [Taleo Performance] Administration > [Performance Reviews] User-defined Fields

1. In the **Review Section Item (Custom)** page, click **Create** next to **User-Defined Fields**.
2. In the **New User-Defined Field** page, specify the code and name of the field to be created as well as the type of data to be entered in the field.

   Note that once created and saved, only the name can be edited.

   Also, if more that one language has been configured, a name will be required for each language before saving is allowed.
3. Click **Save**.

The new field displays in the list of **User-Defined Fields**.

Once created, the user-defined field is available for selection as a custom field in custom review sections.

Creating a User-Defined Selection List

Creating a user-defined selection list allows system administrators to create additional selection lists having a set of user-defined values (or elements.) The selection list may be later used to define a user-defined field. This functionality can be used in performance reviews, goals plans, development plans or in the employee management section of the Talent Profile.

Configuration > [Performance] Administration > [Global Configurations] User-defined Selections

Configuration > [Performance] Selection Lists

1. In the User-Defined Selections page, click Create next to Selections.
2. In the New User-Defined Selection page, specify the properties for the new selection.
3. Click Save.
4. In User-Defined Selection page, click Create next to Elements to define the elements of the list.
5. In the New Element page, specify the properties of the new element.
6. Repeat steps 4 and 5 for each element composing the selection list.

The new selection list name displays and is available for use in the list of domain fields when creating user-defined fields.

Once the properties are created, you must activate at least one value (element) to then activate the selection for the newly created selection list to be available as a user-defined field to be added in custom sections of performance reviews, goal plans, development plans and the employee management section of the Talent Profile.

Adding a Custom Field to a Review Section

Adding a custom field to a review section allows to select user-defined data to be inserted in the custom sections of performance reviews.

To add a custom field to a review section, the type of the review section MUST be Custom. Furthermore, addition is only possible if the related review definition is in a Draft or Inactive status.

Configuration > [Taleo Performance] Administration > [Performance Reviews] Review Definitions

1. In the Review Definition Management page, click the name of the review definition that contains the custom review section to which you want to add a custom field.
2. In the Review Definition page, click the name of the custom review section to contain the new custom field.
3. In the Review Section page, click Add next to Custom Fields.
4. In the Custom Field Editor page, select the desired custom fields to be added from the list of available custom fields.
5. Click Select.
6. Once added, you have the possibility of specifying some other information, depending on the type of the field.

   It is not recommended however to change the Editable status of a field to be used in a review as, in such a case, no information would be allowed to be entered in relation to the displayed field name.
7. If the newly added custom field is a Text or Multilingual Text type field, you will also need to specify how the text will be inserted, as a text input or in a text area. If in a text area, the number of lines in the area will need to be indicated as well.
8. Click Save.

The added custom fields display under Custom Fields in the Review Section page.

If more than one custom field, you can reorder them as desired.

Reodering Review Sections

Reordering of review sections is used to place the review sections in a specific order on the review form.

The review sections can be reordered at any time, whether they are included or not in the overall rating.

Configuration > [Taleo Performance] Administration > [Performance Reviews] Review Definitions

1. In the Review Definition Management page, select the review definition for which review sections are to be reordered.
2. In the Review Definition Management page of the selected review definition, besides Review Sections, click Reorder.
3. In the Reorder Review Sections page, highlight a section and use the Up and Down arrows to move the section to the desired location.
4. Once all sections are in the desired order, click Save.

The review sections presented under Review Sections display in the list according to the defined order.

Deleting a Review Section

Deleting a review section is done to remove a section from the list of review sections within a review definition.

To delete a review section from within a review definition, the status of the related review definition MUST be Draft or Inactive. If the related review definition is active, its deactivation will be required beforehand and will only be possible if not attached to an active review request.

Configuration > [Taleo Performance] Administration > [Performance Reviews] Review Definitions

1. In the Review Definition Management page, select the review definition that contains the review section to be deleted.
2. In the Review Definition page, locate the review section to be deleted.

   The Delete button will only be available under Actions if the related review definition is in a Draft of Inactive status.

3. If deletion is possible, click Delete under Actions.

The deleted review section no longer displays in the list of review sections in the Review Definition page.

Review Section Fields

Fields displayed in Review Sections and Review Section Templates are presented in the following table. Each entry in the table includes a field, a description, possible values (when they are predefined), the part of the application to which the field applies, and the header of the field.

Field	Description	Applicable to	Section Header
Actual Value	Field that determines if the actual value of goals is displayed and editable when included in a performance review.	Review Sections with Goal type only	Standard Fields
Aligned Employee Goal	Field that determines if the alignment indicator of goals is displayed and editable when included in a performance review.	Review Sections with Goal type only	Standard Fields
Allow "Not Applicable" As Item Rating	Setting that indicates permission for the manager, the calibrator and/or the employee to mark an item as "Not Applicable". Note that "Not Applicable" items are neither weighted nor part of the section or overall rating calculation. By default, this setting is selected for all three rater types.	Review Sections	**Settings by Rater**
Allow to Add Items	Setting that indicates permission for the manager, the calibrator and/or the employee to add items to the section. By default, the setting is not selected for all	Review Sections	**Settings by Rater**

Field	Description	Applicable to	Section Header
	three rater types. When selected, the **Allow to Edit General Information** and **Allow to Edit Goal Information** (for goal sections) settings are by default selected.		
Allow to Comment Items	Setting that indicates permission for the manager, the calibrator and/or the employee to enter item-related comments in the section. For this setting to be functional, the Show Comment setting at the section level **must** also be selected. By default, the setting is selected for all three rater types.	Review Sections	**Settings by Rater**
Allow to Comment Sections	Setting that indicates permission for the manager, the calibrator and/or the employee to enter section-related comments on the Summary page. For this setting to be functional, the Show Comment setting at the section level **must** also be selected. By default, the setting is selected for all three rater types.	Review Sections	**Settings by Rater**
Allow to Edit Additional Information	Setting that applies only to custom sections and that indicates permission for the manager, the calibrator and/or the employee to edit custom section items.	Review Sections	**Settings by Rater**
Allow to Edit General Information	Setting that applies to all goal, competency and custom sections and that indicates permission for the manager, the calibrator and/or the employee to edit general information about items in the section, that being the name and description of the goal, competency or custom item. By default, the setting is not selected for all three rater types.	Review Sections	**Settings by Rater**
Allow to Edit Goal Information	Setting that applies only to goal sections and that indicates permission for the manager, the calibrator and/or the employee to edit the goal status, start date, due date and percentage complete.	Review Sections	**Settings by Rater**
Allow to Override Calculated Section Ratings	Setting that indicates permission for the manager, the calibrator and/or the employee to override the rating automatically calculated and based on the ratings of items in the section. For this setting to be functional, the Overall Rating Auto-Calculated option of the related review definition **must** also be selected. By default, the setting	Review Sections	**Settings by Rater**

Field	Description	Applicable to	Section Header
	is not selected for all three rater types.		
Allow to Rate Items	Setting that indicates permission for the manager, the calibrator and/or the employee to rate items in the section. By default, the setting is selected for all three rater types.	Review Sections	**Settings by Rater**
Allow to Remove Items	Setting that indicates permission for the manager, the calibrator and/or the employee to remove items in the section. By default, the setting is not selected for all three rater types.	Review Sections	**Settings by Rater**
Allow to Weight Items	Setting that indicates permission for the manager, the calibrator and/or the employee to weight items in the section. By default, the setting is not selected for all three rater types.	Review Sections	**Settings by Rater**
Auto-Populate Goals from Employee Goal Plan	Setting that indicates if goals shown on the review are drawn from the employee's goal plan. If this option is selected, goals with a due date within the range of the review period are auto-populated in the review.	Review Sections with Goal type only	Goal Settings
Calibrator	Column for indicating the calibrator ‘s permissions.	Review Sections	**Settings by Rater**
Code	Unique alphanumeric code used to identify an element (review, definition, section, item, cycle, request, text). In a list, the code is usually displayed with the name.	**Review Sections**	Properties
Comment Label	Field used to specify the text to be displayed as the comment label on the review form for the related section. It is possible to either select the default label, select an existing label from the review text library or to enter directly any other desired label in the entry box. The available options are: «Comment», Select Review Text or Enter Review Text. In edit mode, the Enter Review Text option is not available.	Review Sections	Properties
Comments	Field that determines if comments provided about goals are displayed and editable when goals are included in a performance review.	Review Sections with Goal type only	Standard Fields
Critical	Field that determines if the critical indicator of goals is displayed	Review Sections with Goal type only	Standard Fields

Field	Description	Applicable to	Section Header
	and editable when included in a performance review.		
Decimal Rounding Threshold (%)	Field used to determine how the calculated average of all item ratings in a section and how the calculated average of all section ratings in a review 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.	Review Sections	Rating Models
Description	Field that determines if the description of goals is displayed and editable when included in a performance review.	Review Sections with Goal type only	Standard Fields
Due Date	Field that determines if the end date of goals is displayed and editable when included in a performance review.	Review Sections with Goal type only	Standard Fields
Employee	Column for indicating the employee 's permissions.	Review Sections	**Settings by Rater**
Exclude from Overall Rating	Check box option that indicates if the section or item is excluded from (not used in calculating) the overall rating. When exclude the corresponding weight is set to 0.	Review Sections	Section Items
Include Competencies from Job Profile Classification	Check box option that indicates that the corresponding performance reviews will be automatically populated with competencies included in the job profile classification.	Section Items of Competency section only	Section Items
Include Competencies from Job Role	Check box option that indicates that the corresponding performance reviews will be automatically populated with competencies included in the employee's job role.	Section Items of Competency section only	Section Items
Instruction	Field used to specify special instructions to be displayed under the title on the review form or the section. Data can be entered directly in the editor box or existing text can be selected, depending on the option selected - Select Review Text or Enter Review Text. Only text entered manually can be formatted using the text editor options.	Review Sections	Properties
Item Comment Mandatory	Setting that indicates whether it is mandatory for the manager and/or the employee to enter a comment for the item. This setting is not valid for the calibrator and not	Review Sections	**Settings by Rater**

Field	Description	Applicable to	Section Header
	selected by default for the other two rater types.		
Item Rating Control Type	Setting that identify the type of control used to rate items in the review section. Possible values are: • Drop-down menu - to present all rating options in a drop-down box where the rating can be selected. Suggested for 2 to 10 rating options. • Rating bar - to provide the ability for the user to select a rating along a visual continuum. Suggestion for text-based options or more than 10 options. • Toggle - to offer a binary rating option, for example, Yes/No	Review Section	Rating Models
Item Rating Mandatory	Setting that indicates whether it is mandatory for the manager, the calibrator and/or the employee to enter a rating for the item. This setting is not valid for the calibrator and not selected by default for the other two rater types.	Review Sections	**Settings by Rater**
Item Rating Model	Rating model used to rate items. The selection is made from a list of predefined rating models.	Review Sections	Rating Models
Manager	Column for indicating the manager ‘s permissions.	Review Sections	Settings by Rater
Measurement Text	Field that determines if the measurement text of goals is displayed and editable when included in a performance review.	Review Sections with Goal type only	Standard Fields
Measurement Type	Field that determines if the measurement type of goals is displayed and editable when included in a performance review.	Review Sections with Goal type only	Standard Fields
Name	Alphanumeric value used to indicate the name of an element (review, definition, section, item, cycle, request, text). In a list, the name is usually displayed with the code.	Review Sections	Properties
Name	Field that determines if the name of goals is displayed and editable when included in a performance review.	Review Sections with Goal type only	Standard Fields
Number of Decimals	Numeric value from 0 to 5 indicating the number of decimals	Review Sections	Rating Models

Field	Description	Applicable to	Section Header
	to display when the rating is presented as a numeric value.		
Override Section Rating Comment Mandatory	Setting that indicates if it is mandatory for the manager to provide a comment when overriding the auto-calculated overall rating.	Review Sections	Global Settings
Progress	Field that determines if the progress of goals is displayed and editable when included in a performance review.	Review Sections with Goal type only	Standard Fields
Rating Label	Field used to specify the text to be displayed as the rating label on the review form for the related section. It is possible to either select the default label, select an existing label from the review text library or to enter directly any other desired label in the entry box. The available options are: «Rating», Select Review Text or Enter Review Text. In edit more, the Enter Review Text option is not available.	Review Sections	Properties
Rating Value Selection Intervals	Display field that illustrates the associated rating model values according to the number of decimals.	Review Sections	Rating Models
Rating Value Selection Threshold (%)	Field used to define how the rounded average mathematically calculated is translated back to a discrete rating value that corresponds to the initial rating model. The corresponding values are shown under the Rating Value Selection Intervals field.	Review Sections	Rating Models
Rounding Interval Examples	Display field that illustrate a sample result of the selected Decimal Rounding Threshold for one single interval, according to the number of decimals specified.	Review Sections	Rating Models
Section Comment Mandatory	Setting that indicates whether it is mandatory for the manager, the calibrator and/or the employee to enter a comment for the section. This setting is not valid for the calibrator and not selected by default for the other two rater types.	Review Sections	**Settings by Rater**
Section Rating Mandatory	Setting that indicates whether it is mandatory for the manager, the calibrator and/or the employee to enter a rating for the section. This setting is not valid for the calibrator and not selected by default for the other two rater types.	Review Sections	**Settings by Rater**

Field	Description	Applicable to	Section Header
Section Rating Model	Rating model used for evaluating this section, selected from a list of predefined values.	Review Sections	Rating Models
Show Item Comment	Setting that indicates if a comment box for each item in the section is available on the review.	Review Sections	Item Settings
Show Item Description	Setting that indicates if the description of items is displayed for the review section. The description shows under the item title on the review form.	Review Sections	Item Settings
Show Item Rating	Check box option that indicates if the review displays item level ratings for the review section.	Review Sections	Rating Models
Show Item Rating As Numerical Value	Setting that indicates whether the rating of the item, when displayed, is represented as a numeric value or as a text description. This value corresponds to the 2nd element in the rating - [Rating Value Text] [Numerical Value of Rating Value] [Calculated Rating].	Review Sections	Item Settings
Show Item Rating Value	Setting that indicates whether the rating value is to be displayed as part of the item rating. This value corresponds to the 3rd element in the rating and indicates the calculated rating - [Rating Value Text] [Numerical Value of Rating Value] [Calculated Rating].	Review Sections	Item Settings
Show Item Title	Setting that indicates if the title of items is displayed for the review section.	Review Sections	Item Settings
Show Item Weight	Setting that indicates if the weight of items is displayed for the review section.	Review Sections	Item Settings
Show Section Comment	Setting that indicates whether a comment field is available on review sections for entering comments about the section. This field is displayed on the Summary page of a section. **Note that for the comment entry box to display, the Show Section Summary setting **must also** be selected.	Review Sections	Global Settings
Show Section Overall Rating	Setting that indicates whether the overall rating is to be displayed for review sections. The overall rating is displayed on the Summary page of all review sections.	Review Sections	Global Settings
Show Section Overall Rating as Numerical Value	Setting that indicates whether the overall rating of the section,	Review Sections	Global Settings

Field	Description	Applicable to	Section Header
	when displayed, is represented as a numeric value or as a text description. This value corresponds to the 2nd element in the rating - [Rating Value Text] [Numerical Value of Rating Value] [Calculated Rating].		
Show Section Overall Rating Value	Setting that indicates whether the overall rating value is to be displayed on review section summaries. This value corresponds to the 3rd element in the rating and indicates the calculated rating - [Rating Value Text] [Numerical Value of Rating Value] [Calculated Rating].	Review Sections	Global Settings
Show Section Summary	Setting that indicates if a summary is displayed for the review section. This setting **must** be active for the Show Comment setting to be valid.	Review Sections	Global Settings
Show Sub-item	Setting that indicates if sub-competencies are displayed on the review form (when applicable). When this setting is **not** selected, **no other** sub-item settings are valid.	Review Sections with Competency type only	Sub-item Settings
Show Sub-item Comment	Setting that indicates if a comment box is displayed for each sub-competency. For this setting to be valid, the Show Sub-item setting **must** be checked.	Review Sections with Competency type only	Sub-item Settings
Show Sub-item Title	Setting that indicates if the title of the sub-competency is displayed on the review section. For this setting to be valid, the Show Sub-item setting **must** be checked.	Review Sections with Competency type only	Sub-item Settings
Show Target Rating	Setting that indicates if target ratings are displayed for competencies, when those competencies are automatically imported in the review from the employee's job role or related job profile classification.	Review Sections	Item Settings
Start Date	Field that determines if the start date of goals is displayed and editable when included in a performance review.	Review Sections with Goal type only	Standard Fields
Status	Field that determines if the status of goals is displayed and editable when included in a performance review.	Review Sections with Goal type only	Standard Fields
Stretch Value	Field that determines if the stretch value of goals is displayed and	Review Sections with Goal type only	Standard Fields

Field	Description	Applicable to	Section Header
	editable when included in a performance review.		
Summary Instruction	Field used to specify special instructions to be displayed under the title of the Summary page of the review form or the section. Data entry can be done directly in the editor box or existing text can be selected, depending on the option selected - Select Review Text or Enter Review Text. Only text entered manually can be formatted using the text editor options.	Review Sections	Properties
Summary Title	Field used to specify the title of the Summary page of the review form or the section, which is displayed on the performance review form. Data can be entered directly in the editing box or existing text can be selected, depending on the option selected - Select Review Text or Enter Review Text. Only text entered manually can be formatted using the text editor options.	Review Sections	Properties
Target Value	Field that determines if the target value of goals is displayed and editable when included in a performance review.	Review Sections with Goal type only	Standard Fields
Task Weight	Field that determines if the weight of tasks is displayed and editable when goals are included in a performance review.	Review Sections with Goal type only	Standard Fields
Tasks	Field that determines if tasks related to goals are displayed and editable when included in a performance review.	Review Sections with Goal type only	Standard Fields
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.	Review Sections	Settings by Rater
Title	Field used to specify the title of the section or the review form displayed on the performance review form. Data can be entered directly in the editing box or existing text can be selected, depending on the option selected - Select Review Text or Enter Review Text. Only text entered manually can be formatted using the text editor options.	Review Sections	Properties

Field	Description	Applicable to	Section Header
Type (of section)	Type of performance review section, selected from predefined types. Possible values are: • **Goal** - Indicates a section related to employee goals. • **Competency** - Indicates a section related to competencies. • **Competency Goal** - Indicates a section related to competency goals. • **Custom** - Indicates a customized section, to be defined by the user.	Review Sections	Properties
User-defined Fields	Section used to define if the user-defined fields used to provide goal information are to be displayed and editable when goals are included in a performance review.	Review Sections	User-defined Fields
Weight	Value that indicates how much a section counts towards the overall rating of a performance review. **Note: Since weights are **not** percentage values, the total weighting does not have to equal 100.	Review Sections	Section Items
Weight Equally Distributed	Check box option that indicates if the weight of each section included in the overall rating is equal distributed.	Review Sections	Section Items

Working with Review Section Templates

Review Section Template

A review section template is a review section model that can be used when adding review sections to a review definition. You use templates to create new sections from existing ones rather than from scratch.

You create review section templates in a manner similar to creating review sections in definitions. You can define the default section template name, instructions, and template section rating model. You can specify whether it is composed of items (for example, in the goals section, the items would be individual goals), whether items are to be rated and whether specific fields and capabilities are available for the employee and/or manager. The various settings available are dependent on the type of section. For example, for a competency-type section, you can select specific competencies to include in the reviews.

Note that once a template has been added to a review definition, it is only associated with that definition. Consequently, any changes made to the template afterward will not be reflected in the review definitions that already include the template. However, if the modified template is added again to a review definition, the changes will be incorporated.

Viewing a Review Section Template

Viewing a review section template allows to display the information related to a specific review section template.

Configuration > **[Taleo Performance] Administration** > **[Performance Reviews] Review Section Templates**

1. In the Review Section Template Management page, click the name of the review section template to be viewed.
2. In the Review Section page, use the Show links to display all related information.

The selected review section template information displays in the Review Section page.

Creating a Review Section Template

Creating a review section template is used to create review sections that will serve as models for review sections to be included in a review definition. Review section templates can be added to a review definition and modified as needed for a specific definition, thus avoiding re-entering the same information twice. The creation of a review section template is automatically done through a wizard that guides you through the entire creation process.

Configuration > **[Taleo Performance] Administration** > **[Performance Reviews] Review Section Templates**

1. In the Review Section Template Management page, click Create next to Review Section Templates.
2. In the Review Section Wizard page, start by specifying the new section template's properties and click Next.
3. In the Section Rating Model page, specify if section and item rating models are required and if applicable, select the desired models. Click Next.
4. In the Global Settings page, indicate the information to be displayed on the review form and what is mandatory by checking the appropriate settings. Click Next.
5. In the Settings by Rater page, indicate the manager's and the employee's permission when displaying the review. Click Next.
6. In the Summary page, review all the information provided and go back to the previous pages to make changes as needed by clicking on Previous.
7. Once all information is as desired, click Finish to complete and save the review section.

Once created, the name of the new review section template displays in the title of the Review Section page and shows a Draft status.

To be able to select and add a review section template in a review definition, the template must be activated.

Duplicating a Review Section Template

Duplicating a review section template is used to quickly create a new review section template from an existing one.

To be able to duplicate a review section template, you need at least an existing one to copy from.

Configuration > **[Taleo Performance] Administration** > **[Performance Reviews] Review Section Templates**

1. In the Review Section Template Management page, locate the review section template to be duplicated.
2. Click Duplicate under Actions.

The duplicated review section template displays in the list of review section templates with an automatically-generated number preceding the original code and a Draft status.

The duplicated review section template can then be edited as needed and activated, to be available for selection.

Editing a Review Section Template

Editing a review section template is used to modify a review section template's properties, applicable rating models and/or settings.

Editing any section template information is possible at any time. Note that when a template is modified, the changes are only be applied to the template itself.

Configuration > **[Taleo Performance] Administration** > **[Performance Reviews] Review Section Templates**

1. In the Review Section Template Management page, click the name of the review section template to be edited.
2. In the Review Section page, click Edit next to the section where information is to be modified.

   To view the information beforehand, click Show.
3. In the Review Section Editor page, make the desired changes.
4. Click Save.

The edited information is automatically applied and displayed in the review section template. Note that if the template was already added to a definition, the changes will not be reflected in the definition as once a template is added to a definition, it becomes part of the definition only. The changes made to the template will only apply the next time it is added to a definition.

Activating a Review Section Template

Activating a review section template is used to change the status of a review section template from Draft or Inactive to Active and is necessary for the templates to be added and used in review definitions.

To activate a review section template, its status must be Draft or Inactive.

Configuration > **[Taleo Performance] Administration** > **[Performance Reviews] Review Section Templates**

1. In the Review Section Template Management page, locate the review section template to be activated.
2. Click Activate under Actions.

The activated review section template shows an Active status. Active review section templates display in the list of available review section templates when added to review definitions.

Deactivating a Review Section Template

Deactivating a review section template is used to change the status of a review section template from Active to Inactive, therefore making the template unavailable for selection when adding a review section in a review definition.

To deactivate a review section template, its status must be Active.

Configuration > **[Taleo Performance] Administration** > **[Performance Reviews] Review Section Templates**

1. In the Review Section Template Management page, locate the review section template to be deactivated.

   For the Deactivate button to be available, the review section template must be in an Active status.
2. Click Deactivate under Actions.

The deactivated review section template shows an Inactive status.

Inactive review section templates cannot be used and MUST be activated again to be available for selection.

Deleting a Review Section Template

Deleting a review section template is done to remove a template from the list of existing templates.

To delete a review section template, its status can only be Draft or Inactive.

Configuration > **[Taleo Performance] Administration** > **[Performance Reviews] Review Section Templates**

1. In the Review Section Template Management page, click the name of the review section template to be deleted.

   Note that the Delete button is only available under Actions if the template is in a Draft status. If inactive, the deletion will need to be done from the Review Section page..
2. Click Delete.

The deleted review section template no longer displays in the list of review section templates.

Review Section Fields

Fields displayed in Review Sections and Review Section Templates are presented in the following table. Each entry in the table includes a field, a description, possible values (when they are predefined), the part of the application to which the field applies, and the header of the field.

Field	Description	Applicable to	Section Header
Actual Value	Field that determines if the actual value of goals is displayed and editable when included in a performance review.	Review Sections with Goal type only	Standard Fields
Aligned Employee Goal	Field that determines if the alignment indicator of goals is	Review Sections with Goal type only	Standard Fields

Field	Description	Applicable to	Section Header
	displayed and editable when included in a performance review.		
Allow "Not Applicable" As Item Rating	Setting that indicates permission for the manager, the calibrator and/or the employee to mark an item as "Not Applicable". Note that "Not Applicable" items are neither weighted nor part of the section or overall rating calculation. By default, this setting is selected for all three rater types.	Review Sections	**Settings by Rater**
Allow to Add Items	Setting that indicates permission for the manager, the calibrator and/or the employee to add items to the section. By default, the setting is not selected for all three rater types. When selected, the **Allow to Edit General Information** and **Allow to Edit Goal Information** (for goal sections) settings are by default selected.	Review Sections	**Settings by Rater**
Allow to Comment Items	Setting that indicates permission for the manager, the calibrator and/or the employee to enter item-related comments in the section. For this setting to be functional, the Show Comment setting at the section level **must** also be selected. By default, the setting is selected for all three rater types.	Review Sections	**Settings by Rater**
Allow to Comment Sections	Setting that indicates permission for the manager, the calibrator and/or the employee to enter section-related comments on the Summary page. For this setting to be functional, the Show Comment setting at the section level **must** also be selected. By default, the setting is selected for all three rater types.	Review Sections	**Settings by Rater**
Allow to Edit Additional Information	Setting that applies only to custom sections and that indicates permission for the manager, the calibrator and/or the employee to edit custom section items.	Review Sections	**Settings by Rater**
Allow to Edit General Information	Setting that applies to all goal, competency and custom sections and that indicates permission for the manager, the calibrator and/or the employee to edit general information about items in the section, that being the name and description of the goal, competency or custom item. By default, the setting is not selected for all three rater types.	Review Sections	**Settings by Rater**

Field	Description	Applicable to	Section Header
Allow to Edit Goal Information	Setting that applies only to goal sections and that indicates permission for the manager, the calibrator and/or the employee to edit the goal status, start date, due date and percentage complete.	Review Sections	**Settings by Rater**
Allow to Override Calculated Section Ratings	Setting that indicates permission for the manager, the calibrator and/or the employee to override the rating automatically calculated and based on the ratings of items in the section. For this setting to be functional, the Overall Rating Auto-Calculated option of the related review definition **must** also be selected. By default, the setting is not selected for all three rater types.	Review Sections	**Settings by Rater**
Allow to Rate Items	Setting that indicates permission for the manager, the calibrator and/or the employee to rate items in the section. By default, the setting is selected for all three rater types.	Review Sections	**Settings by Rater**
Allow to Remove Items	Setting that indicates permission for the manager, the calibrator and/or the employee to remove items in the section. By default, the setting is not selected for all three rater types.	Review Sections	**Settings by Rater**
Allow to Weight Items	Setting that indicates permission for the manager, the calibrator and/or the employee to weight items in the section. By default, the setting is not selected for all three rater types.	Review Sections	**Settings by Rater**
Auto-Populate Goals from Employee Goal Plan	Setting that indicates if goals shown on the review are drawn from the employee's goal plan. If this option is selected, goals with a due date within the range of the review period are auto-populated in the review.	Review Sections with Goal type only	Goal Settings
Calibrator	Column for indicating the calibrator ‘s permissions.	Review Sections	**Settings by Rater**
Code	Unique alphanumeric code used to identify an element (review, definition, section, item, cycle, request, text). In a list, the code is usually displayed with the name.	**Review Sections**	Properties
Comment Label	Field used to specify the text to be displayed as the comment label on the review form for the related section. It is possible to either select the default label, select an	Review Sections	Properties

Field	Description	Applicable to	Section Header
	existing label from the review text library or to enter directly any other desired label in the entry box. The available options are: «Comment», Select Review Text or Enter Review Text. In edit mode, the Enter Review Text option is not available.		
Comments	Field that determines if comments provided about goals are displayed and editable when goals are included in a performance review.	Review Sections with Goal type only	Standard Fields
Critical	Field that determines if the critical indicator of goals is displayed and editable when included in a performance review.	Review Sections with Goal type only	Standard Fields
Decimal Rounding Threshold (%)	Field used to determine how the calculated average of all item ratings in a section and how the calculated average of all section ratings in a review 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.	Review Sections	Rating Models
Description	Field that determines if the description of goals is displayed and editable when included in a performance review.	Review Sections with Goal type only	Standard Fields
Due Date	Field that determines if the end date of goals is displayed and editable when included in a performance review.	Review Sections with Goal type only	Standard Fields
Employee	Column for indicating the employee ‘s permissions.	Review Sections	**Settings by Rater**
Exclude from Overall Rating	Check box option that indicates if the section or item is excluded from (not used in calculating) the overall rating. When exclude the corresponding weight is set to 0.	Review Sections	Section Items
Include Competencies from Job Profile Classification	Check box option that indicates that the corresponding performance reviews will be automatically populated with competencies included in the job profile classification.	Section Items of Competency section only	Section Items
Include Competencies from Job Role	Check box option that indicates that the corresponding performance reviews will be automatically populated with competencies included in the employee's job role.	Section Items of Competency section only	Section Items

Field	Description	Applicable to	Section Header
Instruction	Field used to specify special instructions to be displayed under the title on the review form or the section. Data can be entered directly in the editor box or existing text can be selected, depending on the option selected - Select Review Text or Enter Review Text. Only text entered manually can be formatted using the text editor options.	Review Sections	Properties
Item Comment Mandatory	Setting that indicates whether it is mandatory for the manager and/or the employee to enter a comment for the item. This setting is not valid for the calibrator and not selected by default for the other two rater types.	Review Sections	**Settings by Rater**
Item Rating Control Type	Setting that identify the type of control used to rate items in the review section. Possible values are: • Drop-down menu - to present all rating options in a drop-down box where the rating can be selected. Suggested for 2 to 10 rating options. • Rating bar - to provide the ability for the user to select a rating along a visual continuum. Suggestion for text-based options or more than 10 options. • Toggle - to offer a binary rating option, for example, Yes/No	Review Section	Rating Models
Item Rating Mandatory	Setting that indicates whether it is mandatory for the manager, the calibrator and/or the employee to enter a rating for the item. This setting is not valid for the calibrator and not selected by default for the other two rater types.	Review Sections	**Settings by Rater**
Item Rating Model	Rating model used to rate items. The selection is made from a list of predefined rating models.	Review Sections	Rating Models
Manager	Column for indicating the manager ‘s permissions.	Review Sections	Settings by Rater
Measurement Text	Field that determines if the measurement text of goals is displayed and editable when included in a performance review.	Review Sections with Goal type only	Standard Fields
Measurement Type	Field that determines if the measurement type of goals is	Review Sections with Goal type only	Standard Fields

Field	Description	Applicable to	Section Header
	displayed and editable when included in a performance review.		
Name	Alphanumeric value used to indicate the name of an element (review, definition, section, item, cycle, request, text). In a list, the name is usually displayed with the code.	Review Sections	Properties
Name	Field that determines if the name of goals is displayed and editable when included in a performance review.	Review Sections with Goal type only	Standard Fields
Number of Decimals	Numeric value from 0 to 5 indicating the number of decimals to display when the rating is presented as a numeric value.	Review Sections	Rating Models
Override Section Rating Comment Mandatory	Setting that indicates if it is mandatory for the manager to provide a comment when overriding the auto-calculated overall rating.	Review Sections	Global Settings
Progress	Field that determines if the progress of goals is displayed and editable when included in a performance review.	Review Sections with Goal type only	Standard Fields
Rating Label	Field used to specify the text to be displayed as the rating label on the review form for the related section. It is possible to either select the default label, select an existing label from the review text library or to enter directly any other desired label in the entry box. The available options are: «Rating», Select Review Text or Enter Review Text. In edit more, the Enter Review Text option is not available.	Review Sections	Properties
Rating Value Selection Intervals	Display field that illustrates the associated rating model values according to the number of decimals.	Review Sections	Rating Models
Rating Value Selection Threshold (%)	Field used to define how the rounded average mathematically calculated is translated back to a discrete rating value that corresponds to the initial rating model. The corresponding values are shown under the Rating Value Selection Intervals field.	Review Sections	Rating Models
Rounding Interval Examples	Display field that illustrate a sample result of the selected Decimal Rounding Threshold for one single interval, according to the number of decimals specified.	Review Sections	Rating Models

Field	Description	Applicable to	Section Header
Section Comment Mandatory	Setting that indicates whether it is mandatory for the manager, the calibrator and/or the employee to enter a comment for the section. This setting is not valid for the calibrator and not selected by default for the other two rater types.	Review Sections	**Settings by Rater**
Section Rating Mandatory	Setting that indicates whether it is mandatory for the manager, the calibrator and/or the employee to enter a rating for the section. This setting is not valid for the calibrator and not selected by default for the other two rater types.	Review Sections	**Settings by Rater**
Section Rating Model	Rating model used for evaluating this section, selected from a list of predefined values.	Review Sections	Rating Models
Show Item Comment	Setting that indicates if a comment box for each item in the section is available on the review.	Review Sections	Item Settings
Show Item Description	Setting that indicates if the description of items is displayed for the review section. The description shows under the item title on the review form.	Review Sections	Item Settings
Show Item Rating	Check box option that indicates if the review displays item level ratings for the review section.	Review Sections	Rating Models
Show Item Rating As Numerical Value	Setting that indicates whether the rating of the item, when displayed, is represented as a numeric value or as a text description. This value corresponds to the 2nd element in the rating - [Rating Value Text] [Numerical Value of Rating Value] [Calculated Rating].	Review Sections	Item Settings
Show Item Rating Value	Setting that indicates whether the rating value is to be displayed as part of the item rating. This value corresponds to the 3rd element in the rating and indicates the calculated rating - [Rating Value Text] [Numerical Value of Rating Value] [Calculated Rating].	Review Sections	Item Settings
Show Item Title	Setting that indicates if the title of items is displayed for the review section.	Review Sections	Item Settings
Show Item Weight	Setting that indicates if the weight of items is displayed for the review section.	Review Sections	Item Settings

Field	Description	Applicable to	Section Header
Show Section Comment	Setting that indicates whether a comment field is available on review sections for entering comments about the section. This field is displayed on the Summary page of a section. **Note that for the comment entry box to display, the Show Section Summary setting **must also** be selected.	Review Sections	Global Settings
Show Section Overall Rating	Setting that indicates whether the overall rating is to be displayed for review sections. The overall rating is displayed on the Summary page of all review sections.	Review Sections	Global Settings
Show Section Overall Rating as Numerical Value	Setting that indicates whether the overall rating of the section, when displayed, is represented as a numeric value or as a text description. This value corresponds to the 2nd element in the rating - [Rating Value Text] [Numerical Value of Rating Value] [Calculated Rating].	Review Sections	Global Settings
Show Section Overall Rating Value	Setting that indicates whether the overall rating value is to be displayed on review section summaries. This value corresponds to the 3rd element in the rating and indicates the calculated rating - [Rating Value Text] [Numerical Value of Rating Value] [Calculated Rating].	Review Sections	Global Settings
Show Section Summary	Setting that indicates if a summary is displayed for the review section. This setting **must** be active for the Show Comment setting to be valid.	Review Sections	Global Settings
Show Sub-item	Setting that indicates if sub-competencies are displayed on the review form (when applicable). When this setting is **not** selected, **no other** sub-item settings are valid.	Review Sections with Competency type only	Sub-item Settings
Show Sub-item Comment	Setting that indicates if a comment box is displayed for each sub-competency. For this setting to be valid, the Show Sub-item setting **must** be checked.	Review Sections with Competency type only	Sub-item Settings
Show Sub-item Title	Setting that indicates if the title of the sub-competency is displayed on the review section. For this setting to be valid, the Show Sub-item setting **must** be checked.	Review Sections with Competency type only	Sub-item Settings
Show Target Rating	Setting that indicates if target ratings are displayed for competencies, when those	Review Sections	Item Settings

Field	Description	Applicable to	Section Header
	competencies are automatically imported in the review from the employee's job role or related job profile classification.		
Start Date	Field that determines if the start date of goals is displayed and editable when included in a performance review.	Review Sections with Goal type only	Standard Fields
Status	Field that determines if the status of goals is displayed and editable when included in a performance review.	Review Sections with Goal type only	Standard Fields
Stretch Value	Field that determines if the stretch value of goals is displayed and editable when included in a performance review.	Review Sections with Goal type only	Standard Fields
Summary Instruction	Field used to specify special instructions to be displayed under the title of the Summary page of the review form or the section. Data entry can be done directly in the editor box or existing text can be selected, depending on the option selected - Select Review Text or Enter Review Text. Only text entered manually can be formatted using the text editor options.	Review Sections	Properties
Summary Title	Field used to specify the title of the Summary page of the review form or the section, which is displayed on the performance review form. Data can be entered directly in the editing box or existing text can be selected, depending on the option selected - Select Review Text or Enter Review Text. Only text entered manually can be formatted using the text editor options.	Review Sections	Properties
Target Value	Field that determines if the target value of goals is displayed and editable when included in a performance review.	Review Sections with Goal type only	Standard Fields
Task Weight	Field that determines if the weight of tasks is displayed and editable when goals are included in a performance review.	Review Sections with Goal type only	Standard Fields
Tasks	Field that determines if tasks related to goals are displayed and editable when included in a performance review.	Review Sections with Goal type only	Standard Fields
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	Review Sections	Settings by Rater

Field	Description	Applicable to	Section Header
	Section Ratings. Disabled by default.		
Title	Field used to specify the title of the section or the review form displayed on the performance review form. Data can be entered directly in the editing box or existing text can be selected, depending on the option selected - Select Review Text or Enter Review Text. Only text entered manually can be formatted using the text editor options.	Review Sections	Properties
Type (of section)	Type of performance review section, selected from predefined types. Possible values are: • **Goal** - Indicates a section related to employee goals. • **Competency** - Indicates a section related to competencies. • **Competency Goal** - Indicates a section related to competency goals. • **Custom** - Indicates a customized section, to be defined by the user.	Review Sections	Properties
User-defined Fields	Section used to define if the user-defined fields used to provide goal information are to be displayed and editable when goals are included in a performance review.	Review Sections	User-defined Fields
Weight	Value that indicates how much a section counts towards the overall rating of a performance review. **Note: Since weights are **not** percentage values, the total weighting does not have to equal 100.	Review Sections	Section Items
Weight Equally Distributed	Check box option that indicates if the weight of each section included in the overall rating is equal distributed.	Review Sections	Section Items

Working with Review Section Items

Section Item

A section item represents the element being evaluated and is always part of a review section. A section item can be a goal (in a goal-type section), a competency (in a competency-type section) or any other item such as an accomplishment or development activity (in a custom-type section).

You can either add section items from a list of existing values or create them ad hoc depending on the type of review section. In a custom-type review section, section items are created ad hoc, as needed. In a competency-type review section, however, section items can only be selected from a list of active competencies drawn from the Taleo Competencies List and added. In a goal-type section, the goal items can be added ad hoc or drawn from the employee's goal plan (provided that option is selected).

Viewing a Section Item

Viewing a review section item is only possible for Competency and Custom type review sections. As for Goal type review section items, which consists of actual goals, they can only be viewed within the released employee review or self-assessment.

Configuration > **[Taleo Performance] Administration** > **[Performance Reviews] Review Definitions**

1. In the Review Definition Management page, click the name of the review definition containing the review section associated with the section item to be viewed.
2. In the Review Definition page, click the name of the Competency or Custom type review section containing the section item to be viewed.
3. In the Review Section page, if the review section is Custom type, click the name of the section item to view its properties. However, if the type is Competency, all the information available is already displayed on the Review Section page.

The selected section item information displays in the Section Item page if related to a Custom type review section or shows in the Review Section page, under Section Items, if related to a Competency type review section.

Creating a Section Item

Creating a new section item is only possible for Custom type review sections. Competency section items can only be added from existing ones and goal section items are managed via the Performance.

To create a section item for a review section, the type of the review section MUST be Custom. Furthermore, creation is only possible if the related review definition is in a Draft or Inactive status.

Configuration > **[Taleo Performance] Administration** > **[Performance Reviews] Review Definitions**

1. In the Review Definition Management page, click the name of the review definition that contains the review section for which you want to create a section item.
2. In the Review Definition page, click the name of the review section for which you want to create a section item.

3. In the Review Section page, click Create next to Section Items.
4. In the Section Item Editor page, specify the mandatory information related to the new item.
5. Click Save.

The newly created item displays in the list of section items of the Review Section page.

Newly created section items can then be reordered as desired and weighted accordingly.

Duplicating a Section Item

Duplicating a section item is only possible within a Custom type review section and is used to quickly create a new section item based on an existing one.

The type of the related review section must be Custom and the related review definition must be Draft of Inactive. If the related review definition is active, its deactivation will be required and will only be possible if not attached to an active review request.

Configuration > [Taleo Performance] Administration > [Performance Reviews] Review Definitions

1. In the Review Definition Management page, select the review definition related to the section item to be duplicated.
2. In the Review Definition page, select the Custom type review section containing the section item to be duplicated.
3. In the Review Section page, locate the section item to be duplicated.
4. Click Duplicate under Actions.

The duplicated section item displays in the Review Section page, in the list of section items, with an automatically-generated number preceding the original code. Furthermore, the weight of all items is automatically adjusted if the option to equally distribute the rating is selected.

The duplicated section item can then be edited as needed.

Adding a Section Item

Adding a section item is used to add a new competency in a Competency type review section.

To add a section item, the related review section type must be Competency and competencies must be drawn from the Taleo Competency Library. Furthermore, addition is only possible when the related review definition is in a Draft or Inactive status.

Configuration > [Taleo Performance] Administration > [Performance Reviews] Review Definitions

1. In the Review Definition Management page, click the name of the review definition that contains the review section to which you want to add a section item.
2. In the Review Definition page, click the name of the review section to which you want to add a section item.
3. In the Review Section page, click Add next to Section Items.
4. In the Competency Selector page, select the competencies to add.
5. Once all desired competencies are checked, click Select.

The selected competencies display in the list of section items in the Review Section page.

The newly added section items can then be reordered as desired and weighted accordingly.

Editing a Section Item

Editing a section item is only possible within a Custom type review section.

The type of the related review section must be Custom and the status of the related review definition must be Draft or Inactive.

Configuration > [Taleo Performance] Administration > [Performance Reviews] Review Definitions

1. In the Review Definition Management page, select the review definition related to the section item to be edited.
2. In the Review Definition page, select the Custom type review section containing the section item to be edited.
3. In the Review Section page, click the name of the section item to be edited.
4. In the Section Item page, click Edit next to Properties.
5. In the Section Item Editor, make the desired changes and click Save.

Changes made to the section item are reflected automatically in the Section Item page.

If needed, adjust the reordering and weighting of the section items. Also, if the related review definition had been deactivated to allow to edit the section item, make sure to reactivate it if needed.

Auto-Populating Competencies on Reviews

Auto-populating competencies on reviews is used to automatically include on the employees performance reviews all the competencies that are related to their job role or to a specific job profile classification. If the review form is configured to allow the addition of items, the review will first be populated with the competencies that are determined by the job role or job profile classification.

Configuration > [Taleo Performance] Administration > [Performance Reviews] Review Definitions

1. In the Review Definition Management page, click the name of the review definition for which you want to competencies to be automatically populated.
2. In the Review Definition page, click the name of the competency section in which should be populated the competencies.
3. In the Review Section page, click Edit next to Section Items.
4. In the Section Item Weight Editor page, check one of the following option, or both:
   - Include Competencies from Job Role - to populate reviews with the competencies of the employee's job role.
   - Include Competencies from Job Profile Classification - to populate reviews with the competencies based on the job profile classification corresponding to the employee.

   Whenever one of these two options is selected, the setting Rating Equally Distributed is automatically selected as it is required since there is no indication of the number of competencies that will be included in the reviews.
5. Click Save to complete and save the information.

The competencies will be automatically populated on the corresponding reviews as per the options selected.

Editing the Weight of a Section Item

Editing the weight of a section item is done to modify the weight value of an item within a section when the overall rating is not equally distributed or to exclude or include an item in the overall rating calculation.

To edit the weight, you need to have at least one item in the selected review section.

Configuration > [Taleo Performance] Administration > [Performance Reviews] Review Definitions

1. In the Review Definition Management page, click the name of the review definition for which you want to edit the weight of a section item.
2. In the Review Definition page, click the name of the review section that contains the section item to be weighted.
3. In the Review Section page, click Edit next to the Section Items heading.
4. In the Section Item Weight Editor page, specify which section is to be included in the overall rating by checking or not the Exclude from Overall Rating option.
5. Again, in the Section Item Weight Editor page, specify whether the rating is to be equally distributed by checking or not the Rating Equally Distributed option. If checked, this means that all items will have the same weight in the calculation of the overall rating, which will be automatically calculated and evenly distributed. If not checked, the desired weight value will need to be entered for all included items.
6. If competencies displayed in the review are to be drawn from the employee's job role, check the Include Competencies from Job Role option.
7. Click Save to complete and save the edited information.

The edited weight and rating information display under Section Items in the Review Section page.

Reordering Section Items

Reordering section items within a review section is used to place the items in a specific order in the sections of the review form.

The section items can be reordered at any time, whether they are included or not in the overall rating.

Configuration > [Taleo Performance] Administration > [Performance Reviews] Review Definitions

1. In the Review Definition Management page, select the review definition related to the items to be reordered.
2. In the Review Definition page, select the review section that contains the items to be reordered.
3. In the Review Section page, click Reorder next to Section Items.
4. In the Reorder Section Items page, highlight an item and use the Up and Down arrows to move the item to the desired location.
5. Once all items are in the desired order, click Save.

The section items presented under Section Items display in the list according to the defined order.

Deleting a Section Item

Deleting a section item is possible within a Custom or Competency type review section.

The type of the related review section must be Custom or Competency and the related review definition must be Draft of Inactive.

Configuration > [Taleo Performance] Administration > [Performance Reviews] Review Definitions

1. In the Review Definition Management page, select the review definition related to the section item to be deleted.
2. In the Review Definition page, select the Custom or Competency type review section containing the section item to be deleted.
3. In the Review Section page, locate the section item to be deleted.
4. Click Delete under Actions.

The deleted section item no longer displays in the Review Section page, in the list of section items. Furthermore, the weight of the remaining items is automatically adjusted if the option to equally distribute the rating is selected.

Section Item Fields

Fields displayed in Section Items 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
Code	Unique alphanumeric code used to identify an element (review, definition, section, item, cycle, request, text). In a list, the code is usually displayed with the name.	Section Items	Properties
Description	Field used to specify a more detailed description of the section item displayed on the performance review form, just under the Title of the section item.	Section Items	Properties
Exclude From Overall Rating	Check box option that indicates if the section or item is excluded from (not used in calculating) the overall rating.	Section Items	Section Items
Include Competencies from Job Profile Classification	Check box option that indicates that the corresponding performance reviews will be automatically populated with competencies based on the job profile classification.	Section Items of Competency or Competency Goal type sections only	Section Items
Include Competencies from Job Role	Check box option that indicates that the corresponding performance reviews will be automatically populated with competencies based on the employee's job role.	Section Items of Competency or Competency Goal type sections only	Section Items
Name	Alphanumeric value used to indicate the name of a given element (review, definition, section,	Section Items	Properties

Field	Description	Applicable to	Header
	item, cycle, request, text). In a list, the name is usually displayed with the code.		
Title	Field used to specify the title of the section item to be displayed on the performance review form. Data can be entered directly in the editing box or existing text can be selected, depending on the option selected - Select Review Text or Enter Review Text. Only text entered manually can be formatted using the text editor options.	Section Items	Properties
Weight	Value that indicates how much a section counts towards the overall rating of a performance review. **Note: Since weights are **not** percentage values, the total weighting does not have to equal 100.	Section Items	Section Items

Working with Review Texts

Review Text

Review text is any string of text such as a title, instruction, summary title, summary instruction or description, used in a review.

Review text is created directly in the Review Text Library. Any newly created text, whether it is created in a review definition or section or via the Review Text Library, is automatically added to the list of available review texts and has Active status.
Following is the list of HTML tags supported by Flex for the instruction text:

- *Anchor tag (<a>)*
- *Bold tag (<b>)*
- *Break tag (<br>)*
- *Font tag (<font>)*
- *Image tag (<img>)*
- *Italic tag (<i>)*
- *List item tag (<li>)*
- *Paragraph tag (<p>)*
- *Text format tag (<textformat>)*
- *Underline tag (<u>)*

Note: Although images are supported within instructions, they must be at the beginning/top of the instructions to render properly. Tables are not supported.

Viewing a Review Text

Viewing a review text allows to see a specific review text and its contextualized values, if any.

Configuration > **[Taleo Performance] Administration** > **[Performance Reviews] Review Text Library**

1. In the Review Text Management page, click the name of the review text to be viewed.

   Make sure to also check the code and the type of the review text as the same name can be reused for all four types of text.

The selected review text information displays in the related Review Text page.

Creating a Review Text

Creating a review text allows to define default texts to be used as titles, instructions or descriptions in review definitions and sections.

Configuration > **[Taleo Performance] Administration** > **[Performance Reviews] Review Text Library**

1. In the Review Text Management page, click Create next to Review Texts.
2. In the Review Text Editor page, enter the new review text's language, properties and default value.
3. Click Save.

The new review text information displays in the Review Text page with a Draft status.

The newly created review text must be activated to be available for selection in review definitions and sections. Furthermore, once the review text is created, contextualized values can be added to apply to specific contexts.

Duplicating a Review Text

Duplicating a review text is used to quickly create a new review text based on an existing one and copies the review text information as well as its related contextualized values, if any.

Duplication is always possible, whatever the review text's status.

Configuration > **[Taleo Performance] Administration** > **[Performance Reviews] Review Text Library**

1. In the Review Text Management page, locate the review text to be duplicated.
2. Click Duplicate under Actions.

The duplicated review text displays in the list of review texts with an automatically-generated number preceding the original code and a Draft status.

The duplicated review text can then be edited as needed and must be activated to be available for selection in review definitions and sections.

Editing a Review Text

Editing a review text can be done at any time, whatever its status, and is automatically reflected in the relevant reviews.

Configuration > **[Taleo Performance] Administration** > **[Performance Reviews] Review Text Library**

1. In the Review Text Management page, click the name of the review text to be edited.
2. In the Review Text page, click Edit next to Properties.
3. In the Review Text Editor page, make the necessary changes.
4. Click Save.

The edited review text is reflected in the Review Text page and all changes made to the properties of the text or its contextualized values, if any, are applied automatically to all reviews using that text, even if attached to an active review request. If the review text is not already active, it will need to be activated to be available for selection.

Activating a Review Text

Activating a review text is used to change the status of a review text from Draft or Inactive to Active and is necessary for the review text to be available for selection in review definitions and sections.

To activate a review text, its status must be Draft or Inactive.

Configuration > **[Taleo Performance] Administration** > **[Performance Reviews] Review Text Library**

1. In the Review Text Management page, locate the review text to be activated.
2. Click Activate under Actions.

The activated review text shows an Active status.

The activated review text can then be selected and used as a title, an instruction or a description in review definitions and sections.

Deactivating a Review Text

Deactivating a review text is used to change the status of a review text from Active to Inactive, therefore making the review text unavailable for selection in review definitions and sections.

To deactivate a review text, its status must be Active and the text MUST NOT be in use in any review.

Configuration > **[Taleo Performance] Administration** > **[Performance Reviews] Review Text Library**

1. In the Review Text Management page, locate the review text to be deactivated.
2. Click Deactivate under Actions.

   Note that the Deactivate link is always displayed, whether deactivation is allowed or not.

The deactivated review text shows an Inactive status and therefore can no longer be selected and used as a title, an instruction or a description in review definitions and sections..

If the deactivated text needs to be used, it will need to be reactivated.

Deleting a Review Text

Deleting a review text is used to remove completely a review text for the list of available text in the Review Text Library.

To delete a review text, its status can only be Draft or Inactive. Furthermore, if inactive, the review text MUST NOT be in use in any review.

Configuration > [Taleo Performance] Administration > [Performance Reviews] Review Text Library

1. In the Review Text Management page, locate the review text to be deleted.
2. Click Delete under Actions.

The deleted review text no longer displays in the list of review texts.

Review Text Fields

Fields displayed in Review Texts 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
Code	Unique alphanumeric code used to identify an element (review, definition, section, item, cycle, request, text). In a list, the code is usually shown along with the name.	**Review Texts**	Properties
Default Value	Value of the title, instruction or description. The default value is used at all times when no specific contextualized value has been defined.	Review Texts	Properties
Name	Alphanumeric value used to indicate the name of a given element (review, definition, section, item, cycle, request, text). In a list, the name is usually displayed with the code.	**Review Texts**	Properties
Status	Status of the selected element. Possible values are: • **Draft** - When in Draft status, an element can be viewed and edited but not applied or associated with another	Review Texts	Properties

Field	Description	Applicable to	Header
	element. Before you can use a Draft element, it must be activated. Once the status of an element has changed from Draft to another status, it can never have Draft status again. • **Inactive** - While it has Inactive status, an element can be edited or deleted but it cannot be applied or associated with another element. Before you can use an Inactive element, it must be activated. You can only delete or edit an element while its status is Inactive. • **Active** - While it has Active status, an element cannot be edited or deleted but it can be applied and associated with another element. Before you can edit an active element, it must be deactivated.		
Type	Type of the text entered. Possible values are: • Title - Text that serves as any title or summary title. • Instruction - Text that serves as any instruction or summary instruction. • Description - Text that serves as a description.	Review Texts	Properties

Working with Contextualized Values

Contextualized Value

A contextualized value is a text string that is displayed on the performance review form and is different from the default text. It is displayed only in specific contexts (particular statuses, processes or raters).

Any string of text that is used within the review form, such as a title, an instruction, a summary title or a summary instruction can be contextualized. Contextualized values can be created directly within a specific review definition or section. If the text is created via the Review Text Library, it can be reused afterward.
Values can be contextualized by:

- Rater type - a manager, employee, approver and/or HR administrator.
- Review status - any step in the workflow of a review.

For example, the instruction for completing a goal section might be different depending on whether the user is a manager or an approver. In the case where there is a combination of contexts, a status-type context always takes precedence over a rater-type context.

Viewing a Contextualized Value

Viewing a contextualized value is done for a given review text and allows to see the contexts in which a specific value applies.

Configuration > **[Taleo Performance] Administration** > **[Performance Reviews] Review Text Library**

1. In the Review Text Management page, click the name of the review text containing the contextualized value to be viewed.
2. In the Review Text page, click the name of the contextualized value to be viewed.

The selected contextualized value displays in the Contextualized Value page, along with the rater types and review statuses it applies to.

Creating a Contextualized Value

Creating a contextualized value for a review text allows to define a different value specific to a given rater type or review status.

To create a contextualized value, you need to have a default review text to associated it to.

Configuration > **[Taleo Performance] Administration** > **[Performance Reviews] Review Text Library**

1. In the Review Text Management page, click the name of the review text for which a contextualized value is to be created.
2. In the Review Text page, click Create next to Contextualized Values.
3. In the Contextualized Value Editor page, enter the desired text value and click Save.
4. In the Contextualized Value page, specify the applicable context of the value by selecting the desired rater types and/or review statuses.
5. Depending on the desired context, click Add next to Rater Types or Review Statuses.
6. In the Rater Type Selector or in the Review Status Selector, check all applicable contexts and click Select.

The applicable contexts of the new contextualized value will display in the Contextualized Value page, as well as on the Review Text page, along with all contextualized values.

Editing a Contextualized Value

Editing a contextualized value related to a review text is used to either modify an existing value or its applicable contexts.

Configuration > **[Taleo Performance] Administration** > **[Performance Reviews] Review Text Library**

1. In the Review Text Management page, click the name of the review text for which a contextualized value is to be edited.

2. In the Review Text page, click the name of the contextualized value to be edited.
3. In the Contextualized Value page, click Edit next to the title of the page.
4. In the Contextualized Value Editor page, make the necessary change to the value.
5. Click Save.
6. Back to the Contextualized Value page, edit the contexts as needed by adding or removing rater types and/or review statuses.

The edited contextualized value text displays in the Review Text page, in the list of contextualized values, along with its applicable rater types and review status, if any. All changes made to a value or its contexts are applied automatically to all reviews using that text, even if attached to an active review request. If the review text is not already active, it will need to be activated to be available for selection.

Deleting a Contextualized Value

Deleting a contextualized value related to a review text is used to remove a value specific to a given context, along with all its applicable contexts.

Since there is no status associated to a contextualized value, deletion can be done anytime, and whatever the related review text's status is.

Configuration > **[Taleo Performance] Administration** > **[Performance Reviews] Review Text Library**

1. In the Review Text Management page, click the name of the review text for which a contextualized value is to be deleted.
2. In the Review Text page, locate the contextualized value to be deleted.
3. Click Delete under Actions.

The review text is removed from the list of contextualized values displayed in the Review Text page. Deletion of a contextualized value also deletes all applicable rater types and/or review statuses When a contextualized value is deleted, the related review text, which is considered the default value, is used in the review forms.

Adding a Rater Type

Adding a rater type allows to specify the rater type context to which a contextualized value applies.

To add a rater type, you need to have first defined the related default review text and specified a contextualized value.

Configuration > **[Taleo Performance] Administration** > **[Performance Reviews] Review Text Library**

1. In the Review Text Management page, click the name of the review text for which a rater type is to be added for a given contextualized value.
2. In the Review Text page, click the name of the contextualized value for which a rater type is to be added.
3. In the Contextualized Value page, click Add next to Rater Types.
4. In the Rater Type Selector page, check the rater types to which the contextualized value should apply.
5. Click Select.

The selected rater types display in the Contextualized Value page, in the list of rater types. The specified value is then displayed to the selected raters when viewing the review form.

In case where both rater types and review statuses are applicable to a contextualized value and occur at the same time, the review statuses takes precedence.

Removing a Rater Type

Removing a rater type allows to completely remove a rater type as an applicable context for a contextualized value.

Configuration > **[Taleo Performance] Administration** > **[Performance Reviews] Review Text Library**

1. In the Review Text Management page, click the name of the review text for which a rater type is to be deleted for a given contextualized value.
2. In the Review Text page, click the name of the contextualized value for which a rater type is to be deleted.
3. In the Contextualized Value page, click Remove next to the rater type to be deleted or click Remove All next to Rater Types to delete all applicable types at once.

The deleted rater type no longer displays in the Contextualized Value page, in the list of rater types. If a contextualized value has no applicable context (no rater type or review status), the default review text is used.

Adding a Review Status

Adding a review status allows to specify a review status context to which a contextualized value applies.

Configuration > **[Taleo Performance] Administration** > **[Performance Reviews] Review Text Library**

1. In the Review Text Management page, click the name of the review text for which a review status is to be added for a given contextualized value.
2. In the Review Text page, click the name of the contextualized value for which a review status is to be added.
3. In the Contextualized Value page, click Add next to Review Statuses.
4. In the Review Status Selector page, check the review statuses to which the contextualized value should apply.
5. Click Select.

The selected review statuses display in the Contextualized Value page, in the list of review statuses. The specified value is then displayed whenever the selected review statuses occur.

In case where both rater types and review statuses are applicable to a contextualized value and occur at the same time, the review statuses takes precedence.

Removing a Review Status

Removing a review status allows to completely remove a review status as an applicable context for a contextualized value.

Configuration > **[Taleo Performance] Administration** > **[Performance Reviews] Review Text Library**

1. In the Review Text Management page, click the name of the review text for which a review status is to be deleted for a given contextualized value.
2. In the Review Text page, click the name of the contextualized value for which a review status is to be deleted.
3. In the Contextualized Value page, click Remove next to the review status to be deleted or click Remove All next to Review Statuses to delete all statuses at once.

The deleted review status no longer displays in the Contextualized Value page, in the list of review statuses. If a contextualized value has no applicable context (no rater type or review status), the default review text is used.

Contextualized Value Fields

Fields displayed in Contextualized Values 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
Rater Types	Indication of the types of rater who can see the contextualized value when the review form is displayed. Possible values are: • Manager Review - In cases where a manager is completing an employee's performance review. • Self-Assessment - In cases where an employee is completing his/her own performance review. • Approver - In cases where an approver is completing an employee's performance review. • HR Administrator - In cases where an HR administrator is completing an employee's performance review.	Contextualized Values	None
Review Statuses	Indication of review statuses during which the contextualized value is displayed. Possible values are: • New - In cases where a new performance review is displayed. • Draft - In cases where a draft performance review is displayed. • To Be Approved - In cases where a performance review is to be approved. • Under Approval - In cases where a performance review is under approval. • Approved - In cases where a performance review is approved.	Contextualized Values	None

Field	Description	Applicable to	Header
	• Released - In cases where a performance review is released. • Acknowledged - In cases where a performance review is acknowledged. • Closed - In cases where a performance review is closed. • Acknowledgment Requested - In cases where an acknowledgment is requested for a performance review. • Canceled - In cases where a performance review is canceled.		
Text Value	Text value used for the specified rater types and/or review statuses.	Contextualized Values	None

Working with Review Cycles

Review Cycle

A review cycle corresponds to a time period in which performance is reviewed. The review cycle also determines the review groups that are covered in the cycle as well as the review requests that occur during the cycle.

There are two types of review cycles: the Focal type of review, which corresponds to any yearly review; and Other, which corresponds to all review types other that Focal. The review cycle type is only used for tracking and reporting purposes.

Viewing a Review Cycle

Viewing a review cycle allows to view the review cycle's properties and related review groups and requests.

Configuration > [Taleo Performance] Administration > [Performance Reviews] Review Cycles

1. In the Review Cycle Management page, click the name of the review cycle to be viewed.
2. In the Review Cycle page, you can view the review cycle's properties as well as the review groups and requests associated to the review cycle.

The selected review cycle information displays in the Review Cycle page.

Creating a Review Cycle

Creating a review cycle allows to define a given time period to be evaluated as well as the associated review groups and requests.

Configuration > [Taleo Performance] Administration > [Performance Reviews] Review Cycles

1. In the Review Cycle Management page, click Create next to Review Cycles.
2. In the Review Cycle Editor page, specify the review cycle's properties, which are all mandatory.
3. Click Save to save the properties of the newly created review cycle.
4. Proceed with *Creating a Review Group* and *Creating a Review Request*.

The newly created review cycle displays in the list of cycles of the Review Cycle Management page.

Once the properties of the cycle are created, you need to create the corresponding review groups and review requests.

Duplicating a Review Cycle

Duplicating a review cycle is used to quickly create a new review cycle based on an existing one.

Any review cycle can be duplicated.

Configuration > [Taleo Performance] Administration > [Performance Reviews] Review Cycles

1. In the Review Cycle Management page, locate the review cycle to be duplicated.
2. Click Duplicate under Actions.

The duplicated review cycle displays in the list of review cycles, in the Review Cycle Management page, and shows an automatically-generated number preceding the original code.

The duplicated review cycle can then be edited as needed.

Editing a Review Cycle

Editing a review cycle allows to modify a review cycle's properties as well as its associated review groups and requests.

Review cycles can be edited at any time, whatever the status of any associates review request but it is a better practice not to edit a review cycle once the related reviews have been assigned.

Configuration > [Taleo Performance] Administration > [Performance Reviews] Review Cycles

1. In the Review Cycle Management page, select the name of the review cycle to be edited.
2. In the Review Cycle page, click Edit next to Properties.
3. In the Review Cycle Editor page, make the desired changes.
4. Click Save.

The edited information is automatically applied and displayed in the Review Cycle page.

Editing a review cycle often implies editing the related review groups and requests.

Deleting a Review Cycle

Deleting a review cycle is done to eliminate completely a review cycle.

To delete a review cycle, it MUST not include any review group or review request. If deletion is not possible, a message to this effect will be displayed and the deletion of included groups or requests will be required beforehand.

Configuration > **[Taleo Performance] Administration** > **[Performance Reviews] Review Cycles**

1. In the Review Cycle Management page, locate the review cycle to be deleted.

   The Delete button is always displayed, whether deletion is allowed or not.
2. Click Delete under Actions.

The deleted review cycle no longer displays in the list of review cycles.

Review Cycle Fields

Fields displayed in Review Cycles 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
Code	Unique alphanumeric code used to identify an element (review, definition, section, item, cycle, request, text). In a list, the code is usually displayed with the name.	Review Cycles	Properties
End Date	Date on which the review cycle period ends. Selected from the calendar. Together, the start and end dates determine the review cycle period. The review cycle corresponds to the entire period under evaluation. A review cycle can in turn include multiple review requests.	Review Cycles	Properties
Name	Alphanumeric value used to indicate the name of an element (review, definition, section, item, cycle, request, text). In a list, the name is usually displayed with the code.	Review Cycles	Properties
Start Date	Date on which the review cycle period starts. Selected from the calendar. Together, the start and end dates determine the review cycle period. The review cycle corresponds to the entire period under evaluation. A review cycle	Review Cycles	Properties

Field	Description	Applicable to	Header
	can in turn include multiple review requests.		
Type (of cycle)	Type of cycle, which is currently used for reporting purposes only. Possible values are: • Focal - For all yearly performance reviews. • Other - For all other types of performance reviews.	Review Cycles	Properties

Working with Review Groups

Review Group

A review group is one employee or a group of employees who are to be evaluated within a given review period. Review group constraints are used to define who is part of a review group.

Specific review groups are defined using a query builder in which you specify various criteria and AND and OR operators. For example, to create a group that included everyone in Sales and Marketing, you would use the AND operator. Note that if no constraints are specified for a review group, the group includes all the organization's employees.

Viewing a Review Group

Viewing a review group allows to view the constraints used to define the employees composing the group.

Configuration > [Taleo Performance] Administration > [Performance Reviews] Review Cycles

1. In the Review Cycle Management page, click the name of the review cycle associated to the review group to be viewed.
2. In the Review Cycle page, click the name of the review group to be viewed.
3. To view the list of employees included in the review group, click Preview Employees next to Review Group Constraints.

The selected review group information displays in the Review Group page.

Creating a Review Group

Creating a review group within a review cycle is used to define the properties of a review group, which includes the list of the employees to be evaluated during a given review cycle. If not all employees are to be included in the review group, review group constraints also have to be defined.

To create a review group, you need to have a review cycle to include it in.

Configuration > **[Taleo Performance] Administration** > **[Performance Reviews] Review Cycles**

1. In the Review Cycle Management page, click the name of the review cycle for which a review group is to be created.
2. In the Review Cycle page, click Create next to Review Groups.
3. In the Review Group Editor page, specify the properties of the review group, which are all mandatory.
4. As needed, proceed with *Creating a Review Group Constraint* if not all employees are to be included in the group.
5. C lick Save.

The name of the new review group displays in the Review Cycle page, in the list of review groups.

Once the review group's properties are defined, it might be necessary to create review group constraints in order to include specific employees in the group.

Duplicating a Review Group

Duplicating a review group is used to quickly create a new review group based on an existing one.

Any review group can be duplicated.

Configuration > **[Taleo Performance] Administration** > **[Performance Reviews] Review Cycles**

1. In the Review Cycle Management page, click the name of the review cycle that contains the review group to be duplicated.
2. In the Review Cycle page, locate the review group to be duplicated.
3. Click Duplicate under Actions.

The duplicated review group displays in the Review Group page and shows an automatically-generated number preceding the original code. When a review group is duplicated, the review groups and requests are also duplicated, with the difference that the duplicated review request is in a Draft status.

The duplicated review group can then be edited as needed and the related review request activated.

Editing a Review Group

Editing a review group within a review cycle is used to modify the properties of a review group and most often implies the creation or modification of the related review group constraints to include specific employees in the group.

Review groups can be modified at all times.

Configuration > **[Taleo Performance] Administration** > **[Performance Reviews] Review Cycles**

1. In the Review Cycle Management page, click the name of the review cycle for which a review group is to be edited.
2. In the Review Cycle page, click the code of the review group to be edited.
3. In the Review Group page, edit the review group's properties as needed.
4. Also, if needed, edit the review group constraints.(See *Editing a Review Group Constraint*)
5. Click Save.

The edited information is automatically applied and displayed in the relevant review cycle.

Once the review group's properties are modified, it might also be necessary to modify the review group constraints in order to edit the specific employees composing the group.

Deleting a Review Group

Deleting a review group within a review cycle is used to remove a review group from a review cycle.

Deletion of a review group is only possible if the review group is not used in an active review request or attached to an active employee review. To delete a review group, it might be necessary to deactivate or delete the related review request.

Configuration > **[Taleo Performance] Administration** > **[Performance Reviews] Review Cycles**

1. In the Review Cycle Management page, click the name of the review cycle for which a review group is to be deleted.
2. In the Review Cycle page , locate the review group to be deleted.
3. Click Delete under Actions.

The deleted review group no longer displays in the list of review groups of the relevant review cycle.

Review Group Fields

Fields displayed in Review Groups 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
Group Code	Unique alphanumeric code used to identify a review group or a review request group. Note that the Group Code is the only identifier because no name is specified for the group.	Review Groups	Properties
Locale	Mandatory field used to indicate the review language for the employees in the group and for the manager completing the review of these employees. The review will be displayed to the employees in the group as well as to their manager in the specified language.	Review Groups	Properties
Review Group Administrator	Name of the HR administrator associated with the review group, to be selected from the User Selector. The review group administrator is responsible for: making sure the review process is performed; approving reviews when HR approval is included	Review Groups	Properties

Field	Description	Applicable to	Header
	in the approval chain; logging in to perform HR administration functions.		

Working with Review Group Constraints

Review Group Constraint

A review group constraint is a criterion used to define a group of employees in a review group.

You can configure review group constraints to include only one employee or a group of employees. Furthermore, the query can be constructed to include only one constraint or multiple constraints linked by AND or OR operators. If no constraints at all are configured, the review group will include all the organization's employees.

Viewing a Review Group Constraint

Viewing a review group constraint is usually done to verify if the list of employees corresponds to the defined constraints.

Configuration > **[Taleo Performance] Administration** > **[Performance Reviews] Review Cycles**

1. In the Review Cycle Management page, click the name of the review cycle for which a review constraint is to be viewed.
2. In the Review Cycle page, click the code of the relevant review group.
3. To view the list of the corresponding employees, Preview Employees next to Review Group Constraints.

The review group constraint information displays in the Review Group page, under Review Group Constraints.

Creating a Review Group Constraint

Creating review group constraints is used to determine the specific employees composing a review group. The definition of constraints is similar to defining a query.

To define review group constraints, you need to have a review group to add them in.

Configuration > **[Taleo Performance] Administration** > **[Performance Reviews] Review Cycles**

1. In the Review Cycle Management page, click the name of the review cycle for which one or more review constraints need to be created.
2. In the Review Cycle page , click the code of the relevant review group.
3. In the Review Group page, click Edit next to the title of the page.
4. In the Review Group Editor page, click Create next to Review Group Constraints.
5. In the Review Group Constraints Wizard page, specify the field to be searched and the operator to base your search on.

6. Click Next.
7. On the next page of the wizard, specify the value to search for in the previously defined field.
8. Click Finish.
9. If the search is based on only one constraint, go to the next-to-last step.
10. If the search is based on more than one constraint, in the Review Group Editor page, click Insert under Actions.
11. Define the next constraint by repeating steps 5 to 8, for as many constraints as needed.
12. When there is more than one constraint under Review Group Constraints, specify the binding logical operator. The AND operator will search employees that correspond to all, as the OR operator will find employees that match to one or the other.
13. Once all constraints are defined, click Save.
14. Back on the Review Group page, click Preview Employees to verify if all desired employees are included in the list.

Once the review group constraints are defined and the review group employees previewed, the next step is to create a review request.

Editing a Review Group Constraint

Editing a review group constraint is done to modify an existing constraint. Any change made to a constraint is applicable as of the review reference date when prior to the current date.

To edit a review group constraint, the relevant review group must be in edit mode.

Configuration > **[Taleo Performance] Administration** > **[Performance Reviews] Review Cycles**

1. In the Review Cycle Management page, click the name of the review cycle for which a review constraint is to be edited.
2. In the Review Cycle page, click the code of the relevant review group.
3. In the Review Group page, click Edit next to the title of the page.
4. In the Review Group Editor page, locate the review group constraint to be edited.
5. Click Edit under Actions.
6. In the Review Group Constraint Editor page, modify the value by either editing the value itself or by adding or removing a value using a selector, depending on the related searched field.
7. Once the constraint is edited as required, click Save.
8. On the Review Group Editor page, review the information and click Save.
9. Back on the Review Group page, click Preview Employees to verify that the change is reflected in the list of employees.

The change made displays in the list of Review Group Constraints and be reflected in the list of the review group employees.

Note that it is upon review assignment that the constraint query supporting the group is executed to obtain the list of employees targeted by the group. If any review group constraint is modified, it is only when the review request is reactivated that those modifications will be applied by creating reviews only for the employees that were missed the first time around. Employees that already have a review for this review request will not get a duplicate one and their current review will remain unaffected.

Previewing the Review Group Employee List

Previewing the review group employee list allows to display all the employees composing the review group based on the defined constraints and allows to verify if the list of employees to be evaluated is accurate.

To preview the list of employees, you need to have previously defined the review group and review group constraints.

Configuration > **[Taleo Performance] Administration** > **[Performance Reviews] Review Cycles**

1. In the Review Cycle Management page, click the name of the review cycle associated to the review group employee list to be viewed.
2. In the Review Cycle page, click the code of the review group to be viewed.
3. In the Review Group page, click Preview Employees next to Review Group Constraints.

All the employees composing the review group should display in the Review Group Employees page.

Removing a Review Group Constraint

Removing a review group constraint is done to delete an existing constraint.

To be able to remove a review group constraint, the relevant review group must be in edit mode.

Configuration > **[Taleo Performance] Administration** > **[Performance Reviews] Review Cycles**

1. In the Review Cycle Management page, click the name of the review cycle for which a review constraint is to be removed.
2. In the Review Cycle page, click the code of the relevant review group.
3. In the Review Group page, click Edit next to the title of the page.
4. In the Review Group Editor page, locate the review group constraint to be removed.
5. Click Remove under Actions.
6. Click Preview Employees next to Review Group Constraint to verify that the removal of the constraint is reflected in the list of employees.

The removed constraint no longer displays in the list of review group constraints and should be reflected in the list of the review group employees.

Review Group Constraint Fields

Fields displayed in Review Group Constraints 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
Field	Field used to define the constraints used to search for employees. The Field field is used in combination with the Operator and Value fields	Review Group Constraints	Properties

Field	Description	Applicable to	Header
	to determine the employees who make up the review group. The fields are: • Employee ID - Searches for an employee ID number, as defined in SmartOrg > User Account > Personal Information. This field supports all operators. • Employee Status - Searches for an employee's status, as defined in SmartOrg > User Account > Employee Information. This field supports all operators. • Job Code - Searches for an employee's job code (external job role code), as defined in SmartOrg > Job Roles. This field supports all operators. • Job Role Code - Searches for an employee's job role code (main job role code), as defined in SmartOrg > Job Roles. This field supports all operators. • Job Role Name - Searches for an employee's job role name, as defined in SmartOrg > Job Roles. This field supports all operators. • Job Level - Searches for an employee's job role level, as defined in SmartOrg > Job Roles. This field supports all operators. • Department Number - Searches for an employee's department number, as defined in the AWT > SmartOrg menu > Departments. This field supports all operators. • Department Name - Searches for an employee's department name, as defined in SmartOrg > User Account > Personal Information. This field supports all operators. • Location - Searches for an employee's location, as defined in SmartOrg > User Account > Employee Information. This field supports only positive operators, i.e. Equals and Included In.		

Field	Description	Applicable to	Header
	• Organization - Searches for an employee's organization, as defined in SmartOrg > User Account > Employee Information. This field supports only positive operators, i.e. Equals and Included In. • Job Field - Searches for an employee's job field, as defined in SmartOrg > Job Roles. This field supports only positive operators, i.e. Equals and Included In. • UDF - Searches for employee and employee goal user-defined fields, as defined in Performance > Custom Field-test field supports only positive operators, i.e. Equals and Included In. **Note: The UDFs may be created and maintained in Performance but their values may only be set through the Connect Offer.		
Logical Operator	Operator that combines review group constraints when more than one of the latter are used to define the employees who make up a review group. There are two operators: • And - When used, the search will search for employees who match all the constraints bound by this operator. • Or - When used, the search will search for employees who match one or the other of the constraints bound by this operator.	Review Group Constraints	(List)
Operator	Combined with the Field and Value information, this operator indicates what to search for and the relationship between the field and the specified value. Possible operators are: • Equals - This operator is used to search for employees based on the specified value in the specified field. • Not Equals - This operator is used to search for employees who do not have the specified value in the specified field. • Included In - This operator is used to search for employees	Review Group Constraints	Properties

Field	Description	Applicable to	Header
	who have one of the values entered in Value in the specified Field. With this operator, it is possible to enter multiple values in Value, each value separated from the others by a comma. • Excluded From - This operator is used to search for employees who do not have one of the values entered in Value in the specified field. With this operator, it is possible to enter multiple values in Value, each value separate from the others by a comma.		
Value	Value searched within the specified field, in accordance with the specified operator. The value is used in combination with the operator and the field to determine the employees who make up the review group. • Employee ID - Value to be entered as text. • Employee Status - Unique value to be selected from a drop-down list of values (New, Current, Terminated). • Job Code - Value to be entered as text. • Job Role Code - Value to be entered as text. • Job Role Name - Value to be entered as text. • Job Level - Unique value to be selected from a drop-down list of values (Entry Level, Individual Contractor, Team Leader, Manager, Director, Executive, Manager With Direct Reports, Manager Without Direct Reports, Senior Executive). • Department Number - Value to be entered as text. • Department Name - Value to be entered as text. • Location - Unique value to be selected from the Location Selector. • Organization - Unique value to be selected from the Organization Selector.	Review Group Constraints	Properties

Field	Description	Applicable to	Header
	• Job Field - Unique value to be selected from the Job Field Selector.		

Working with Review Requests

Review Request

A review request is the process by which a specific performance review is assigned to a group of employees for a given review period. You also use a review request to define the workflow of the performance review, specify all the steps in the workflow process and set various permission related settings.

The review request is defined as part of the review cycle. Once the review request is defined and activated, the performance review is assigned to the associated groups on the specified review assignment date, which indicates when the performance review is available to the employee for completion.

Review requests can be defined based on the review request dates or on a business period. This second option provides the ability to have a mid-year review that include goals that are to be completed by year-end.

Process Definition

The process definition defines the workflow applicable to a performance review and can include as many as five different steps, which in turn include tasks.

The workflow applied to a review form, whether the review needs to be approved, released or acknowledged is defined by the process definition as part of a review request. Furthermore, each step of a process definition can include multiple tasks, which are assigned to an employee, a manager or an administrator, depending also on the configuration of the process definition and its related parameters. The five steps that can be included in a process definition are as follows:

- **Draft** - The Draft step is always present and is composed of two parallel steps.

  a) Self-Assessment - The employee completes an evaluation of his/her own performance. The items (e.g., goals and competencies) the employee evaluates are the same items on which the manager will rate the employee in the performance review. Employees submit their performance review to their manager who can use the employee's self-evaluation as input for writing the performance review.

  b) Manager Assessment – The manager completes a formal evaluation of the employee's performance within a defined review period. Once submitted for approval, the review cannot be edited.
- **Approve** - Approvers examine the performance review for accuracy, word choice, appropriateness of the language used, and then they either approve or reject the performance review. Approvers cannot edit the review. Approval will send the performance review to the next step in the business process. Rejection of the performance review typically triggers notification to the manager who authored the performance review. Following rejection, the manager can edit and resubmit the performance review for approval.

- **Release** - The manager can control when the review is available (released) to the employee. It is assumed that a face-to-face meeting will occur during which the review will be discussed.
- **Acknowledge** - The employee then acknowledges the review, confirming that the review meeting was held and providing final comments if applicable. The purpose of this step is to document the employee's confirmation that a formal review took place, and to allow the employee to document his/her own comments or feedback regarding the performance review. The employee's final comments are considered part of the performance review and should be available to the manager. In the event that the employee refuses to acknowledge the review, the system can be configured to allow a manager to indicate acknowledgment on behalf of the employee.
- **Close** - The Close step is always part of the review workflow. Once the final step of the review is completed, the system closes the review. The process then updates the employee's talent profile (provided the review has been configured in this manner).

Process Definition Parameter

A process definition parameter is a configuration setting defined for each task in the steps included in the workflow of a performance review.

Once the process definition steps have been selected, each task of the corresponding workflow can have specific settings, such as: the length of time allowed for completing the task; whether the task can be performed automatically or by a specified due date; indications of specific instructions or labels to be shown; whether email messages are sent when a task is assigned and completed. Depending on the task, the specified assignment or completion email is sent to the person responsible for completing the task.

The following tasks can be associated with the steps of the review workflow. The list also indicates to whom each task is assigned.

- Write Employee Evaluation - Manager
- Submit Employee Evaluation for Approval - Manager
- Reopen Employee Evaluation - Manager
- Update Employee Profile - Manager
- Release Employee Evaluation - Manager
- Meeting Comment Acknowledgment - Manager
- Acknowledge Meeting Comment - Employee
- Override Meeting Comment Acknowledgment - Manager
- Close Employee Evaluation - Manager
- Write Self-Evaluation - Employee
- Release Self-Evaluation - Employee
- Close Self-Evaluation - Employee

Automatic Reminders

The configuration capability to set up automatic reminders allows users to set up reminders for each review action within a given workflow. System Administrators can set review process reminders at any or all of the individual review

step/action levels within the workflow of a performance review. 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.

System Administrators will leverage the existing Notification functionality and create review requests, select the desired process definitions and then add reminders within the Notifications configuration section. As with Review Process notifications, the message template determines the structure of the email and the document contains the content. The template embeds the document and then the system attaches this to the reminder.

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.

Notification Configuration Section

Notifications are created during the process of creating a Review Request. When the Review Request is created, a configuration section specifically designed for configuring notifications and email reminder messages resides in the *Notifications* section of the Review Request.

There are three components to define: at what point in the process the notification is to be sent, how often it is to be sent, and which message template is to be used in the email.

> **Note:** For Performance Review automatic reminder correspondence, the "To:" field of the review reminder message template must include the following variable: {TaskParticipant.EmailAddress}. Otherwise the correspondence will not be sent.

Enhanced Process Definition Parameters Configuration Section

Within the Process Definition Parameters, the Notifications section exists solely for the purpose of sending the review/step status information to the Compensation system. This section is at the bottom of the list of Process Definition parameters, in keeping with the process flow.

Configuration

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.

Action	Navigation	Additional Details
Creating and configuring Automatic Notifications.	**Configuration > [Performance] > Administration > [Performance Reviews] > Review Cycles [Review Cycle Management]**	It is within the Performance Review Administration pages that Automatic Notifications are created, configured, deactivated, and so on.

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 and reads as follows, *"A large volume of email could be sent if task owners oversee large populations. To avoid generating high volumes of email for individual employees, notifications should not be configured for those tasks."* Also, the System Administrators are able to deactivate the reminder if the number of emails becomes cumbersome.

Viewing a Review Request

Viewing a review request is done as part of a review cycle and allows to view the review request's properties and related settings, process definition and review request groups.

To view a review request, you need an existing review cycle.

Configuration > **[Taleo Performance] Administration** > **[Performance Reviews] Review Cycles**

1. In the Review Cycle Management page, click the name of the review cycle associated to the review request to be viewed.
2. In the Review Cycle page, click the name of the review request to be viewed.
3. In the Review Request page, click on the Show link to see more information.

The selected review request information displays in the Review Request page.

Creating a Review Request

Creating a review request is crucial because this action determines when a review will be assigned, how the review will be processed, which review form will be used, who will be evaluated and how will approve the review. Review requests can be created for a specific group of people at a particular point in time (for example, when an off-cycle review is required).

The creation of a review request requires a review cycle to which the request is associated, and preferably, a review group to which the request is assigned.

Configuration > **[Taleo Performance] Administration** > **[Performance Reviews] Review Cycles**

1. In the Review Cycle Management page, click the name of the review cycle for which a review request is to be created.

2. In the Review Cycle page, click Create next to Review Requests.
3. In the Review Request Wizard page, specify the properties of the review request and then click Next.

   The value specified in the Request Name field is the review name displayed on the performance review form.
4. In the Settings page, specify the various permissions and options applicable to the request, as well as who can edit certain information of the Talent Profile by checking the appropriate options; then click Next.
5. In the Process Definition page, check the desired settings related to the employee contribution and to the possible overriding of employee acknowledgment and then select the workflow option that corresponds to the way in which the performance review is to be processed and click Next.
6. In the Process Definition Parameters page, indicate for each task whether the task is to be processed automatically, without any deadline, or based on a duration or a specific due date, specify whether you want to use the default or custom value for each button label, button tooltip and comment instructions displayed on the review and select, if desired, the correspondence templates used to send notifications when the task is assigned and/or completed. When all parameters have been specified, click Next.
7. On the Summary page, ensure that all the information is correct and complete and then click Finish to complete and save the review request. If any of the information is incorrect or incomplete, before clicking Finish, click the Previous and/or Next buttons, to return to a page and make your changes.
8. Back on the Review Request page, you will need to specify the approval workflow if an approval step is part of the process definition.

   Note that if approvers have been configured also at the review request group level, the review request group approval configuration will prevail.
9. In the Approval Configuration Management page, choose Add Roles or Add Users.
   - If you want to specify the approver based on his role, click Add Roles; in the Role Selector page, check all the roles that are to act as approvers and click Select.
   - If you want a specific user to be an approver, click Add Users; in the User Selector page, check all the user names you wish to have as approvers and click Select.
10. Back to the Approval Configuration Management page, you will find listed all the roles and/or users you have selected, which you can order as per the approval path to follow by using the Move Up and Move Down buttons.
11. If you want approvers to be entitled to adjust the review during approval, indicate it by checking the Calibrator checkbox.
12. Once all approvers have been set to your satisfaction, click Save.

When you have provided all the information related to the review request, you must activate the request to launch the assignment of the reviews.

Defining the Approver of a Performance Review

Defining the approvers of a performance review consist in selecting specific users or roles to be responsible for approving a group of performance reviews. The approvers are set as part of the review request or review request group when the process definition includes an approval task.

To be able to define the approvers of a performance review, the related review request must be Draft or Inactive.

Configuration > [Taleo Performance] Administration > [Performance Reviews] Review Cycles

1. In the Review Cycle Management page, click the name of the review cycle related to the review request for which the approvers are to be set.
2. In the Review Cycle page, click the name of the desired review request.
3. Depending on whether you want to set the approvers for an entire review request or prefer to have specific approvers for each review request groups, you perform the approval configuration differently.

Note that if approvers are configured at both the review request and review request group levels, the review request group approval configuration will prevail.

The Approval Configuration section is only available when the process definition includes an approval step.

4. In the Review Request or Review Request Group page, click Edit next to the Approval Configuration section title.

   When approval paths have been defined both at the review request and review request group, the approval set at the group level will prevail. Therefore, when set at the review request level, the approval path will apply to all groups, unless other specified at the group level.

5. In the Approval Configuration Management page, choose Add Roles or Add Users.
   - If you want to specify the approver based on his role, click Add Roles; in the Role Selector page, check all the roles that are to act as approvers and click Select.
   - If you want a specific user to be an approver, click Add Users; in the User Selector page, check all the user names you wish to have as approvers and click Select.
6. Back to the Approval Configuration Management page, you will find listed all the roles and/or users you have selected, which you can order as per the approval path to follow by using the Move Up and Move Down buttons.
7. If you want approvers to be entitled to adjust the review during approval, indicate it by checking the Calibrator checkbox.
8. Once all approvers have been set to your satisfaction, click Save.

When the review will be sent for approval, all the specified approvers will need to approve the review, according to the defined order.

Duplicating a Review Request

Duplicating a review request is done within a review cycle and is used to quickly create a new review request based on an existing one.

Any review request can be duplicated.

Configuration > [Taleo Performance] Administration > [Performance Reviews] Review Cycles

1. In the Review Cycle Management page, click the name of the review cycle associated to the review request to be duplicated.
2. In the Review Cycle page, under Review Requests, locate the review request to be duplicated and click Duplicate under Actions.

The duplicated review request displays in the list of review requests, in the Review Cycle page, with an automatically-generated number preceding the original code and shows a Draft status.

The duplicated review request can then be edited as needed and activated to make it available for selection in review request groups.

Editing a Review Request

Editing a review request allows to modify a review request's properties, settings and process definition as well as its associated review request groups.

A review request can only be edited if in a Draft or Inactive status and only if no reviews have been generated for that request.

Configuration > **[Taleo Performance] Administration** > **[Performance Reviews] Review Cycles**

1. In the Review Cycle Management page, select the name of the review cycle associated to the review request to be edited.
2. In the Review Cycle page, click the name of the review request to be edited.
3. In the Review Request page, click Edit next to the section where information is to be modified.
4. In the Review Request Editor page, make the desired changes.
5. Click Save.

The edited information is displayed in the Review Request page.

Once a review request has been edited, if it was not active, it will need to be activated. Editing a review request might also imply editing the review request groups.

Activating a Review Request

Activating a review request is used to change the status of a review request from Draft or Inactive to Active and is necessary for the review form to be assigned.

To activate a review request, its status must be Draft or Inactive.

Configuration > **[Taleo Performance] Administration** > **[Performance Reviews] Review Cycles**

1. In the Review Cycle Management page, click the name of the review request to be activated.
2. In the Review Request page, click Activate next to the title of the page.

The activated review request shows an Active status.

The activated review request can then be used and selected in review request groups.

Deactivating a Review Request

Deactivating a review request is used to change the status of a review request from Active to Inactive. It is important to note that inactive review requests cannot be used or selected.

To deactivate a review request, its status must be Active.

Configuration > **[Taleo Performance] Administration** > **[Performance Reviews] Review Cycles**

1. In the Review Cycle Management page, click the name of the review request to be activated.
2. In the Review Request page, click Activate next to the title of the page.

The deactivated review request shows an Inactive status and is no longer available for selection in the related review request groups. When a review request is deactivated, no review form can be assigned to any employee.

The deactivated review request will need to be reactivated if needed to be available for selection in review request groups.

Deleting a Review Request

Deleting a review request is done to eliminate completely a review from a review cycle.

To delete a review request, its status must be Draft or Inactive and the review request CANNOT be in use in a review request group or attached to an employee review. The review request might therefore need to be deactivated beforehand and the related review request groups deleted.

Configuration > [Taleo Performance] Administration > [Performance Reviews] Review Cycles

1. In the Review Cycle Management page, click the name of the review cycle associated to the review request to be deleted.
2. In the Review Cycle page, under Review Requests, locate the review request to be deleted and click Delete under Actions.

   The Delete button is only displayed when the status is Draft or Inactive.

The deleted review cycle no longer displays in the list of review requests.

Review Request Fields

All fields related to Review Requests are presented in the table below, along with a description and possible values, when predefined. Each field also indicates the type of information it applies to and the related header.

Field	Description	Applicable to	Header
Acknowledge - Employee section	Configuration of the step where the employee must acknowledge the review meeting.	Review Requests	Process Definition Parameters
acknowledgment - Manager Override section	Configuration of the step where the manager must acknowledge overrides to the review.	Review Requests	Process Definition Parameters
acknowledgment Step	Step category related to the acknowledgment of the review, either for requesting or confirming acknowledgment.	Review Requests	Process Definition Parameters
Allow Employee Access to Writing Assistant	Setting that indicates if the employee will have access to the writing assistant when entering self-assessment comments. The writing assistant is only offered for Competency type sections. The suggested comments are taken from the guidance plans.	Review Requests	Settings
Allow employee collaboration in the main review	When there is employee contribution, setting that indicates that both the employee and the manager will collaborate in writing the main review; no separate self-assessment form is completed by	Review Requests	Process Definition

Field	Description	Applicable to	Header
	the employee. When this setting is active, you also need to specify which of the employee or the manager will be the initial writer.		
Allow employee to fill self-assessment	When there is employee contribution, setting that indicates if that the employee will complete a self-assessment. If this setting is checked, the corresponding tasks will be part of the Process Definition tasks.	Review Requests	Process Definition
Allow Manager to Cancel Review	Setting that indicates if the manager is allowed to cancel an employee's review. When this setting is checked, the related action will be available to the manager when completing an employee review.	Review Requests	Settings
Allow Manager to Override Employee acknowledgment	Setting that indicates if the manager is allowed to acknowledge a review on behalf of a direct report. This setting is often allowed in the case where an employee would refuse to acknowledge a review.	Review Requests	Process Definition
Allow Manager to Restart Review Workflow	Setting that allows the manager to restart en employee's review, that is to sent the review back to the employee for completion. The action performed by the manager is called 'Send Review Back to Employee' and is available 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.	Review Requests	Settings
Allow Manager to Transfer Review	Setting that indicates if the manager is allowed to transfer an employee's review to another evaluator. When this setting is checked, the related action will be available to the manager when completing an employee review.	Review Requests	Settings
Allow Multi-Rater	Setting that indicates if the manager will be allowed to request additional raters to assist in the review when writing an employee's review. When this setting is checked, the related action will be available to the manager when completing an employee review. **If this option is selected, the sub-	Review Requests	Settings

Field	Description	Applicable to	Header
	setting - **Allow multi-raters not only to comment, but also to rate items** - will need to be defined in order determine whether the additional raters are entitled to provide a rating in addition to their comment.		
Allow multi-raters not only to comment, but also to rate items	When the **Allow Multi-Rater** setting is enabled, this sub-setting provides the ability to allow the additional raters to provide a rating in addition to their comment.	Review Requests	Settings
Approval Step	Step category related to all review approval steps.	Review Requests	Process Definition Parameters
Approver Name	Name of the approver that participates in the review approval. The approvers are listed as per the approval order. The Approval Configuration section is only shown when the process definition includes an approval step. If approvers have also been configured in the review request group, the review request group configuration will prevail.	Review Requests	Approval Configuration
HR Administrator's approval task to be send only to the Request Administrator	When this checkbox is selected, tasks are directed to only the review request owners who are also HR Administrators.	Review Requests	Approval Configuration
Assignment Correspondence	Message template to be used to send an email message upon assignment of a specific task of the process. The correspondence is sent to the participant, which is the person responsible for completing the related task. The selection is done from a list of existing message templates. The default person to whom the message is sent depends on the task and is set as follows: • Write Employee Review - Manager • Write Self-Assessment - Employee • Release Employee Review - Manager • Request acknowledgment - Employee • acknowledgment - Manager or Employee • Submit for Approval - Manager	Review Requests	Process Definition Parameters

Field	Description	Applicable to	Header
	• Decide on Approval - Manager or HR Administrator • Reopen for Approval - Manager • Close Employee Review - Manager		
Automatic	Checkbox option that indicates if the related task of the process is done automatically when the previous task is completed. When Automatic is checked, all other task related parameters are made inactive and cannot be defined. However, when not checked, the user must manually specify the task parameters, by either choosing the provided default value or by entering a custom value.	Review Requests	Process Definition Parameters
Button Label	Text field used for specifying the text to be displayed on the task button shown on the review form. This text serves as an indication of the task to be completed. You can choose the provided default label or specify a custom value.	Review Requests	Process Definition Parameters
Button Tooltip	Text field used for specifying instructions for the task to be completed. The tooltip is shown as an info bubble when hovering over the task button. You can choose the provided default tooltip or specify a custom value.	Review Requests	Process Definition Parameters
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 access to performance reviews.	Review Requests	Properties
Calibrator	Checkbox that indicates if the approver also acts as a calibrator, meaning that he/she can edit the review while approving it. The Approval Configuration section is only shown when the process definition includes an approval step.	Review Requests	Approval Configuration
Close Employee Review	Configuration of the step where the review is closed.	Review Requests	Process Definition Parameters
Closing Step	Step category related to the closing of the review.	Review Requests	Process Definition Parameters

Field	Description	Applicable to	Header
Code	Unique alpha-numerical code used to identify a given element (review, definition, section, item, cycle, request, text). In a listing, the code is usually shown along with the name.	Review Requests	Properties
Comment Box Instruction	Text field used for specifying the instructions shown when the comment window is displayed upon completion of a task. You can choose the provided default instruction or specify a custom value.	Review Requests	Process Definition Parameters
Completion Correspondence	Message template to be used to send an email message upon completion of a specific task of the process. The correspondence is sent to the owner of the task, which is the person to whom the completed task is addressed to. The selection is done from a list of existing message templates. The default person to whom the message is sent depends on the task and is set as follows: • Write Employee Review - HR Administrator • Write Self-Assessment - Manager • Release Employee Review - HR Administrator • Request acknowledgment - Manager • acknowledgment - HR Administrator • Submit for Approval - HR Administrator • Decide on Approval - HR Administrator • Reopen for Approval - HR Administrator • Close Employee Review - HR Administrator • Complete Revision - Manager	Review Requests	Process Definition Parameters
Deadline	Deadline type and value granted to complete the related task when the task is not executed automatically. Three possible types of deadline can be set:, from the date the task is assigned. If the task is set to be automatically executed, no deadline can be entered. Possible values are:	Review Requests	Process Definition Parameters

Field	Description	Applicable to	Header
	• No deadline - All approval tasks are assigned with no due date, therefore never causing any task to be overdue. • Duration - Each approval task is created with a due date calculated by adding the specified number of working days to the current date the task is assigned. • Due Date - Each approval task is created with the same due date as specified in the configuration. As such, each approver gets the same due date - which is undesirable if each one waits until the due date to execute the task.		
Decide on Approval	Configuration of the approval step where a decision has to be made as to the approval of the review.	Review Requests	Process Definition Parameters
Employee Contribution	Setting that indicates that the employee participates in the review process, either by completing a self-assessment or by collaborating with the manager in completing the main review.	Review Requests	Process Definition
Employee is the initial writer	Option that indicates that the employee will be the first one to write the review when both the employee and manager collaborate in the main review. The employee will send then send the review to his manager for completion.	Review Requests	Process Definition
Enforce Self-Assessment Submission Before Employee's Evaluation Completion	Setting that indicates if the employee has to complete his self-assessment before the manager can perform his review of the employee.	Review Requests	Process Definition
Include Mid-Year review	When selected 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.	Review Requests	Settings
Manager is the initial writer	Option that indicates that the manager will be the first one to write the review when both the employee and manager collaborate in the main review. The manager will send then send the review to the employee for completion.	Review Requests	Process Definition

Field	Description	Applicable to	Header
Message Template Selector	This determines which message is sent in a reminder email that is configured as a notification.	Review Requests	Notifications
Manager Review Assignment Date	Date on which the manager will be assigned the employee's evaluation.	Review Requests	Properties
Period Type	Period on which to base the review request (date range) or on a business period. If the business period is selected, after completing the review request wizard, the business period to be covered must be selected.	Review Requests	Properties
Process Definition	Workflow of the performance reviews that are associated to this request. Five different steps can be part of the workflow and can happen in different orders. The 5 different process steps are: • Draft - Mandatory step that is always performed first as it corresponds to the completion of the review - by the manager and/or the employee. • Calibrate - Optional step required for adding calibration to the performance review process. • Approve - Step that indicates that the review needs to be verified and approved. • Release - Step that indicates that the manager has the ability to decide when to expose the review to the employee, thus the ability to hold the review before releasing it. • Acknowledge - Step that indicates that the employee needs to acknowledge that a review meeting was held and where he can provide additional comments. • Close - Mandatory step that is always performed last as it corresponds to the closing of the review once it is completed.	Review Requests	Process Definition
Release Employee Review	Configuration of the step where the manager's review of the employee is released to the employee.	Review Requests	Process Definition Parameters

Field	Description	Applicable to	Header
Releasing Step	Step category related to the release of the review to the employee.	Review Requests	Process Definition Parameters
Reopen for Approval	Configuration of the approval step if the review is to be reopened.	Review Requests	Process Definition Parameters
Repeat	This setting defines how often a reminder email is to be sent. For example, *Every day* or *Every week* until the task is completed.	Review Requests	Notifications
Request ackkowledgment	Configuration of the step where an acknowledgment is requested.	Review Requests	Process Definition Parameters
Request Administrator	Name of the system administrator associated with the review request. This field is not actively used for the moment but is targeted for technical purposes like receiving review assignment errors.	Review Requests	Properties
Request Name	Alpha-numerical value indicating the name of the request. IMPORTANT - The request name is the one used and shown on the performance review form.	Review Requests	Properties
Review Period End Date	End date of the review period, which corresponds to the end date of the period under evaluation. By default, the End Date of the review cycle is entered.	Review Requests	Properties
Review Period Start Date	Start date of the review period, which corresponds to the start date of the period under evaluation. By default, the Start Date of the review cycle is entered.	Review Requests	Properties
Review Reference Date	Date used as the reference date on which employee information is drawn into the review form. All information presented in the review will be based on this date.	Review Requests	Properties
Review status from which update notifications start	This setting indicates at which step of the review process a notification will be sent to the Compensation application so that the updated review information from Performance can be exported to Taleo Compensation. This setting provides the ability for customers to configure the frequency of the review information updates for compensation purposes	Review Requests	Process Definition Parameters (Notifications)
Self-Assessment Assignment Date	Date on which the self-assessment will be assigned to the employee.	Review Requests	Properties
Status	Status of the selected element. Possible values are:	Review Requests	Properties

Field	Description	Applicable to	Header
	• **Draft** - When in a Draft status, an element can be viewed and edited but not applied or associated to another element. To be able to use a Draft element, it must first be activated. Once the status of an element has changed from Draft to another status, it can never be in a Draft status again. • **Inactive** - When in an Inactive status, an element can be edited or deleted but not applied or associated to another element. To be able to use an Inactive element, it must first be activated. The Inactive status is required to delete or edit any element • **Active** - When in an Active status, an element cannot be edited or deleted but can be applied and associated to another element. To edit an active element, it must first be deactivated.		
Submit for Approval	Configuration of the approval step where the review has to be sent for approval.	Review Requests	Process Definition Parameters
Type (of review request)	Type of the performance review request, which NEEDS TO MATCH the type of the review definition used in the request. The type specified is crucial as it determines the real review type. **Note that the Focal review is the one considered to be the official review. Furthermore, only focal type reviews are displayed in the user interface, in the Talent Profile and/or in the Team Review. Possible values are: • **Focal** - A focal review is the most typical type, where all employees are reviewed at the same time. • **Midyear** - A mid-year review serves as documented feedback that the manager gives to the employee for coaching or development purposes. A mid-year review is not an official review in that it is not used for compensation increases and personnel decision-making. Mid-year feedback forms often do not require approval	Review Requests	Properties

Field	Description	Applicable to	Header
	routings or employee self-evaluations. • **Quarterly** - A quarterly review serves as documented feedback that the manager gives to the employee for coaching or development purposes. A quarterly review is not an official review in that it is not used for compensation increases and personnel decision-making. Quarterly feedback forms often do not require approval routings or employee self-evaluations. • **Probationary** - A probationary review is usually done for newly hired employees, where they are reviewed shortly after beginning a new job, often 30, 60, or 90 days. Typically, probationary reviews are "course corrections" to provide feedback to the employee on his/her initial performance. This type of review may also be used to justify terminations. • **Performance Improvement Plan** - Performance Improvement Plans (PIPs) are generated for employees whose performance falls to an "unacceptable" level. The purpose of a PIP is to document the required level of performance the employee must achieve in order to maintain employment. PIPs are generally active for a short period of time (e.g., 60 days), and will contain goals with ratings similar to a performance review. Additionally, the PIP business process differs from the performance management business process in that a) there is no employee self-evaluation, and b) the PIP must be co-authored by the manager and HR before it can be shared with the employee.		
Update Competencies	Setting that indicates if the employee's talent profile will be updated upon completion of the performance review with the ratings provided for competencies	Review Requests	Settings - Talent Profile

Field	Description	Applicable to	Header
	by the manager and/or the employee.		
Update Languages	Setting that indicates if the employee's talent profile will be updated upon completion of the performance review with the ratings provided for languages by the manager and/or the employee	Review Requests	Settings - Talent Profile
Update Skills	Setting that indicates if the employee's talent profile will be updated upon completion of the performance review with the ratings provided for skills by the manager and/or the employee	Review Requests	Settings - Talent Profile
When	Defines when the reminder email is to be sent. For example, *After task is assigned* and *After task is due.*	Review Requests	Notifications
Write Employee Review	Configuration of the writing step where the employee must complete his/her self-assessment.	Review Requests	Process Definition Parameters
Write Self-Assessment	Configuration of the writing step where the manager must complete the employee's review.	Review Requests	Process Definition Parameters
Writing Step	Step category related to review writing, either for the employee or the manager.	Review Requests	Process Definition Parameters

Working with Review Request Groups

Review Request Group

A review request group is used to specify the review definition to be used as the review form and to specify the review group of employees to whom the reviews will be sent. Also, when an approval process is part of the process definition, the review request group holds the information about the approval and the names of the approvers.

The review request group is part of the review request, which in turn is defined within the review cycle. A review request can include multiple review request groups, which enables you to assign different review forms to different groups of employees within the same review cycle.

Viewing a Review Request Group

Viewing a review request group is done as part of a review request, for a given review cycle.

To view a review request group, you need an existing review cycle that includes a review request.

Configuration > **[Taleo Performance] Administration** > **[Performance Reviews] Review Cycles**

1. In the Review Cycle Management page, click the name of the review cycle associated to the review request group to be viewed.
2. In the Review Cycle page, click the name of the review request containing the review request group to be viewed.
3. In the Review Request page, click the code of the review request group to view.

The selected review request group information displays in the Review Request Group page and shows the review definition and the review group used to assign the related performance reviews.

Creating a Review Request Group

Creating a review request group is part of the review request and allows the user to specify the review definition to be used as the performance review and the review groups to which the performance reviews will be assigned to.

The creation of a review request group requires a review cycle with an existing review request to associate the request group to.

Configuration > **[Taleo Performance] Administration** > **[Performance Reviews] Review Cycles**

1. In the Review Cycle Management page, click the name of the review cycle for which a review request group is to be created.
2. In the Review Cycle page, click the name of the review request to which the new review request group will be associated.
3. In the Review Request page, click Create next to Review Request Groups.
4. In the New Review Request Group page, select the desired review definition and review group by clicking the corresponding Search buttons.
5. C lick Save to complete and save the review request group.
6. If the process definition includes an approval step, a new Approval Configuration section will be shown for you to specify the approvers if needed. To do so, click Edit next to the Approval Configuration section title.

   Note that if approvers have been configured also at the review request level, the review request group approval configuration will prevail.

7. In the Approval Configuration Management page, choose Add Roles or Add Users.
   - If you want to specify the approver based on his role, click Add Roles; in the Role Selector page, check all the roles that are to act as approvers and click Select.
   - If you want a specific user to be an approver, click Add Users; in the User Selector page, check all the user names you wish to have as approvers and click Select.
8. Back to the Approval Configuration Management page, you will find listed all the roles and/or users you have selected, which you can order as per the approval path to follow by using the Move Up and Move Down buttons.
9. If you want approvers to be entitled to adjust the review during approval, indicate it by checking the Calibrator checkbox.
10. Once all approvers have been set to your satisfaction, click Save.

The newly created review request group shows in the related Review Request page, under Review Request Groups.

Once a review request group has been created, it is possible to create another one if needed. When all request groups are defined, the related review request must be activated for the reviews to be assigned.

Editing a Review Request Group

Editing a review request group is done as part of the review request and is used to modify the review request group's properties and approval information if an approval step is part of the process definition.

To edit a review request group, the related review request Draft or Inactive. It is recommended however not to edit a review request or its underlying review request groups once the related performance reviews have been assigned, that is once the review request has been activated.

Configuration > **[Taleo Performance] Administration** > **[Performance Reviews] Review Cycles**

1. In the Review Cycle Management page, click the name of the review cycle for which a review request group is to be edited.
2. In the Review Cycle page, click the name of the review request related to the review request group to be edited.
3. In the Review Request page, click the code of the review request group to edit.
4. In the Review Request Group page, click Edit next to the title of the page.
5. In the Review Request Group Editor page, make the desired changes.
6. C lick Save to save the modified review request group.

The edited review request group information displays in the related Review Request Group page.

If the related review request was in a Draft of Inactive status, it will need to be activated for the reviews to be assigned.

Deleting a Review Request Group

Deleting a review request group is done to remove a review request group from a review request.

The review request group cannot be in use, as once used they cannot be deleted. If the related review request has no review request group attached, no performance review will be generated.

Configuration > **[Taleo Performance] Administration** > **[Performance Reviews] Review Cycles**

1. In the Review Cycle Management page, click the name of the review cycle for which a review request group is to be deleted.
2. In the Review Cycle page, click the name of the review request related to the review request group to be deleted.
3. In the Review Request page, locate the review request group and click Delete under Actions.

The deleted review request group no longer displays in the list of review request groups in the Review Request page.

Review Request Group Fields

Fields displayed in Review Request Groups 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
Approver Name	Name of the approver that participates in the review approval. The approvers are listed as per the approval order. The Approval Configuration section is only shown when the process definition includes an approval step. If approvers have also been configured in the review request, the review request group configuration will prevail.	Review Request Groups	Approval Configuration
Calibrator	Checkbox that indicates if the approver also acts as a calibrator, meaning that he/she can edit the review while approving it. The Approval Configuration section is only shown when the process definition includes an approval step.	Review Request Groups	Approval Configuration
Request Name	Alphanumeric value indicating the name of the request. **Important** - The request name is the one used and displayed on the performance review form.	Review Request Groups	Properties
Review Definition	Name of the review definition used as the performance review for the review request group. The value is selected from the Review Group Selector, which displays all active review groups.	Review Request Groups	Properties
Review Group	Code of the review group corresponding to the employees to whom the selected review definition will be assigned. The value is selected from the Review Definition Selector, which displays all active review definitions.	Review Request Groups	Properties

9 Goal Management Administration

Working with Business Themes

Business Theme

Business themes are the highest level of categorizing business goals in the Taleo Performance hierarchy. They are the first item created when creating a framework for goal setting. Themes will provide support for organizations that use Balanced Scorecards in that it will allow the categorization of goals and projects into specific scorecard categories such as financial, customer, and development.

Business themes are the first items created when creating a framework for goal setting. Themes are system-wide and are not associated to business groups. Business themes are not linked to a period. Business themes are less volatile that organizational goals. It is not anticipated that themes will change significantly from year to year. Theme content can be translated into multiple languages to support global organizations.

Viewing a Business Theme

Viewing a business theme is done to view information about a specific business theme.

Configuration > **[Performance] Administration** > **[Goals Management] Business Themes**

1. In the Business Theme Management page, click the name of the business theme to be viewed.

Once in view mode in the Business Theme page, the business theme can be edited, duplicated, activated, deactivated or deleted, depending on its status.

Creating a Business Theme

Creating a business theme is used to create themes to which can be aligned business goals in Performance.

Configuration > **[Performance] Administration** > **[Goals Management] Business Themes**

1. In the Business Theme Management screen, click Create next Business Themes.
2. In the New Business Theme page, specify the properties of the new business theme.
3. Click Save.

The new theme shows in the Business Theme page, with a Draft status.

The theme needs to be activated to be available in Taleo Performance when selecting a theme for a business goal.

Duplicating a Business Theme

Duplicating a business theme is used to create a new business theme based on an existing one.

Any business theme can be duplicated, whatever its status.

Configuration > **[Performance] Administration** > **[Goals Management] Business Themes**

1. In the Business Theme Management page, locate the business theme to be duplicated.
2. Click Duplicate under Actions.

A new Business Theme page shows all the same information as the original business theme, except for the status, which is Draft, and the code, which is preceded by an automatically generated number.

The duplicated business theme can then be edited, if needed, and activated to make it available in Performance.

Editing a Business Theme

Editing a business theme is done to modify the properties of an existing business theme.

Any business theme can be edited, whatever its status.

Configuration > **[Performance] Administration** > **[Goals Management] Business Themes**

1. In the Business Theme Management page, click the name of the business theme to be edited.
2. In the Business Theme page, click Edit next to Properties.
3. In the Business Theme Editor page, make the desired changes.
4. Click Save.

The changes made are applied and reflected automatically in Performance.

If the business theme is in a Draft status, it will need to be activated to make it available for selection when aligning a business goal in Performance.

Activating a Business Theme

Activating a business theme is used to change the status of a business theme from Draft to Active in order to make the business theme available for selection in Performance when aligning business goals.

Configuration > **[Performance] Administration** > **[Goals Management] Business Themes**

1. In the Business Theme Management page, locate the business theme to be activated.
2. Click Activate under Actions.

The Business Theme Management page is refreshed and shows the status of the business theme as Active.

If you no longer want a business theme to be available in Performance, you need to deactivate it.

Deactivating a Business Theme

Deactivating a business theme is used to prevent a business theme to be available in Performance when aligning a business goal.

The business theme cannot be associated with a business goal.

Configuration > **[Performance] Administration** > **[Goals Management] Business Themes**

1. In the Business Theme Management page, locate the business theme to be deactivated.
2. Click Deactivate under Actions.

The Business Theme Management page is refreshed and shows the status of the business theme as Inactive.

To make a business theme available again in Performance, you need to activate it.

Deleting a Business Theme

Deleting a business theme is used to definitely remove a business theme.

Only business themes in a Draft status can be deleted. Furthermore, once a business theme has been activated, it cannot be deleted as it cannot return to a Draft status.

Configuration > **[Performance] Administration** > **[Goals Management] Business Themes**

1. From the Business Theme Management page, locate the business theme to be deleted.
2. Click Delete under Actions.
3. Click Yes when prompted to confirm deletion.

The Business Theme Management page no longer show the business theme.

Business Theme Fields

All fields related to Business Themes are presented in the table below, along with a description and possible values, when predefined. Each field also indicates the type of information it applies to and the related header.

Field	Description	Applicable to	Header
Activate	This button activates an item in a listing page when it resides in “Inactive” or “Draft” status. Items in those statuses cannot be used by users in Performance Management until it is activated.	Business Elements	Business Themes
Code	This field is an internal code defined by an Administrator for a business theme when it was created.	Business Elements	Business Themes

Field	Description	Applicable to	Header
Deactivate	This button moves a business period from “active” to “inactive” status, in which it cannot be accessed by users.	Business Elements	Business Themes
Delete	This button deletes an item in the listing on the Business Themes Management page. Note: Business themes cannot be deleted once they are activated.	Business Elements	Business Themes
Duplicate	This button duplicates an item in the listing on the Business Themes Management page.	Business Elements	Business Themes
Language	This field displays a menu that allows the Administrator to select the language in which a business theme/period can be translated. Click “Refresh” to enable the reordering.	Business Elements	Business Themes
Name	This field displays the name the Administrator has given to a business theme when it was created.	Business Elements	Business Themes
Recently Viewed Items	This menu displays the pages in the Performance Management Administration that the current Administrator has viewed. It also includes links by which the Administrator can quickly return to those pages.	Business Elements	Business Themes
Refresh	Clicking this button allows the Administrator to change the order of listings by different criteria (See “Language” and “Refine By”) The “Refresh” button must be clicked to enable these changes by refreshing the display.	Business Elements	Business Themes
Refine By:	This field displays a pull-down menu that allows the Administrator to change the order in which a listing is displayed. Possible selections are:– All (Default) -Keyword– Status- LanguageClick “Refresh” to enable any changes you make in this field.	Business Elements	Business Themes
Status	This field displays the status of business themes or business periods. Possible values are “Draft” or “Inactive.” Active items can only be used in Performance Management by users when they are in “Active” status.	Business Elements	Business Themes

Working with Business Periods

Business Period

All goals defined within Performance are contained within a business period. A business period defines a specific period of time, with a start date and an end date and serves as a container that typically mirrors the time period in which the organization evaluates employees. It reflects the period in which the goals will be worked on, and in most cases, the goals are expected to be completed in that period. In some cases, a goal may span multiple periods.

The configuration of a business theme is composed of various steps:

- Define the dates included in the business period by entering start and end dates.
- Define a code for internal use to be associated with the business period.
- Change the business period's status from “draft” to “active.”
- Once business themes have been created and activated, Performance users can then map their goals to those periods.

Viewing a Business Period

Viewing a business period is used to view information about a specific business period.

Configuration > **[Performance] Administration** > **[Goals Management] Business Periods**

1. In the Business Period Management page, click the name of the period to be viewed.

Once in view mode in the Business Period page, the business period can be edited, duplicated, activated, deactivated or deleted, depending on its status.

Creating a Business Period

Creating a business period is used to determine the valid periods for establishing business goals within Performance.

Configuration > **[Performance] Administration** > **[Goals Management] Business Periods**

1. In the Business Period Management page, click Create next to Business Periods.
2. In the New Business Period page, provide the required information about the new business period.
3. Click Save.

The new business period shows in the Business Period page, with a Draft status.

The business period needs to be activated to make it available for selection in Performance's business goal functionality.

Duplicating a Business Period

Duplicating a business period is used to create a new business period based on an existing one.

Any business period can be duplicated, whatever its status.

Configuration > **[Performance] Administration** > **[Goals Management] Business Periods**

1. In the Business Period Management page, locate the business period to be duplicated.
2. Click Duplicate under Actions.

A new Business Period page shows all the same information as the original business period, except for the status, which is Draft, and the code, which is preceded by an automatically generated number.

The duplicated business period can then be edited, if needed, and activated to make it available in Performance.

Editing a Business Period

Editing a business period is done to modify the properties of an existing business period.

A business period can be edited only when it is deactivated. If a business period is activated, it can be deactivated up until the point at which the first business goal or employee goal plan is created in that business period. At that point, the business period cannot be deactivated, and therefore cannot be edited.

Configuration > **[Performance] Administration** > **[Goals Management] Business Periods**

1. In the Business Period Management page, click the name of the business period to be edited.
2. In the Business Period, click Edit next to Properties.
3. In the Business Period Editor page, make the desired changes.
4. Click Save.

The changes made to the business period are applied and reflected automatically in Performance.

If the business period is in a Draft status, it will need to be activated to make it available for selection in Taleo Performance.

Activating a Business Period

Activating a business period is used to change the status of a business period from Draft to Active in order to make the business period available for selection in Performance's business goal functionality.

Configuration > **[Performance] Administration** > **[Goals Management] Business Periods**

1. In the Business Period Management page, locate the business period to be activated.
2. Click Activate, under Actions.

The Business Period Management page is refreshed and shows the status of the business period as Active.

If you no longer want a business period to be available in Performance, you need to deactivate it.

Deactivating a Business Period

Deactivating a business period is done to prevent a business period to be available in Performance's business goal management functionality.

Configuration > [Performance] Administration > [Goals Management] Business Periods

1. In the Business Period Management page, locate the business period to be deactivated.
2. Click Deactivate under Actions.

The Business Period Management page is refreshed and shows the status of the period shows as Inactive.

To make a business period available again in Performance, you need to activate it.

Deleting a Business Period

Deleting a business period is used to definitely remove a business period.

Only business periods in a Draft status can be deleted. Furthermore, once a business period has been activated, it cannot be deleted as it cannot return to a Draft status.

Configuration > [Performance] Administration > [Goals Management] Business Periods

1. In the Business Period Management page, locate the business period to be deleted.
2. Click Delete under Actions.
3. Click Yes when prompted to confirm deletion.

The Business Period Management page no longer shows the business period.

Business Period Fields

All fields related to the Business Periods are presented in the table below, along with a description and possible values, when predefined. Each field also indicates the type of information it applies to and the related header.

Field	Description	Applicable to	Header
Activate	This button activates an item in a listing page when it resides in “Inactive” or “Draft” status. Items in those statuses cannot be used by users in Performance Management until it is activated.	Business Elements	Business Periods
Code	This field is an internal code defined by an Administrator for a business period when they were created.	Business Elements	Business Periods

Field	Description	Applicable to	Header
Deactivate	This button moves a business period from “active” to “inactive” status, in which it cannot be accessed by users.	Business Elements	Business Periods
Delete	This button deletes an item in a business period listing page. Note: A business period cannot be deleted once it is activated.	Business Elements	Business Periods
Duplicate	This button duplicates an item in a business period listing page.	Business Elements	Business Periods
End Date	This field displays the date on which a business period ends.	Business Elements	Business Periods
Language	This field displays a menu that allows the Administrator to select the language in which a business theme/period can be translated. Click “Refresh” to enable the reordering.	Business Elements	Business Periods
Name	This field displays the name the Administrator has given to a business theme or business period when it was created.	Business Elements	Business Periods
Recently Viewed Items	This menu displays the pages in the Performance Management Administration that the current Administrator has viewed. It also includes links by which the Administrator can quickly return to those pages.	Business Elements	Business Periods
Refresh	Clicking this button allows the Administrator to change the order of listings by different criteria (See “Language” and “Refine By”) The “Refresh” button must be clicked to enable these changes by refreshing the display.	Business Elements	Business Periods
Refine By:	This field displays a pull-down menu that allows the Administrator to change the order in which a listing is displayed. Possible selections are:– All (Default) -Keyword– Status- LanguageClick “Refresh” to enable any changes you make in this field.	Business Elements	Business Periods
Start Date	This field displays the date on which the business period begins.	Business Elements	Business Periods
Status	This field displays the status of business themes or business periods. Possible values are: - Draft- Inactive - Active Items	Business Elements	Business Periods

Field	Description	Applicable to	Header
	can only be used in Performance Management by users when they are in “Active” status.		

Working with Goal Plan Templates

Goal Plan Template

The goal plan template provides the ability to determine how both employee goals and competency goals are to be managed within the organization, the group of employees to whom the template applies, the information to be shown for employee goals and for competency goals - which can be different - the approval workflow for the goal plan, how goals are to be assigned and aligned and if instructions should be shown to users.

Enhancements

- With the introduction of competency goals, the goal plan template now provides settings to enable and configure competency goals within the employee goal plan.

Performance comes with a default goal plan template, which is used when no other template has been configured.

When more that one goal plan template is active, the one used is the template that is the most relevant for the user at the time of the goal plan creation, based on the organizations, locations, job fields and job levels.

Once a goal plan template has been created and has been used, it cannot be deleted. However, depending on the information, some changes within the goal plan template can be possible. When changes are made to an existing goal plan template, those changes will not apply if the goal plan has already been created; the modified goal plan template will only be used when a new goal plan is created, on the next business period.

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.	**Configuration > [Taleo Performance] Administration > [Global Configurations] Settings**
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.	**Configuration > [Taleo Performance] Administration > [Goals Management] Goal Plan Templates Configuration > [Taleo Performance] Administration > [Goals Management] Goal Plan Templates**
Allow subgoals	Set by default to No, this setting indicates if subgoals can be created under employee goals.	**Configuration > [Taleo Performance] Administration > [Goals Management] Goal Plan Templates Configuration > [Taleo Performance] Administration > [Goals Management] Goal Plan Templates**
Goal Alignment Settings	Group of settings indicating how employee goals can be aligned, and in which situations.	**Configuration > [Taleo Performance] Administration > [Goals Management] Goal Plan Templates Configuration > [Taleo Performance] Administration > [Goals Management] Goal Plan Templates**
Goal Assignment Settings	Group of settings indicating if employee and competency goals can be assigned and in which circumstances the assignment is possible.	**Configuration > [Taleo Performance] Administration > [Goals Management] Goal Plan Templates**

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
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

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**
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.	**Configuration** > **[Taleo Performance] Administration** > **[Goals Management] Goal Plan Templates**
Any selected User defined fields	Can be set to be editable, propagated and to require approval if edited.	**Configuration** > **[Taleo Performance] Administration** > **[Goals Management] Goal Plan Templates**

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.	**Configuration** > **[Taleo Performance] Administration** > **[Global Configurations] Settings**
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.	**Configuration** > **[Taleo Performance] Administration** > **[Goals Management] Goal Plan Templates** **Configuration** > **[Taleo Performance] Administration** > **[Goals Management] Goal Plan Templates**
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	**Configuration** > **[Taleo Performance] Administration** > **[Goals Management] Goal Plan Templates** **Configuration** > **[Taleo Performance] Administration** > **[Goals Management] Goal Plan Templates**

Configuration of the use of competency goals		
Setting	**Description**	**Location**
	might still be added if competency goals are allowed	
Goal Assignment Settings	Group of settings indicating if employee and competency goals can be assigned and in which circumstances the assignment is possible.	**Configuration** > **[Taleo Performance] Administration** > **[Goals Management] Goal Plan Templates**

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
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.	**Configuration** > **[Taleo Performance] Administration** > **[Goals Management] Goal Plan Templates**
Any selected User defined fields	Can be set to be editable, propagated and to require approval if edited.	**Configuration** > **[Taleo Performance] Administration** > **[Goals Management] Goal Plan Templates**

Sub-competency Goal

A sub-competency goal brings more details and descriptions on the competency goal. A sub- competency goal might be associated to the corresponding competency goal but it is possible to add additional descriptions/behaviors that are not part of the original competency.

A sub competency goal is not measured nor rated as opposed to employee goal task. A sub competency goal is limited to the description/behaviors field.

Configuration

Sub-competencies are available within competency goals when the competency goal configuration of the related goal plan template is defined to display sub-competencies.

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 by 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
Allow subgoals	Enables the ability to create sub-goals.	Goal Plan Template	**Configuration** > **[Performance] Administration** > **[Goals Management] Goal Plan Templates**

Goal Plan Approval Workflow

Approval workflow configuration allows to define the approval workflow of goal plans and is based on roles and HR administrator contextualization.

The approval workflow can be based on predefined roles and/or contain specific users.

The available roles are:

- Employee
- Manager
- 2nd Level Manager
- 3rd Level Manager
- 4th Level Manager
- HR Administrator

Furthermore, when the HR Administrator is part of the approval workflow, the applicable contexts can be defined for each. When such contextualization is set, all HR Administrators that are linked to a specific business object will have the related tasks assigned to them and any of these administrators will be able to accept or reject the assigned approval requests.

Goal Creation Through Alignment

The creation of employee or business goals though 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
Allow employees to align their employee goals to their manager's goals	Setting that indicates if employees are entitled to align their goals to their manager's goals.
Allow to align employee goals to projects	Setting that indicates if employees are entitled to align their goals to projects.
Allow to align employee goals to employee's business organization goals	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.
Allow to align employee goals to business goals of business organizations that are below the employee's business organization level	Sub-setting of **Allow to align employee goals to employee's business organization goals**
Allow to align employee goals to business goals of business organizations that are above the employee's business organization level	Sub-setting of **Allow to align employee goals to employee's business organization goals**

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	

Field	Copied?	Comment
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.	**Configuration** > **[SmartOrg] Administration** > **[Users] User Accounts**

User Type Permissions		
Permission Name	**Description**	**Location**
	If restricted managing permission is required, select the applicable constraints.	

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.
Achievable	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.
Relevant	This step allows the user to make their goal relevant by aligning it to a manager's goal or a business goal.
Time-bound	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.

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 goals using the SMART assistance, the corresponding goal plan template must be configured to allow such action.

Goal Plan Template configuration	
Setting Name	**Location**
Allow creating goals using the SMART assistant	**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**

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 assignation.
- 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
Allow manager to assign employee goals	Main goal assignment setting. This setting must first be enabled to allows managers to assign goals.
Add goal even if the employee's goal plan does not exist	Sub-setting that entitles the assignation of goals even when a goal plan has not yet been created.
Add goal even if the employee's goal plan is approved	Sub-setting that entitles the assignment of goals even if the goal plan has been approved.
Allow goal batch assignment to indirect reports	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.

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, the Tasks section is available for viewing.	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.

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

Standard Field in the Goal Plan Template	Applicable to tasks	Applicable to goals
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**.

Creating a Goal Plan Template

Creating a goal plan template allows to determine what types of goals are allowed in goal plan, what goal information is to be shown for employee goals and/or competency goals and to define the approval workflow of goals, the standard and custom fields to be displayed, edited, propagated and approved and the organizations, locations, job fields and job levels to which the template applies.

A default template is associated to all new goal plans if no other pertinent goal plan templates are created and activated.

Configuration > **[Performance] Administration** > **[Goals Management] Goal Plan Templates**

1. In the **Goal Plan Template Management** page, click Create next to **Goal Plan Templates**.
2. In the **New Goal Plan Template** page, enter the mandatory code and name of the new template and select the applicable rating model if needed.

   If you use multiple languages, you must provide a unique name for each active language.
3. If you want managers to be entitled to assign goals to their employees, under Goal Assignment Settings, select the related option and determine how goals are to be added.
4. If you want the goal plans to include employee goals and sub-goals, make sure to activate the related options under Employee Goals Settings.
5. If you want the goal plans to include competency goals, set the appropriate options under Competency Goal Settings.
6. Click **Save**.
7. In the specific **Goal Plan Template** page, specify all the information to be part of the new template, as needed.
   - Enter the text of the instructions to be shown to users when managing goals, if you want such instructions to display.
   - Specify the applicable context by adding the desired organizations, locations, job fields and/or job levels.
   - Specify the applicable approval workflow. For more information, see *Defining an Approval Workflow*Defining Workflow Approval.
   - Add custom fields if desired. For more information, see *Adding a User-defined Field to a Template*Adding a User Defined Field to a Template.

- Under Employee Goal Configuration and Competency Goal Configuration, specify the standard fields to be displayed on the goal plan for each type of goal allowed, which fields can be edited, which ones are propagated when a goal is assigned and which field changes need to be approved. For more information, see *Editing the Display of Standard Fields, Defining Goal Field Value Propagation and Defining Goal Field Changes Requiring Approval.*

8. Once all information has been provided and saved, there is no additional saving task required.

The newly created template displays in the **Goal Plan Template Management** page, under **Goal Plan Templates.**

Once created, the template needs to be activated. Once activated, it will be associated to new goal plans, as per the defined contexts (organizations, locations, job fields and/or job roles).

It is important to note that once a template is linked to a goal plan, it can no longer change. As such, new templates can only be associated to new goal plans.

Creating the Goal Instruction Text

Goal instructions are useful to provide users with some guidance on how to create and maintain employee goals. There is one instruction text per goal plan template.

Configuration > **[Performance] Administration** > **[Goals Management] Goal Plan Templates**

1. In the **Goal Plan Template Management** page, select the goal plan template for which you want to create or edit the instructions.
2. In the **Goal Plan Template** page, click **Edit** next to **Instructions**.
3. In the **Goal Plan Template Editor** page, enter the text you want to display as instructions and format it as needed using the available editing options.

   If you have multiple active languages, select a different language, click **Refresh**, and then enter the text. The base language will be used for any active languages you do not include instructions for.
4. Click **Save**.

The new instruction text, whether it was just created or edited, will be displayed the next time a user views a goal plan or goal page and selects to show the instructions.

Allowing Managers to Assign Goals

Allowing managers to assign goals directly to their employees is done as part of the goal plan template configuration.

Configuration > **[Performance] Administration** > **[Goals Management] Goal Plan Templates**

1. In the **Goal Plan Template Management** page, click the name of the template that corresponds to the goal plan for which you want to grant managers the permission to assign goals.
2. In the selected **Goal Plan Template** page, click **Edit** next to **Properties**.
3. Check the option **Allow manager to assign goals.**
4. As needed, check the options that indicate when goals are to be added in the specified conditions.
5. Click **Save**.

Managers accessing goal plans related to the template you just defined will see the Person with Right Arrow icon, which opens the **Goal Assignment** window allowing them to assign the currently selected goals to the selected employees.

Once the permission to assign goals has been granted, you need to specify which goal field values are to be propagated to the employee's goal when the goal is assigned.

Enabling Goal Creation by Copying Existing Goals

The user needs to have administrative security access, granted via **Performance** > **Administration** > **Allow system administration** .

Configuration > **[Taleo Performance] Administration** > **[Goals Management] Goal Plan Templates** - Goal Creation Options

1. In the **Goal Plan Template Management** page, select the desired goal plan template.
2. In the **Goal Plan Template** page, click **Edit** next to **Properties** to open the **Goal Plan Template Editor** page.
3. Scroll to the **Goal Creation Options** section and check **Allow creating goals by copying from previous goal plans**.
4. Click **Save**.

The goal plan template has the option to create goals by copy enabled. Any goal plan using this goal plan template will entitle users to create goals by copying existing goals.

Enabling the Goal Creation Assistant

The user needs to have administrative security access, granted via **Performance** > **Administration** > **Allow system administration** .

Configuration > **[Taleo Performance] Administration** > **[Goals Management] Goal Plan Templates** - Goal Creation Options

1. In the **Goal Plan Template Management** page, select the desired goal plan template.
2. In the **Goal Plan Template** page, click **Edit** next to **Properties** to open the **Goal Plan Template Editor** page.
3. Scroll to the **Goal Creation Options** section and check **Allow creating goals using the SMART assistant**.
4. If you want to provide specific instructions to users of the assistant, enter the instruction text in the **SMART Goal Creation Instructions** editor box. You can also insert hyperlinks to other documents providing additional information.

   This text will show in the left panel of the **Smart Goal Creation** window.
5. Click **Save**.

The goal plan template has the option to create SMART goals enabled. Any goal plan using this goal plan template will entitle users to create goals using the SMART assistant.

Defining an Approval Workflow

Defining an approval workflow provides the ability to determine who will approve a succession, goal or development plan and if more than one approver is set, in which order the approvals are performed and how many days they have to provide their feedback.

Approval path changes can be made at any time and are applied immediately, except for approvals that are currently started; these will be completed according to the initial path. It is important to know that approval paths apply to all

users, except HR administrators. HR administrators requesting approval bypass the normal path and get a pop-up asking them to specify the approval workflow.

Configuration > **[Performance] Administration** > **[Goals Management] Goal Plan Templates**

Configuration > **[Performance] Administration** > **[Development Planning] Default Development Plan Template**

Configuration > **[Performance] Administration** > **[Performance Reviews] Review Cycles**

1. Click Edit next to Approval Workflow and in the Approval Workflow Editor page, set up the approvers by doing any of the following:
   - Click Add Roles, select the required roles and click Select to insert them in the Approval Workflow list.
   - Click Add Users, select the required users and click Select to insert them in the Approval Workflow list.
   - To change the approval order, select Move Down or Move Up for the relevant user.
   - To change the Approval (Days), which is the number of working days the approver has to respond to an approval request, enter a whole number of one or more.
   - To remove roles or users from the approval workflow, select each unwanted user or role and click Remove.
2. If you want to send an email message to notify the approvers that an approval task was assigned to them or to notify the requester of the approval that the task was approved, rejected or terminated, specify the desired email message template by selecting it from the Message Template Selector.
3. Click Save.

All the user roles and/or users selected as approvers display under the Approval Workflow section of the corresponding template page.

Defining Which Fields to Display in the Goal Plan

The goal fields that are displayed in the goal plan for each goal are determined by the configuration of the standard and user-defined fields in the goal plan template.

Configuration > **[Taleo Performance] Administration** > **[Goals Management] Goal Plan Templates**

1. In the **Goal Plan Template Management** page, click the name of the template for which you want to define the display of goal information.
2. In the selected template page, select the **Show** option of either the **Employee Goal Configuration** or the **Competency Goal Configuration** section, depending of the type of goal.
3. Once the configuration section expanded, click **Edit** next to the **Standard Fields** section.
4. In the **Standard Field Availability Editor**, check or uncheck the fields to be displayed as well as those than can be edited, propagated and require approval when a change is made.
5. Once all desired fields are set to be displayed, click **Save**.
6. To display user-defined fields, use the **User-Defined Fields** section.
   a. To add a new custom field, click **Add** next to **User-defined Fields** and select the fields to add.
   b. By default, if you add a user-defined field, it will be displayed in the goal detail page. However, you can define whether the field will be editable, propagated and require approval. To change those options, click **Edit** next to the field to modify.

In the goal plan, each employee goal or competency goal page will show the fields as per defined in the goal plan template.

Editing the Display of Standard Fields in a Template

Editing the display of standard fields on a template allows the administrator to determine which standard fields are to be displayed on the associated employee goal plans or development plans.

Configuration > **[Performance] Administration** > **[Goals Management] Goal Plan Templates**

Configuration > **[Performance] Administration** > **[Development Planning] Default Development Plan Template**

1. In the **Goal Plan Template Management** or **Development Plan Template Management** page, click the name of the template for which you want to edit the display of standard fields.
2. In the selected template page, click **Edit** next to **Standard Fields**.
3. In the **Standard Field Availability Editor**, check or uncheck the fields to be displayed as well as those than can be edited.
4. Click **Save**.

The standard fields you have selected to be displayed will show on the employee goal plan or development plan.

Defining Goal Field Value Propagation

Defining goal field value propagation allows the administrator to define which information of the goal will be propagated when the goal is assigned to an employee.

Configuration > **[Performance] Administration** > **[Goals Management] Goal Plan Templates**

1. In the Goal Plan Template Management page, click the name of the template that corresponds to the goal plan from which goals are to be assigned.
2. Depending on the type of goal, click Show next to Employee Goal Configuration or Competency Goal Configuration.
3. Depending on whether the related field is standard or user-defined, use one of the following procedures:
    - In the selected Goal Plan Template page, click Edit next to Standard Fields. Then in the Standard Field Availability Editor, in the column Propagated, check or uncheck the fields for which you want the values to be propagated when a goal is assigned to an employee.
    - In the selected Goal Plan Template page, under the User-defined Fields section, click Edit next to field you wish to define. Then in the User-Defined Field Editor, check the Propagated option.
    - If you want to be able to automatically align vertically assigned goals - those from a manager to a direct or indirect report - you must ensure you select to propagate the Alignment field.
4. Click Save.

All the values entered in the manager's goal for the fields that are set to be propagated will be copied to the employee's goal when assigned.

Defining Goal Field Changes Requiring Approval

Defining goal field changes requiring approval allows the administrator to define what change to the goal plan values need to be approved, and therefore setting the goal plan to a Not Approved status.

Configuration > [Performance] Administration > [Goals Management] Goal Plan Templates

1. In the Goal Plan Template Management page, click the name of the template that corresponds to the goal plan for which you want to define the goal changes needing approval.
2. Depending on the type of goal, click Show next to Employee Goal Configuration or Competency Goal Configuration.
3. Depending on whether the field is standard or user-defined, use one of the following procedures:
   - In the selected Goal Plan Template page, click Edit next to Standard Fields. Then in the Standard Field Availability Editor, in the column Requires Approval, check or uncheck the fields that need approval when a change is made to its value.
   - In the selected Goal Plan Template page, under the User-defined Fields section, click Edit next to field you wish to define. Then in the User-Defined Field Editor, check the Requires Approval option.
4. Click Save.

Whenever a change is made to one of the goal field that has been set to require approval, the goal plan will return to a Not Approved status.

Editing Goals During the Approval Process

Goal plan approvers can modify goal plans that have an Approval in Progress status.

When the configuration setting is enabled, the current approver for the goal plan can make changes to those fields, as well as add and delete goals, without affecting the approval process. 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 work added.

Configuration

Configuration > [Performance] Administration > [Goal Management] Goal Plan Templates > *Template Name*		
Name	**Description**	**Location**
Allow current approver to modify the goal plan under approval	This enables an approver to modify, add, or delete goals for a goal plan thats status is under approval.	**Properties > Goal Approval**

Editing a Goal Plan Template

Editing a goal plan template is used to modify a template's properties, contexts of use, approval workflow and custom and standard fields. The information that can be modified depends on the status of the template and whether it is in use. It is important to know that a goal plan is assigned a template at the time of the creation of a goal plan and that once assigned, the plan retains that exact template for life.

If the template is in a Draft or Inactive status, all information can be modified. However, if the template is already used by a goal plan, only a few changes are possible:

- approval workflow can be changed
- additional standard fields can be made visible
- custom fields can be added, reordered and the UI component changed

If editing is not possible, a message will be displayed to inform you.

Configuration > **[Taleo Performance] Administration** > **[Goals Management] Goal Plan Templates**

1. In the Goal Plan Template Management page, click the name of the template you want to edit.
2. Depending on the status and use of the template, make the necessary changes in the appropriate sections.

The changes are reflected automatically in their respective sections and will be applied to all new corresponding goal plans that are created.

If the template is in Draft status, you will need to activated it for it to be applied to new goal plans.

Creating a User-Defined Field

Creating a user-defined field allows an organization to create and define company specific information that can later be added to various contexts, according to the context for which it was created.

Configuration > **[Performance] Administration** > **[Performance Reviews] User-defined Fields**

Configuration > **[Performance] Administration** > **[Goals Management] Employee Goal User-defined Fields**

Configuration > **[Performance] Administration** > **[Goals Management] Competency Goal User-defined Fields**

Configuration > **[Performance] Administration** > **[Employee Management] Employee Information User-Defined Fields**

Configuration > **[Performance] Administration** > **[Employee Management] Employee Metrics User-Defined Fields**

1. In the User-Defined Field page of the selected context, click Create next to the User-Defined Fields header.
2. In the New User-Defined Field page, specify the properties of the new field.

   Note that once created and saved, only the name can be edited.

   Also, if more than one language has been configured, a name will be required for each language before saving is allowed.
3. Click Save.

The new field displays in the list of User-Defined Fields and is available for selection.

Once created, the user-defined field can be added to a review's custom section, to a goal plan or development plan template or to the Talent Profile form, depending on the type of field created.

Creating a User-Defined Selection List

Creating a user-defined selection list allows system administrators to create additional selection lists having a set of user-defined values (or elements.) The selection list may be later used to define a user-defined field. This functionality can be used in performance reviews, goals plans, development plans or in the employee management section of the Talent Profile.

Configuration > **[Performance] Administration** > **[Global Configurations] User-defined Selections**

Configuration > **[Performance] Selection Lists**

1. In the User-Defined Selections page, click Create next to Selections.
2. In the New User-Defined Selection page, specify the properties for the new selection.
3. Click Save.
4. In User-Defined Selection page, click Create next to Elements to define the elements of the list.
5. In the New Element page, specify the properties of the new element.
6. Repeat steps 4 and 5 for each element composing the selection list.

The new selection list name displays and is available for use in the list of domain fields when creating user-defined fields.

Once the properties are created, you must activate at least one value (element) to then activate the selection for the newly created selection list to be available as a user-defined field to be added in custom sections of performance reviews, goal plans, development plans and the employee management section of the Talent Profile.

Adding a Custom Field to a Template

Adding a user-defined field to a template provides the ability to incorporate additional information in an employee goal plan or development plan.

To be able to add a user-defined field to a template, the field must have been previously created as a employee goal or development activity user-defined field.

Furthermore, the plan template must be in Draft or Inactive status to allow the addition.

Configuration > **[Performance] Administration** > **[Goals Management] Goal Plan Templates**
Configuration > **[Performance] Administration** > **[Development Planning] Default Development Plan Template**

1. Depending on the template, do one of the following:
   - In the **Goal Plan Template Management** page, click the name of the template to which you want to add a field and then in the Goal Plan Template, click Show next to Employee Goal Configuration or Competency Goal Configuration and then click **Add** next to **User-defined Fields**.

     In **Default Development Plan Template** page, click Add next to User-defined Fields.
2. In the **User-Defined Field Selector**, select the fields to be added.
3. Click **Select**.

The newly added fields display in the **Goal Plan Template Management** or **Default Development Plan Template** page, under **User-defined Fields**.

Once added, and ONLY if not already in use in the template, can the user-defined field information be edited.

Editing a Template Custom Field

Editing a template custom field consists in modifying the editable status, the UI component and the number of lines if the field is presented as a text area.

For all information to be editable, the related template must be in Draft or Inactive status or not used if in Active status. Therefore, if the related goal plan template is active and already used by a goal plan, you can only change Text Area and Text Input type fields by modifying the UI component and the number of lines in the text area.

Configuration > **[Performance] Administration** > **[Development Planning] Default Development Plan Template**

1. In the Goal Plan Template Management page, click the name of the template for which you want to edit a custom field.
2. In the selected Goal Plan Template page, under Custom Fields, click Edit next to the specific custom field to edit.

   The Edit option is only offered for Text Area and Text Input fields when the template is active and in use.
3. In the Custom Field Editor, edit the UI component as desired, and the number of lines if applicable.
4. Click Save.

The changes are reflected automatically and will be applied to new goal plans associated to the related goal plan template.

Reordering Template Custom Fields

Reordering template custom fields allows to change the order in which custom fields are displayed on the goal plan.

The order of custom fields can be changed anytime, whether the template is in Draft or Active status and whether it is used or not.

However, for the Reorder option to be available, there needs to be at least tow custom fields.

Configuration > **[Performance] Administration** > **[Goals Management] Goals Plan Template**

1. In the Goal Plan Template Management page, click the name of the template for which you want to change the order of custom fields.
2. In the selected Goal Plan Template page, click Reorder next to Custom Fields.
3. In the Reorder Custom Fields page, select a field and use the direction arrows to move the field to the desired position.
4. Repeat for each field to be moved.
5. Once all fields are presented in the desired order, click Save.

In the Goal Plan Template page, under Custom Fields, the fields are presented according to the new order.

Activating a Goal Plan Template

Activating a goal plan template makes the goal plan template applicable and usable when a new goal plan is created.

If the template is in a Draft or Inactive status, all information can be modified. However, if the template is already use by a goal plan, only a few changes are possible:

- approval workflow can be changed
- additional standard fields can be made visible
- custom fields can be added, reordered and UI component changed

If editing is not possible, a message will be displayed to inform you.

Configuration > [Performance] Administration > [Goals Management] Goal Plan Templates

1. In the **Goal Plan Template Management** page, click the name of the template you want to edit.
2. Depending on the status and use of the template, make the necessary changes in the appropriate sections.

The changes are reflected automatically in their respective sections and will be applied to all new corresponding goal plans that are created.

If the template is in Draft status, you will need to activated it for it to be applied to the goal plans of employees who correspond to the defined context.

Goal Plan Template Fields

Fields related to goal plan templates in Performance Administration 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 Value	Field that is part of the Measurement section that indicates, for the quantitative option, the actual completion of the goal, which is expressed as a number with or without decimals. Combined with the Target Value, it allows to calculate the Progress percentage of the goal.	Goal Plan Templates	Standard Fields
Add Competencies from Job Role on Goal Plan Creation	Setting that indicates if competencies in the related job role are to be automatically added to the employee's goal plan upon creation of the goal plan. For this setting to be set, Allow Competency Goals must first be enabled.	Goal Plan Templates	Properties
Add goal even if the employee's goal plan does not exist	Option that is offered only when the option to grant managers the right to assign goals is selected. This option indicates that the goal is added to the employee's goal plan even if a plan has not yet been created. In this situation, a goal plan will be created with the first goal that is assigned.	Goal Plan Templates	Goal Assignment Settings
Add goal even if the employee's goal plan is approved	Option that is offered only when the option to grant managers the right to assign goals is selected. This option indicates that the goal is added to the employee's goal plan even if the plan has already been approved. In this situation, the goal plan will need to be approved again by going through the defined approval workflow.	Goal Plan Templates	Goal Assignment Settings
Add Users	Link opening the User Selector to choose specific users to include in the approval workflow.	Goal Plan Templates	Approval Workflow Editor
Alignment	Section that contains goal alignment information, like the goals that are aligned to the current goal and the goals that are aligned to the current employee. This section displays in the employee goal detail page.	Goal Plan Templates	Standard Fields
Allow Competency Goals	Setting that determines if competency goals are to be part of employee goal plans. If so, these goals will be found under the Competencies tab. Competency goals are not enabled by default; however, at least of type of goal needs to be included in goal plan, either employee goals or competency goals, or both.	Goal Plan Templates	Properties
Allow creating goals by copying from previous goal plans	Setting that allows users to create new goals by copying them from previous goal plans.	Goal Plan Templates	Goal Creation Options

Field	Description	Applicable to	Header
Allow creating goals using the SMART assistant	Setting that allows users to create new goals by going through a step-by-step creation assistant.	Goal Plan Templates	Goal Creation Options
Allow current approver to modify the goal plan under approval	This enables the current approver to modify, add, or delete goals for a goal plan that has a status of under approval. This is beneficial in an approval workflow that only has one approver, as requiring the approval process to restart to change some fields will only return the goal plan back to this same approver who initiates the changes.	Goal Plan Templates	Goal Approval
Allow Employee Goals	Setting that determines if employee goals are to be part of employee goal plans. If so, these goals will be found under the Goals tab. Employee goals are not enabled by default; however, at least of type of goal needs to be included in goal plan, either employee goals or competency goals, or both.	Goal Plan Templates	Properties
Allow employees to align their employee goals to their manager's goals	Setting that provides the ability to give employees the permission to align their goals to the goals of their manager.	Goal Plan Template	Goal Alignment Settings
Allow goal batch assignment to indirect reports	Setting that provides the ability to assign goals to indirect reports, that being the direct reports of direct reports.	Goal Plan Templates	Goal Assignment Settings
Allow manager to assign goals	Option that indicates if managers are entitled to create goal plan for their employees by assigning them goals.	Goal Plan Templates	Goal Assignment Settings
Allow subgoals	Setting that indicates whether sub-goals can be created for goals. By default, sub-goals are not allowed. If tasks are to be allowed, it is recommended not to use sub-goals as well as it could be confusing for users to have both. Sub-goals only apply to employee goals. While business goals can be aligned, they cannot have sub-goals.	Goal Plan Templates	Properties
Allow to align employee goals to business goals of business organizations that are above the employee's business organization level	Setting used to give employees the permission to align their goals to the business goals of all business organizations that are above the level of the business organization they belong to.	Goal Plan Template	Goal Alignment Settings
Allow to align employee goals to business goals of business organizations that are below the employee's business organization level	Setting used to give employees the permission to align their goals to the business goals of all business organizations that are below the level of the business organization they belong to.	Goal Plan Template	Goal Alignment Settings
Allow to align employee goals to employee's business organization goals	Setting used to give employees the permission to align their goals to the business goals of business organization they belong to.	Goal Plan Template	Goal Alignment Settings
Allow to align employee goals to projects	Setting used to give employees the permission to align their goals to projects, either their own or those of their manager.	Goal Plan Template	Goal Alignment Settings
Approval (Days)	Number of days provided to the selected approver to perform the goal plan approval once the approval has been requested. By default, one day is provided.	Goal Plan Templates	Approval Workflow

Field	Description	Applicable to	Header
Approval Workflow	Section that list all selected roles and/or users to be part of the approval workflow for goal plans. In Edit mode, the approvers can be reordered as desired using the up and down arrows.	Goal Plan Templates	Approval Workflow
Approver Name	Lists the defined roles and/or users responsible for the approval of goal plans, in the applicable order.	Goal Plan Templates	Approval Workflow
Assignment Correspondence	Field that indicates the message template to use when an approval task is assigned.	Goal Plan Templates	Approval Workflow
Available Roles	List of all the roles that are available for approving goal plans.	Goal Plan Templates	Approval Workflow Editor
Code	Code of the goal plan template.	Goal Plan Templates	Properties
Comments	Section that allows employees and managers to enter comments about the goal. Goal comments can also be edited and removed by the user who originally entered the comment.	Goal Plan Templates	Standard Fields
Competency Goal Configuration	Section used to configure how standard and user-defined fields are to be managed for competency goals (displayed, editable, propagated, approved).	Goal Plan Templates	
Completion Correspondence - Approval	Field that indicates the message template to use when an approval process is completed by an approval.	Goal Plan Templates	Approval Workflow
Completion Correspondence - Rejection	Field that indicates the message template to use when an approval process is completed by a rejection.	Goal Plan Templates	Approval Workflow
Completion Correspondence - Termination	Field that indicates the message template to use when an approval process is terminated.	Goal Plan Templates	Approval Workflow
Critical	Field that indicates whether the achievement of the goal is critical or not. This field displays in the Specifications section of the goal detail page.	Goal Plan Templates	Standard Fields
Default Goal Measurement Type	Default measurement type used upon goal creation, which can either be Quantitative or Qualitative. The type can later be edited if needed.	Goal Plan Templates	Properties
Default Task Measurement Type	Default measurement type used upon task creation, which can either be Quantitative or Qualitative. The type can later be edited if needed	Goal Plan Templates	Properties
Description	Field that shows the description of the goal plan. This field displays in the Specifications section of the goal detail page. The character limit is 4000.	Goal Plan Templates	Standard Fields
Displayed	Option that indicates whether the field is to be displayed on the goal detail page.	Goal Plan Templates	Standard Fields
Due Date	Field that indicates the date scheduled for the goal to be achieved.	Goal Plan Templates	Standard Fields
Editable	Option that indicates whether the field can be edited by the user or read-only.	Goal Plan Templates	Standard Fields
Editable	Option that indicates whether the field can be edited by the user or read-only.	Goal Plan Templates	User-defined Fields
Editable	Option that indicates whether the field can be edited by the user or read-only	Goal Plan Templates	User-defined Fields
Employee Goal Configuration	Section used to configure how standard and user-defined fields are to be managed for employee goals (displayed, editable, propagated, approved).	Goal Plan Templates	

Field	Description	Applicable to	Header
Employee Rating	Field that provides the ability for an employee to enter a rating for the goal. The employee's rating is visible to the manager, but not editable. This field displays in the Rating section.	Goal Plan Templates	Standard Fields
External Identifier	Field that provide the ability to define an ID for the goal. When used, it can be leveraged for integrations in order to better support the import of goal information from a third party application or data source. When active, it displays in the Specifications section of the goal detail page. By default, this field is not displayed. The identifier does not need to be a completely unique value in the system but must however be unique for the employee within a given goal period.	Goal Plan Templates	Standard Fields
Include in Performance Review	Field that indicates that the goal will be included in the performance review. This setting is deselected by default for all conditions, meaning that, by default, the field is not displayed on the employee goal detail page. However, when set to be displayed, the Include In Performance Review option is displayed and selected by default, meaning that the goal is automatically included in the employee's performance review when goals are populated from the goal plan.	Goal Plan Templates	Standard Fields
Instructions	Instructions that can be provided to display to users when they manage their goals.	Goal Plan Templates	Instructions
Language	Displays the list of active languages in which the goal plan name and instructions can be created in.	Goal Plan Templates	Properties, Instructions
Manager Rating	Field that provides the ability for a manager to enter a rating for the goal. The manager's rating is not visible to the employee. This field displays in the Rating section.	Goal Plan Templates	Standard Fields
Measurement Text	Entry box that displays in the Measurement section of the employee goal detail page, that contains information about goal measurement. The character limit is 1000.	Goal Plan Templates	Standard Fields
Measurement Type	Option menu links (*Show Target Values* and *Hide Target Values)* that display in the Measurement section of the Employee Goal Detail page that lets the user choose whether the goal is measured on a quantitative or qualitative level.	Goal Plan Templates	Standard Fields
Name	Name of a job field to which must correspond an employee for the goal plan template to apply.	Goal Plan Templates	Job Fields
Name	Name of a job level to which must correspond an employee for the goal plan template to apply.	Goal Plan Templates	Job Levels
Name	Name of a location to which must correspond an employee for the goal plan template to apply.	Goal Plan Templates	Locations
Name	Name of an organization to which must correspond an employee for the goal plan template to apply.	Goal Plan Templates	Organizations
Name	Name of the goal plan template.	Goal Plan Templates	Properties
Name	Name of a standard field.	Goal Plan Templates	Standard Fields
Name	Name of a user-defined field added to the goal plan template. To be added, a field must first have been created under User-Defined Fields, as an Employee Goal type field.	Goal Plan Templates	User-defined Fields
Owner	Name of the owner of the goal.	Goal Plan Templates	Standard Fields

Field	Description	Applicable to	Header
Progress	Field that indicates the progression percentage of the goal, based on the actual value over the target value.	Goal Plan Templates	Standard Fields
Propagated	Option that indicates whether the value of the field is to be propagated when the goal is assigned.	Goal Plan Templates	Standard Fields
Propagated	Option that indicates whether the value of the field is to be propagated when the goal is assigned.	Goal Plan Templates	User-defined Fields
Public	Field that indicates whether the goal is public or private. This field displays in the Specifications section of the goal detail page. When set to private, a goal cannot be seen by subordinates and therefore cannot be aligned to.	Goal Plan Templates	Standard Fields
Rating Model	Rating model used to evaluate goals when included in performance reviews.	Goal Plan Templates	Properties
Requires Approval	Option that indicates whether a change to the value of the field requires an approval. When required, the goal plan is set to Not Approved when a change is made.	Goal Plan Templates	Standard Fields
Requires Approval	Option that indicates whether a change to the value of the field requires an approval. When required, the goal plan is set to Not Approved when a change is made.	Goal Plan Templates	User-defined Fields
SMART Goal Creation Instructions	Editing zone provided to enter instructions to display in on each page of the SMART Goal creation assistant. The instructions can take the form of a text or even an hyperlink providing full instructions.	Goal Plan Templates	Goal Creation Options
Start Date	Field that indicates the date when the progression of the goal starts being calculated.	Goal Plan Templates	Standard Fields
Status	Status of the goal plan template, which can be Draft, Active or Inactive.	Goal Plan Templates	Properties
Status	Field that indicates the status of the goal, which can be: Not Started, In Progress, Completed or Canceled. This field displays on the goal detail page as well as on the goal list.	Goal Plan Templates	Standard Fields
Stretch Value	Field that indicates a stretch value for the goal. This field displays in the Measurement section. Therefore, for this field to be displayed, the Measurement section MUST also be displayed.	Goal Plan Templates	Standard Fields
Sub-competencies	Field that indicates if sub-competencies are to be displayed, edited, propagated and populated and if a change of this value will cause the goal plan to require approval.	Goal Plan Templates	Standard Fields
Sub-competencies	Field that indicates is sub-competencies are to be made available in the goal plan, when competency goals are allowed. If set to be displayed, a Sub-competencies section will be shown in the goal detail page.	Goal Plan Templates	Standard Fields
System Administrator Goal	Field that triggers the display of a notification in the goal detail page when the goal has been created via another application and imported into Performance. When a goal is tagged as a system administrator goal, it is not editable nor deletable in the goal plan, nor can it be assigned to employees by a manager.	Goal Plan Templates	Standard Fields
Target Value	Field that indicates the target value for the quantitative mode, that indicates the level of achievement set for the goal, expressed as a number with or without decimals. Used in combination with the Actual Value, is allows to calculate the Progress percentage.	Goal Plan Templates	Standard Fields
Task Weight	Field that indicates the weight of each task in a goal, when tasks are included.	Goal Plan Templates	Standard Fields

Field	Description	Applicable to	Header
Tasks	Field that indicates if tasks are to be made available in the goal plan, when employee goals are allowed. If set to be displayed, a Tasks section will be shown in the goal detail page. If tasks are used, it is recommended not to allow sub-goals, as to not confuse users.	Goal Plan Templates	Standard Fields
Type	Type of the user-defined field. Possible types are: Text, Boolean, Date and TimeZone, Date, Multilingual Text, Numerical and Text.	Goal Plan Templates	User-defined Fields
UI Component	Value that indicates the type of input, which can be: Text Input, Check Box, Date Input or Numerical Input, List, Check Box List.	Goal Plan Templates	User-defined Fields
Weight	Field that indicates the weight of the goal in relation to the other goals. Weights can be carried over to the performance review when goals are copied from the plan to the review. This field displays in the Rating section.	Goal Plan Templates	Standard Fields

10 Succession Planning Administration

Working with Succession Plan Templates

Default Succession Plan Template

The default succession plan template is the template used by default for succession plans and allows you to define an applicable approval workflow and succession matrices.

Performance comes with a default succession plan template, which is always used. When changed, the updated settings apply to all subsequently created succession plans.

The succession plan template is divided into three sections:

- The Properties section enables you to select who can be included in a succession plan.
- The Approval Workflow section is where you select which users are involved in the approval process and what levels of automated notifications are used.
- The Available Matrixes section is used to associate performance matrices with the succession plan.

Defining the Default Succession Plan Template

Defining the default succession plan template consists in specifying the applicable approval workflow and the associated succession plan matrices.

Configuration > [Performance] Administration > [Succession Planning] Default Succession Plan Template

1. In the Default Succession Plan Template Management page, you can do the following:
    - Set the properties. See *Setting the Properties for the Succession Plan Template.*
    - Define the workflow approval of the succession plan. See *Defining Approval Workflow.*
    - Associate at least one succession matrix to the succession plan template for the matrix view to be available for the plan. See *Associating a Matrix to a Succession Plan Template.*

The defined approval workflow and succession plan matrices will be listed on the Default Succession Plan Template Management page.

Setting the properties for the Succession Plan Template

The properties section of the Succession Plan Template is used to indicate who can be included in a succession plan. It can also indicate if candidates included in a succession plan can also be associated with a requisition created from that plan.

Configuration > **[Performance] Administration** > **[Succession Planning] Default Succession Plan Template**

1. Click **Edit** next to Properties.
2. In the Properties page, configure the following settings:
   - Use **Available Successors** to select whether current employees, candidates from Recruiting or both can be included in a succession plan.
   - Select **Allow matching candidate to requisition** to be able to match existing external candidates to a requisition created from a succession plan.
3. Click **Save** when complete.

When a succession plan is being configured for a position, the appropriate users can be selected.

Defining an Approval Workflow

Defining an approval workflow provides the ability to determine who will approve a succession, goal or development plan and if more than one approver is set, in which order the approvals are performed and how many days they have to provide their feedback.

Approval path changes can be made at any time and are applied immediately, except for approvals that are currently started; these will be completed according to the initial path. It is important to know that approval paths apply to all users, except HR administrators. HR administrators requesting approval bypass the normal path and get a pop-up asking them to specify the approval workflow.

Configuration > **[Performance] Administration** > **[Goals Management] Goal Plan Templates**

Configuration > **[Performance] Administration** > **[Development Planning] Default Development Plan Template**

Configuration > **[Performance] Administration** > **[Performance Reviews] Review Cycles**

1. Click Edit next to Approval Workflow and in the Approval Workflow Editor page, set up the approvers by doing any of the following:
   - Click Add Roles, select the required roles and click Select to insert them in the Approval Workflow list.
   - Click Add Users, select the required users and click Select to insert them in the Approval Workflow list.
   - To change the approval order, select Move Down or Move Up for the relevant user.
   - To change the Approval (Days), which is the number of working days the approver has to respond to an approval request, enter a whole number of one or more.
   - To remove roles or users from the approval workflow, select each unwanted user or role and click Remove.
2. If you want to send an email message to notify the approvers that an approval task was assigned to them or to notify the requester of the approval that the task was approved, rejected or terminated, specify the desired email message template by selecting it from the Message Template Selector.
3. Click Save.

All the user roles and/or users selected as approvers display under the Approval Workflow section of the corresponding template page.

Associating a Matrix to a Succession Plan Template

Associating a matrix to a succession plan template allows the administrator to define what matrices will be available for display in succession plans.

Configuration > [Performance] Administration > [Succession Planning] Default Succession Plan Template

1. In the Default Succession Plan Template Management page, click Add next to Available Matrices.
2. In the Matrix Selector page, choose the matrix you want to associate to the succession plan template and click Select.
3. If needed, you can review your choices by changing the selected matrices by clicking Add again or by clicking Remove to delete a matrix from the template.
4. Click Edit next to Available Matrices to define which matrix is to be displayed by default.

The selected matrix or matrices will be available to managers when they view succession plans page.

Note that once a matrix is associated to a succession plan template, it can no longer be deleted, only duplicated and edited.

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.

Configuration

Settings	
Name	**Location**
User-defined Fields - Succession Planning	**Performance (Configuration) > [Performance] > Administration > [Succession Planning] > User-Defined Fields**

Customized Readiness for Succession Plans

Customized Readiness for Succession Plans provides the capability for customers to configure their own list of Successor Readiness values, which are truly tied to their specific business needs.

As delivered, the readiness values are:

- Ready now
- Ready in under a year
- Ready in 1-2 years
- Ready in 2+ years

Customers may change these values to represent as many different readiness scales and values that their business processes require.

> **Note:** The front-end default value is *Readiness not specified*; this value acts as a null and will always display as an option in the user interface. To avoid confusion, it is recommended that customers do not use this label as one of their customized values. Customers define their own default value, but the system-defined *Readiness not specified* will remain and cannot be deleted.

A new successor can be added from a people search in the Succession Plan, from the Nomination Slate and from a Talent Pool Search.

When *Edit Successor* is selected, or when adding a new successor to a Succession Plan, a pop-up window opens. The readiness value will be preset to the default value specified in the configuration. If no default value has been configured, the readiness value defaults to *Readiness Not Specified.*

The succession readiness values are displayed when nominating for a position from the Talent Profile, Talent Browser and Talent Pools.

Configuration

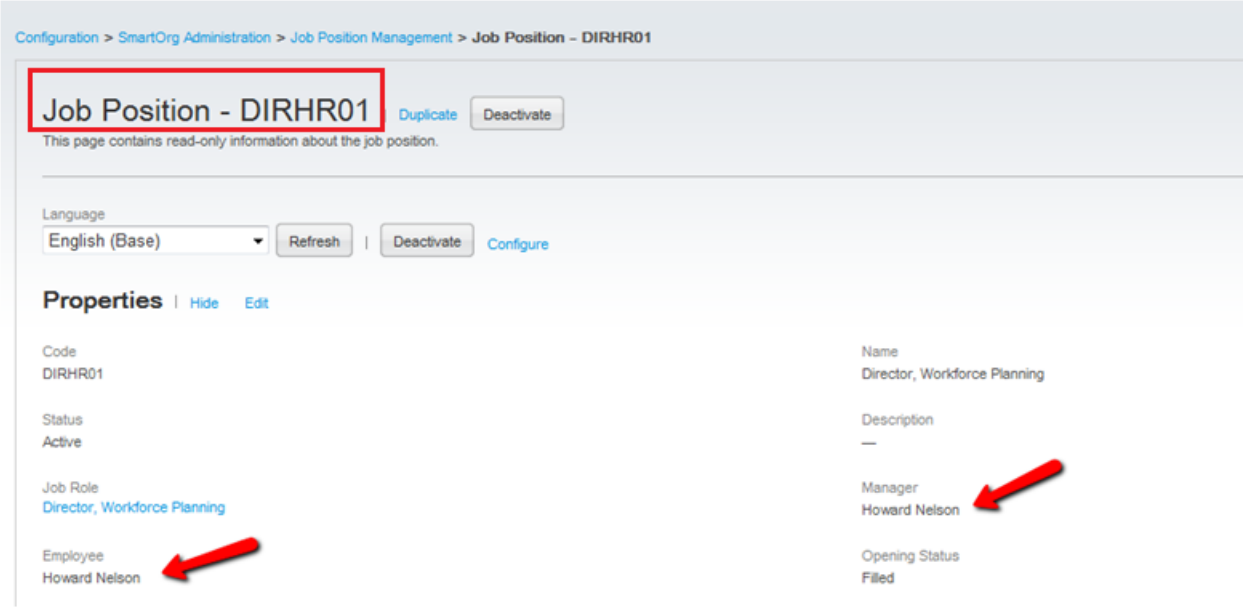
A configuration page is available in the Administration pages to allow the customization of Successor Readiness values.

Configuration Page	
Name	**Location**
Configurable Readiness	**Configuration > [Performance] > Administration > [Succession Planning] > Readiness List**

Incumbent View of Succession Plan

All employees with the proper security permissions can now access their own Succession Plans.

Access to Succession Plans is determined by Job Position Managers. For example, if the Director of Workforce Planning, Howard Nelson, is to see his own Succession Plan, he must also be denoted as the Manager for that Job Position.



If Howard Nelson is to also see the Succession Plans of his direct and indirect reports, he must have the proper User Type permissions as well.

> **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.

Configuration

User Type Permission	
Name	**Location**
Job Position Management	**Configuration > [SmartOrg] > Administration > [Job Positions] > Job Positions**
User Type and Functional Permissions	**Configuration > [SmartOrg] > Administration > [Users] > User Accounts - must select user > [User Types] > View Permissions > Performance > Succession Plans** *If the proper Functional Permissions are not selected, they can be added.*

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 *Allow nominations* 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 **Nominate for a position...** and **Nominate for this position** options to be available.

Importing Succession Plans via TCC

Succession plans can be created by using TCC and the fields available in the Succession Plan and Succession Plan Option entities.

Along with creating new succession plans and options, you can also update, merge, and delete succession plan options via a TCC import.

Example TCC file structure for creating a succession plan:

```
<?xml version="1.0" encoding="UTF-8"?>
<load:load productCode="OR1006" model="http://www.taleo.com/ws/or800/2009/01" root="SuccessionPlan"
 operation="create" locale="en" header="true" delimiter="," quote="&quot;" xmlns:load="http://www.taleo.com/
ws/integration/load">
 <load:columns>
 <load:column parameter="1" type="DATA" path="Position,Code" searchType="SEARCH" searchTarget="."
 localeType="NONE"/>
 </load:columns>
 <load:processingInstructions/>
</load:load>
```

Example TCC file structure for importing content into a succession plan:

```
<?xml version="1.0" encoding="UTF-8"?>
<load:load productCode="OR1006" model="http://www.taleo.com/ws/or800/2009/01" root="SuccessionPlanOption"
 operation="create" locale="en" header="true" delimiter="," quote="&quot;" xmlns:load="http://www.taleo.com/
ws/integration/load">
 <load:columns>
 <load:column parameter="1" type="DATA" path="SuccessionPlan,Position,Code" searchType="SEARCH"
 searchTarget=".." localeType="NONE"/>
 <load:column parameter="1" type="DATA" path="Employee,TalentUser,ArUser,EmployeeID" searchType="SEARCH"
 searchTarget="../.." ignoreEmpty="true" localeType="NONE"/>
 <load:column parameter="1" type="DATA" path="Candidate,TalentUser,Number" searchType="SEARCH"
 searchTarget=".." ignoreEmpty="true" localeType="NONE"/>
 <load:column parameter="1" path="EmergencyReplacement" searchType="NONE" localeType="NONE" type="DATA"/>
 <load:column parameter="1" path="ReadinessStart" searchType="NONE" localeType="NONE" type="DATA"/>
 <load:column parameter="1" path="ReadinessEnd" searchType="NONE" localeType="NONE" type="DATA"/>
 <load:column parameter="1" path="Sequence" searchType="NONE" localeType="NONE" type="DATA"/>
 </load:columns>
 <load:processingInstructions/>
</load:load>
```

Working with Performance Matrices

Performance 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 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

Creating a Matrix

Configuration > **[Performance] Administration** > **[View Modes] Matrices**

1. From the **Matrices** page, click **Create** next to the **Matrices** section header.
2. In the **New Matrix** page, specify a code and name for the matrix and check the desired options.

   Allow employee metric updates enables an employee's metrics to be updated directly from a succession plan matrix, replacing their existing talent profile metrics with those from the succession matrix.

   Show cell distribution includes percentage details in the bottom right of each cell, as a representation of what percentage of the total number of people are in the cell.

   a. Click **Save** when done.
3. In the specific **Matrix** page, click **Edit** next to the **X Axis** section header to specify the column information.
   a. In the **Axis Editor** page, define the column name of the matrix by selecting one of the listed dimension type.
   b. Add or remove columns as needed.
   c. Specify the labels for each column of the matrix, as well as the desired threshold for each column.

      NOTE: If you select a configurable metric dimension type, you then select a custom value to match the division instead of a threshold. The values available are dependent on how the configurable metric has been set up.
   d. Click **Save** when done.
4. To define the rows of the matrix, click **Edit** next to the **Y Axis** section header.
   a. In the **Axis Editor** page, define the row name of the matrix by selecting one of the listed dimension type.
   b. Add or remove rows as needed.
   c. Specify the labels for each row of the matrix.

      NOTE: If you select a configurable metric dimension type, you then select a custom value to match the division instead of a threshold. The values available are dependent on how the configurable metric has been set up.

   d. Click **Save** when done.
5. In the **Matrix Cells** section, click **Edit** for each cell to which you want to assign a specific label and color, if so required.
   a. Click **Save** to register your changes.
6. If you want the cell detail to show additional information about the population, you can select various employee metrics to be shown in the cell detail page. To do so, click **Add** next to the **Detail Metrics** section header.
7. In the **Metric Selector** page, select the metrics you want to show in the cell details.
   a. Click **Select.**
8. For the metrics to show in the cell or as columns in the cell detail, click **Edit** next to **Detail Metrics** and then check the **Show in Detail** and/or **Show in Cell** option, as required.
   a. Click **Save** when done.
9. Next, you can order the selected metrics so that they show in the order you specify. To do so, click **Reorder** next to the **Detail Metrics** section header.
   a. Select one metric and use the up or down arrow to move the metric to the desired order. Repeat until all metrics are showing in the desired order.
   b. Click **Save** when done.
10. At last, make sure to activate the matrix if you want it to be available for selection when adding a matrix to a template.

The matrix is now created and activated. A matrix that is activated and included in a template can not be deactivated and only the cell labels and colors can be modified.

Once created and activated, the matrix can be added to a performance review, succession plan or talent pool template.

Employee Metric Calibration

Employee metric calibration provides the ability to compare various groups of employees/candidates and to rate their employee metrics (performance, potential, risk of loss, etc) and current review metrics (current review rating, current review goal rating and current review competency rating) with respect to one another.

The calibration of employee metrics can be performed in the following contexts:

- via the matrix or chart view of a talent pool, to adjust the employee metrics of employees or candidates in that pool;
- via the chart view of a group of performance reviews, to adjust the employee metrics of the related employees;
- via the matrix view of the succession plan, to move successors around in the matrix.

The employee metrics that can be calibrated are drawn for the Employee Metrics section of the Talent Profile and the current review ratings of the Performance Review.

When a metric is adjusted via the chart or matrix, it is important to perform the update action of the metrics for the change to be committed definitively and reflected back in the Talent Profile and Performance Review.

Configuration

User type permissions required to entitle users to calibrate employee metrics via talent pools:

Permissions Configuration > [SmartOrg] Administration > [Users] User Accounts	
Permission Name	**Setting Description**
Performance > **Employee Metrics** > **View**	With employee metric viewing permissions, the user is entitled to view employee metrics and to perform calibration on metrics for his own use. That means the calibrated metrics will not be updatable.
Performance > **Employee Metrics** > **Manage**	With employee metric managing permissions, the user is entitled to view and manage employee metrics, therefore to perform calibration on metrics and to update the metrics so that the calibrated values are shown in the Talent Profile.
Common > **Pools** > **View**	To perform employee metric calibration within the talent pool context, the user need to be entitled to view talent pools.

User type permissions required to entitle users to calibrate employee metrics via performance review management center:

Permissions Configuration > [SmartOrg] Administration > [Users] User Accounts	
Permission Name	**Setting Description**
Performance > **Employee Metrics** > **View**	With employee metric viewing permissions, the user is entitled to view employee metrics and to perform calibration on metrics for his own use. That means the calibrated metrics will not be updatable.
Performance > **Employee Metrics** > **Manage**	With employee metric managing permissions, the user is entitled to view and manage employee metrics, therefore to perform calibration on metrics and to update the metrics so that the calibrated values are shown in the Talent Profile.
Performance > **Performance Reviews** > **Access via Manager Center**	This permission grants the Manager user access to performance reviews via the Navigation bar > More dropdown > Team Reviews link.
Performance > **Performance Reviews** > **View**	To perform employee metric calibration within the performance review context, the user need to be entitled to view reviews.

User type permissions required to entitle users to calibrate employee metrics via succession plans:

Permissions Configuration > [SmartOrg] Administration > [Users] User Accounts	
Permission Name	**Setting Description**
Performance > **Employee Metrics** > **View**	With employee metric viewing permissions, the user is entitled to view employee metrics and to perform calibration on metrics for his own use. That means the calibrated metrics will not be updatable.
Performance > **Employee Metrics** > **Manage**	With employee metric managing permissions, the user is entitled to view and manage employee metrics, therefore to perform calibration on metrics and to update the metrics so that the calibrated values are shown in the Talent Profile.
Performance > **Succession Plans** > **View**	To perform employee metric calibration within the succession plans context, the user need to be entitled to view succession plans.

To define the matrix or the chart view modes available in talent pools or in the performance review management view, the associated template must be configured accordingly. The matrices and charts are selected from a list of active matrices or charts, that must have been created and activated first to be available for selection.

Configuration Actions	Paths
To manage existing charts and to create new ones.	**Configuration** > **[Taleo Performance] Administration** > **[View Modes] Charts**
To manage existing matrices and to create new ones.	**Configuration** > **[Taleo Performance] Administration** > **[View Modes] Matrices**
To define the charts and matrices to be available to users when managing performance reviews.	**Configuration** > **[Taleo Performance] Administration** > **[Performance Reviews] Performance Review Template**
To define the charts and matrices to be available to users when managing talent pools	**Configuration** > **[Taleo Performance] Administration** > **[Talent Pools] Talent Pool Template**

Performance Matrix Fields

Fields related to succession matrices in Performance Administration 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
Allow employee metric updates	This enables an employee's metrics to be updated directly from a succession plan matrix, replacing their existing talent profile metrics with those from the succession matrix.	Matrix	Properties
Code	Code of the succession plan matrix	Matrix	Properties
Dimension Type	Drop-down option that indicates the information on which is based the X and Y axis. The available dimensions are: • **Performance** (default X axis type) - uses the manager's overall rating normalized value of the most recent official performance review • **Potential** (default Y axis type) - uses the rating from the candidate's talent profile and matches to the appropriate cell on the Succession Matrix • **Risk of Loss** - uses the rating from the candidate's talent profile and matches to	Matrix	Matrix Axises

Field	Description	Applicable to	Header
	the appropriate cell on the Succession Matrix • **Promotability Readiness** - compares the promotability readiness rating of the individual to the threshold values established by the administrator and places the individual in the proper cell • **Years in Management** - compares the years in management value of the individual to the threshold values established by the administrator and places the individual in the proper cell • **Years in Industry** - compares the years in industry value of the individual to the threshold values established by the administrator and places the individual in the proper cell		
Division	A division corresponds to a row or a column, depending whether you are in the X or Y axis. Divisions have default labels, which can be changed anytime. In the user interface, the division labels are shown outside of the cells, along the axis.	Matrix	Matrix Axises
Label	Label of the cell.	Matrix	Matrix Cells
Location	Visual indication of where the cell is located exactly in the matrix, with the corresponding dimension values.	Matrix	Matrix Cells
Name	Name of the succession plan matrix.	Matrix	Properties
Name	Name of the metric. The available metrics are: • Average Goal % Completed - uses the average completed percentage of all the employee's goals • Bench Strength - is a enumeration value based on the number of successors in a succession plan. Possible values are: None (no succession plan exist), Low (no successor has been defined on the existing succession plan for the position), Medium (there is 1	Matrix	Metrics

Field	Description	Applicable to	Header
	successor) and Good (there are 2 or more successors). • Job role in career plan - indicates if the job role associated with the succession plan or talent pool using the matrix is included in the person's career plan • Gap Analysis Rating - gap between the requirements of the job position the successor is in versus that employee's current set of competencies • Performance Rating - the manager's overall rating normalized value of the most recent official performance review • Risk of Loss - the rating from the candidate's talent profile • Succession Plan Count - the number of succession plans the employee is on		
Show in Cell	Radio button option that indicates which of the metrics is to be shown in the cell on the online matrix. The selected metric to be shown in the cell will be indicated in the user interface by a message next to the name of the matrix, as "Displaying ...". Note that only one metric can be seen in the cell itself. The other metrics can be viewed via the detail view.	Matrix	Metrics
Show in Detail	Checkbox option that indicates whether the metric is to be displayed in the Employee Details window.	Matrix	Metrics
Show in Print	Checkbox option that indicates whether the metric is to be displayed in the printed version of the succession matrix.	Matrix	Metrics
Threshold	Values applicable to each cell, which will determines where a successor falls in the matrix.	Matrix	Matrix Axises
Visible	Option that indicates whether the cell label will be displayed or not. For some reason, it might sometimes be necessary to hide some cell labels.	Matrix	Matrix Cells

11 Development Planning Administration

Configuring 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.

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.

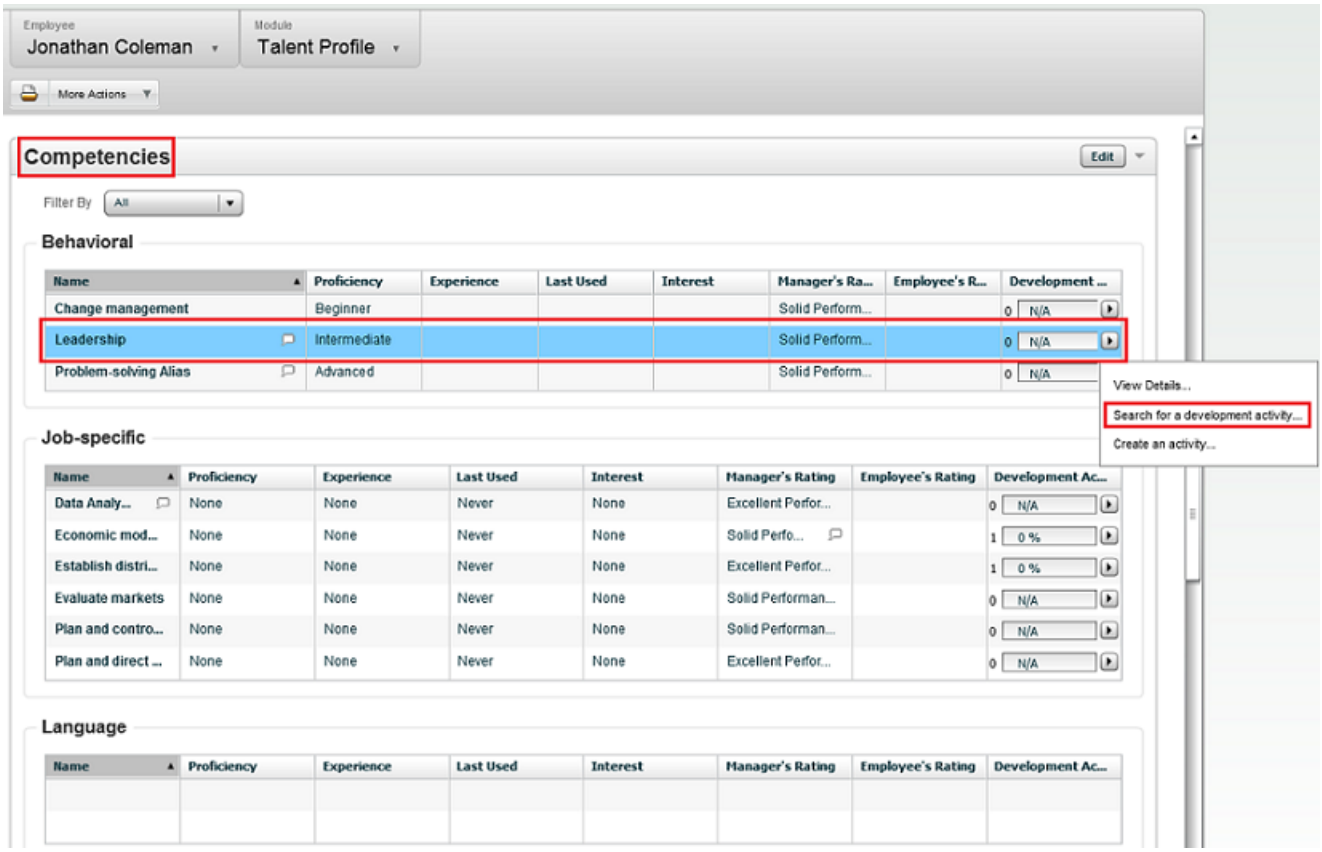
Various types of searches are offered to employees to find activities:

- 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.

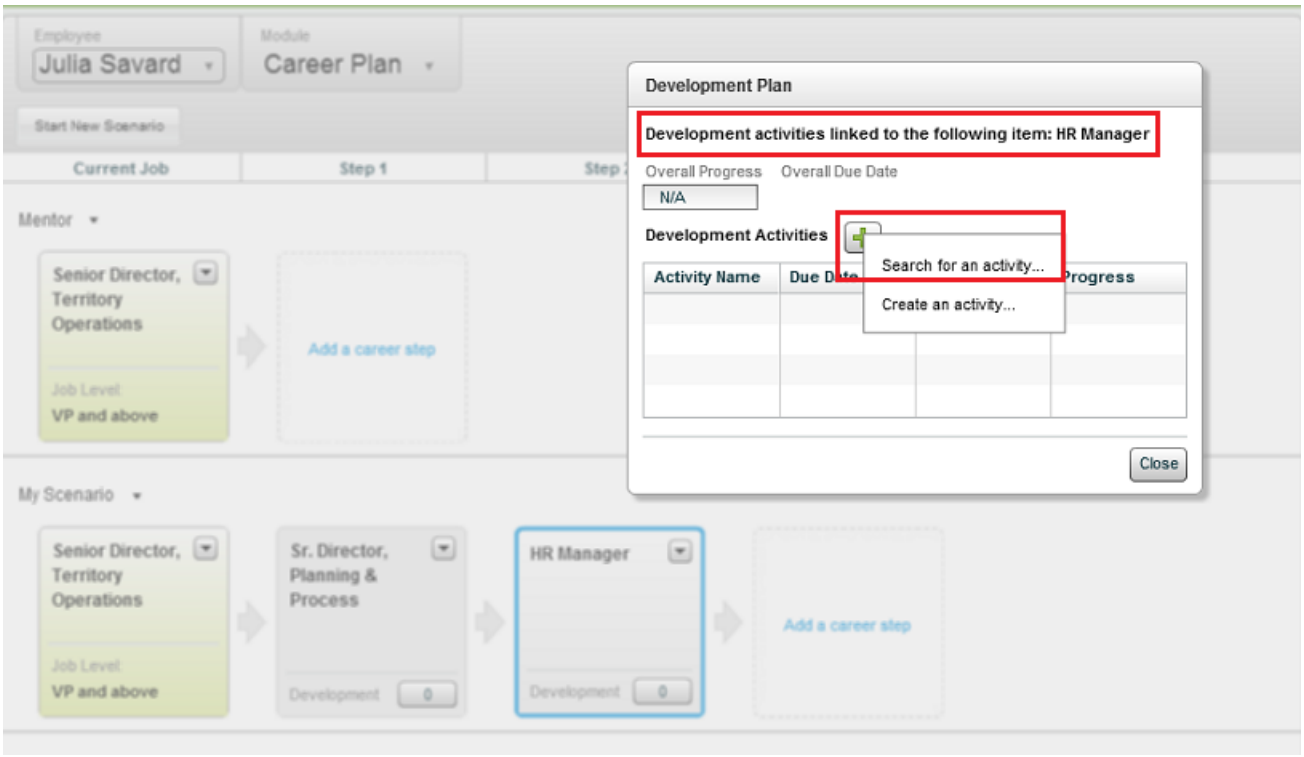
When searching for Development Activities from the Talent Profile, the context of the competency is kept and only the Development Activities associated to that original competency are returned in the search results. This allows for more focused career development discussions and provides more context for the employee.

Note: This contextual search functionality does not apply to Development Activities coming from Oracle Taleo Learn.



Each of the Development Activities returned in the search results shown below are associated to the Leadership competency.

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.

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
Performance > Performance Reviews > View — If this user is a mentor.	The user has read-only access to performance reviews of employees for whom he is a mentor.
Performance > Performance Reviews > Manage — If this user is a mentor.	The user has write access to performance reviews of employees for whom he is a mentor.
Performance > Goal Plans > View — If this user is a mentor.	The user has read-only access to goal plans of employees for whom he is a mentor.
Performance > Goal Plans > Manage — If this user is a mentor.	The user has write access to goal plans of employees for whom he is a matrix manager.
Performance > Development Plans > View — If this user is a mentor.	The user has read-only access to development plans of employees for whom he is a mentor.
Performance > Development Plans > Manage — If this user is a mentor.	The user has write access to development plans of employees for whom he is a mentor.

User Type Permission	Description
Performance > Employee Metrics > View — If this user is a mentor.	The user has read-only access to employee metrics of employees he is mentoring.
Performance > Employee Metrics > Manage — If this user is a mentor.	The user has write access to employee metrics of employees he is mentoring.
Performance > Employee Profile > View — If this user is a mentor.	The user has read-only access to the talent profiles of employees he is mentoring.
Performance > Employee Profile > View — If this user is a mentor.	The user has write access to the talent profiles of employees he is mentoring.

Enabling Development Planning

1. Enable Development planning.
   a. From **Configuration > [Performance] Settings** , select Enable Development Planning and click Edit.
   b. From the Editor window, select Yes and click Save.
2. Enable user permissions for required employees.
   a. From **Configuration** > **[SmartOrg] Administration** > **[Users] User Types** , select the user type associated with the employees.
   b. From Functional Domains, click Edit next to Performance > Development Plans.
   c. Enable the desired View and/or Manage permissions and click Save.

Development planning functionality is now available, to employees with access enabled, via **Performance Navigation bar > Development**.

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.

Printed development plan		Development Plan page Section - Field
	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** - Theses 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
Current/Archived Development Activities	**Field**	**Development Activity page Section - Field**
Sub-section on gray background section When the Current/Archived Activities section prints, this sub-section always displays. If some fields have no values, they will indicate *Not Specified*.	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
Development Activity Information	Name	Development Activity Information

Printed Development Plan		Source Field
Current/Archived Development Activities	**Field**	**Development Activity page Section - Field**
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. When the Current/Archived Activities section prints, this sub-section always shows. If some fields have no values, they will indicate *Not Specified* .	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
Measurement 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.	Actual Value	Measurement - Actual
	Target Value	Measurement - Target
	Stretch Value	Measurement - Stretch
	Progress	Measurement - Progress
Comments 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.	Author	Comments - Added by
	Date	Comments - Added on
	Message	Comments - text
Linked Items 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.	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.

Defining the Development Plan

Development Plan Template

The development plan template provides the ability to define the default content and behavior of the development plan to be used by employees.

The development plan template allows customers to decide what information about the activities in the development plan are displayed, can be edited and/or propagated and need approval if changed, who are the users entitled to approve development plans, if instructions are available, and if activities can be assigned to employees by their manager.

The information that is to be available for each activity in the development plan is configured using a series of standard fields that can be displayed in addition to any other user-defined fields the organization may decide to add.

The template also provides the ability to define the approval workflow of development plans, that is the roles and/or specific users that must approve the development plan of employees, as well as the permission for managers to assign activities to their direct reports.

It is important to know that the defined template applies to all users, as there is only one development plan template.

Edits to the development plan template can be made at any time and apply immediately. Therefore, changes made to the template, whether it be to display a new field or to hide one, will affect all employees' development plans. However, hiding information that was previously displayed does not delete the information; it remains in the database and can later be displayed if the corresponding field is exposed again.

Defining the Default Development Plan Template

The definition of the default development plan template allows the organization to determine the information that can be provided about each activity in the plan as well as the approval workflow of the development plan.

Configuration > **[Taleo Performance] Administration** > **[Development Planning] Default Development Plan Template**

1. In the **Default Development Plan Template** page, click **Configure** to change the active languages.
2. In the **Properties** section, indicate whether managers should be entitled to assign development activities to their direct reports, and if so, specify in which circumstances these activities can be added.
3. In the **Instructions** section, enter instructions for each active language.

   If an active language does not have instructions it will display the base language instructions to the user in Performance. You can leave this section empty if you do not want to display instructions.
4. In the **Approval Workflow** section, define the approval workflow of the development plan by selecting the desired roles and/or specific users required to approve development plans.
   a. If you want email notifications to be sent upon specific actions, select the appropriate message template.
5. In the **Standard Fields** section, indicate the fields that are to be displayed on the development plan page, which are editable and which field information is to be propagated to the employee's development plan when a manager assigns one of his activity to a direct report. Also, when approval is required, select the fields that require the plan to be re-approved if their value is changed.

6. If you wish to display additional information about activities in the development plan, you can add user-defined fields, which will need to have been created beforehand to be available for selection.

Any changes made to the development plan template affect all users and apply automatically.

Development Plan Template Field Descriptions

The following table presents a list of the fields related to the development plan template.

UI Element	Description	Header
Allow managers to assign development activities	Setting that entitles managers to assign development activities to their direct reports.	**Properties**
Add activities even if the employee's development plan does not exist	Setting that entitles managers to assign development activities to their direct reports and add those activities even if a development plan has not yet been created for the employees.	**Properties**
Add activities even if the employee's development plan is approved	Setting that entitles managers to assign development activities to their direct reports and add those activities even if the development plan has already been approved. The development plan will go back to an unapproved status.	**Properties**
Language	Each active language is available from the list.	**Instructions**
Instructions	These instructions are available at the top of the development plan. The base language instructions are used if the instructions for an active language variant have not been written.	**Instructions**
Available Approval Roles	List of all available roles in the company that can be selected as approvers.	**Approval Workflow**
Approval Workflow	List of the selected approvers, which can be approval roles or specific users. In Edit mode, the approvers can be reordered as desired using the up and down arrows.	**Approval Workflow**
Assignment Correspondence	Field that indicates the message template to use when an approval task is assigned.	**Approval Workflow**
Completion Correspondence - Approval	Field that indicates the message template to use when an approval process is completed by an approval.	**Approval Workflow**
Completion Correspondence - Rejection	Field that indicates the message template to use when an approval process is completed by a rejection.	**Approval Workflow**
Completion Correspondence - Termination	Field that indicates the message template to use when an approval process is terminated.	**Approval Workflow**
Name	Column that lists the name of the standard fields that can be part of the development plan template.	**Standard Fields**

UI Element	Description	Header
Displayed	Option that indicates that the standard field is to be displayed on the development plan.	**Standard Fields**
Editable	Option that indicates whether the standard field is editable or read-only.	**Standard Fields**
Propagated	Option that indicates whether the value of the standard field is propagated when an activity is assigned to an employee by the manager.	**Standard Fields**
Required Approval	Option that indicates whether a change to the value of the standard field needs to be approved. Making a change to a field requiring approval puts the development plan back into an unapproved status.	**Standard Fields**
Name	Column that lists the name of the user-defined fields that are part of the development plan template.	**User-defined Fields**
Type	Type of field, which default from the type assigned when the user-defined field was created.	**User-defined Fields**
Editable	Option that indicates whether the user-defined field is editable or read-only.	**User-defined Fields**
Propagated	Option that indicates whether the value of the user-defined field is propagated when an activity is assigned to an employee by the manager.	**User-defined Fields**
Requires Approval	Option that indicates whether a change to the value of the user-defined field needs to be approved. Making a change to a field requiring approval puts the development plan back into an unapproved status.	**User-defined Fields**
UI Component	Value that indicates the type of input, which can be: Text Input, Check Box, Date Input or Numerical Input.	**User-defined Fields**

Creating a User-Defined Field

Creating a user-defined field allows an organization to create and define company specific information that can later be added to various contexts, according to the context for which it was created.

Configuration > [Performance] Administration > [Performance Reviews] User-defined Fields

Configuration > [Performance] Administration > [Goals Management] Employee Goal User-defined Fields

Configuration > [Performance] Administration > [Goals Management] Competency Goal User-defined Fields

Configuration > [Performance] Administration > [Employee Management] Employee Information User-Defined Fields

Configuration > **[Performance] Administration** > **[Employee Management] Employee Metrics User-Defined Fields**

1. In the User-Defined Field page of the selected context, click Create next to the User-Defined Fields header.
2. In the New User-Defined Field page, specify the properties of the new field.

   Note that once created and saved, only the name can be edited.

   Also, if more than one language has been configured, a name will be required for each language before saving is allowed.
3. Click Save.

The new field displays in the list of User-Defined Fields and is available for selection.

Once created, the user-defined field can be added to a review's custom section, to a goal plan or development plan template or to the Talent Profile form, depending on the type of field created.

Creating a User-Defined Selection List

Creating a user-defined selection list allows system administrators to create additional selection lists having a set of user-defined values (or elements.) The selection list may be later used to define a user-defined field. This functionality can be used in performance reviews, goals plans, development plans or in the employee management section of the Talent Profile.

Configuration > **[Performance] Administration** > **[Global Configurations] User-defined Selections**

Configuration > **[Performance] Selection Lists**

1. In the User-Defined Selections page, click Create next to Selections.
2. In the New User-Defined Selection page, specify the properties for the new selection.
3. Click Save.
4. In User-Defined Selection page, click Create next to Elements to define the elements of the list.
5. In the New Element page, specify the properties of the new element.
6. Repeat steps 4 and 5 for each element composing the selection list.

The new selection list name displays and is available for use in the list of domain fields when creating user-defined fields.

Once the properties are created, you must activate at least one value (element) to then activate the selection for the newly created selection list to be available as a user-defined field to be added in custom sections of performance reviews, goal plans, development plans and the employee management section of the Talent Profile.

User Defined Element Fields

The following table presents all the user-interface elements found in Performance Administration in relation with user-defined selections and fields.

UI Element	Description	Applicable to
Code	Unique code assigned to the user-defined selection.	**Properties**
Code	Unique code assigned to the element composing the user-defined selection.	**Elements**
Code	Unique code assigned to the user-defined field.	**User-defined Fields**
Domain	Type of value the user-defined field will contain. In addition to the default domains, the other domains correspond to the name of active user-defined selections. The default domains are: • Date • Text • Numerical • Multilingual Text • Date and Time Zone When the domain selected corresponds to a user-defined selection, the type of selection must also be specified.	**User-defined Fields**
Name	Name of the user-defined selection.	**Properties**
Name	Name of the element composing the user-defined selection. If more than one language has been configured, a name will be required for each configured language.	**Elements**
Name	Name of the user-defined field. If more that one language has been configured, a name will be required for each configured language.	**User-defined Fields**
Order	Sort order of the elements when a list of possible values is offered. Possible values are: • Alphabetical Order • Sequential Order	**Properties**
Selection	Type of selection list to be displayed when a user-defined selection is used as a domain. The possible values are: • Single - the elements of the list are presented with radio buttons • Multiple - the elements of the list are presented with check boxes	**User-defined Fields**

Building the Development Library

Development Library

The development library is the container of all predefined development activities that employees can add to their development plan.

The development library, which is delivered empty, is maintained by the customer and is flexible enough to accept content from multiple types of third party systems. The most common integration with Taleo's development library will be with the customer's Learning Management System (LMS). Integration is done using Taleo Connect Client (TCC). The library can store fields describing course information (such as name, description, prerequisites and cost), which can then be searched by employees during the process of building out the development plan. Please refer to the Data Dictionary for fields that are exposed for import and export.

The development library can be built with many different types of development activities. In addition to storing formal activities such as courses and books, the library can contain informal, on-the-job activities such as: rotational assignments, project participation, job shadowing assignments, etc.

When information on an activity in the development library needs to be created or edited, this can be done in the Configuration module.

For employees to find a predefined activity in the development library they must perform a search from their development plan. Various search options are offered, such as: keyword or advanced search, best fit, top rated and shared 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.

Development Activity Category

A development activity category provides the ability to group activities in defined groups to facilitate their organization within the development library and provide some guidance to employees searching for activities.

The activity categories are set by the customer according to its specific needs and are used in two different situations:

- When an employee creates a custom development activity, the 'Custom' type categories can be used to categorize the various activities.
- When the administrator is creating public activities to be added to the development library, the 'Other' type categories can be used to group activities that are not courses or documents, therefore assisting employees when searching for activities in the development library using the advanced search.

Creating a Development Activity Category

Configuration > **[Taleo Performance] Administration** > **[Development Planning] Development Activity Categories**

1. Click **Create** next display the New Development Activity Category page.
2. Enter the code, name and type.

   Type is used to control which development activities can be associated with the category. Activities can only be grouped under categories of the same type.
3. Click **Save**.

The category is added to the Development Activity Categories list in Draft status.

The category needs to be activated so that development activities can be associated with it.

Creating a Development Activity

Configuration > **[Taleo Performance] Administration** > **[Development Planning] Development Activities**

1. Click Create to display the New Development Activity page.
2. Enter the required information for the activity.
   - To help organize activities, they should be associated with a Category.

     An activity cannot be associated with a provider

     The properties available are dependent on the activity type.

3. Click **Save**.

The activity is added to the list of activities in the **Development Activity Management** page.

For the activity to be added to the development library and available for selection to employees searching activities, the new activity needs to be activated.

Activating a Development Activity

The activation of a development activity is required for the activity to be added to the development library and later be selected by employees to add to their development plan.

Configuration > **[Taleo Performance] Administration** > **[Development Planning] Development Activities**

1. In the **Development Activity Management** page, click **Activate** next to the activity to be activated.

The activity will show an Active status.

Duplicating Development Activities and Categories

The development object must be in draft or inactive status.

Configuration > **[Taleo Performance] Administration** > **[Talent Profile Management] Talent Profile Layout**

Configuration > **[Taleo Performance] Administration** > **[Development Planning] Development Activities**

1. Click Duplicate and the properties page for the object is displayed, with a number prefixed to the object name.
2. Click Edit to change the object name and other properties and then click Save.
3. Click Add to edit other required settings.

If the object used for duplication was associated with a provider, the new duplicated object is not and cannot be associated with the provider.

Activate the object, enabling it to be used with a development plan.

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

Setting the Status of Development Providers

If you are deactivating a provider you should ensure that provider's development activities and categories are not in use.

Configuration > [Taleo Performance] Administration > [Development Planning] > Development Activity Providers

1. Click Activate or Deactivate as required and if needed click Yes in the confirmation window.

Activities for activated providers are displayed in the **Development Activities** page and those activities which are in an active state are displayed in Performance. Activities for deactivated providers are removed.

Development Activity Fields

The following table presents a list of the fields related to development activities in Performance Administration.

UI Element	Description	Header
Author	Name of the user who created the activity, selected from a list of valid users.	**Development Activities**
Code	Code of the activity.	**Development Activities**
Code	Code of the development activity category.	**Development Activity Categories**
Cost	For course type activities only. Cost associated with the course, expressed in dollars and cents, but without the dollar sign.	**Development Activities**
Description	Free-form text field holding the description of the activity.	**Development Activities**
Description	Description of the activity category, in the specified language. If more than one language has been configured, a name will need to be specified for each language before saving is allowed.	**Development Activity Categories**
Development Activity Category	Lookup field that is used to associate a category to the activity. When a category is selected,	**Development Activities**

UI Element	Description	Header
	the activity type related to the category is automatically assigned to the **Type** field.	
Document Author	For document type activities only. Name of the author of the document.	**Development Activities**
Duration	For course type activities only. Duration of the course expressed in number of hours.	**Development Activities**
End Date	For course type activities only. Date on which the course ends.	**Development Activities**
Equivalent Titles	For course type activities only. Free-form text field indicating any equivalent courses.	**Development Activities**
External ID	For course type activities only. ID that is assigned by an LMS or other 3rd party system when the courses are integrated via integration from another system.	**Development Activities**
ID	ID of the activity, that can serve as an extra identifier to the code.	**Development Activities**
Institution	For course type activities only. Name of the institution giving the course.	**Development Activities**
ISBN	For document type activities only. ISBN code of the document.	**Development Activities**
Language	Language of the activity.	**Development Activities**
Location	For course type activities only. Location where the course is given.	**Development Activities**
Name	Name of the activity.	**Development Activities**
Name	Name of the activity category, in the specified language. If more than one language has been configured, a name will need to be specified for each language before saving is allowed.	**Development Activity Categories**
Objective	For course type activities only. Free-form text field indicating the purpose of the course.	**Development Activities**
Prerequisites	For course type activities only. Free-form text field indicating any prerequisites to the course.	**Development Activities**
Provider	Refers to the third party provider of the development activity library. This value cannot be edited.	**Development Activities**
Publisher	For document type activities only. Name of the publisher of the document.	**Development Activities**
Scoring Type	For course type activities only. Method used to measure the success level of the course. Possible values are: • **Graded** **Pass/Fail** **Not scored**	**Development Activities**

UI Element	Description	Header
Start Date	For course type activities only. Date on which the course starts.	**Development Activities**
Status	Status of the activity indicating whether the activity is active, inactive or just in a draft mode.	**Development Activities**
Type	Type of activity. Possible values are: • **Document** - Used for any category to be associated with document type activities. **Course** - User for any category to be associated with course type activities. **Other** - User for any category to be associated with activities other than courses or documents.	**Development Activities**
Type	Type of activity associated with the category. Possible values are: • **Custom** - Used for any category that are to be associated with custom and private activities employees might create for themselves. This category is only available to employees creating custom activities, not to administrators creating activities to be added to the development library. **Document** - Used for any category to be associated with document type activities. **Course** - User for any category to be associated with course type activities. **Other** - User for any category to be associated with activities other than courses or documents.	**Development Activity Categories**
URL	Web address of the activity, where more information can be found.	**Development Activities**

Working with Learning Management Systems

Integration with Learning Management Systems

Via Taleo Connect Client, customers are able to import data into an employees 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**.

Enabling a Learning Management System Provider

Configuration and activation of the integration is the responsibility of Taleo Support.

A Learn.com Activation Guide is available, containing specific implementation details.

Configuration > **[SmartOrg] Administration** > **[Production Security] Authentication Configuration**

1. From the Authentication Configuration page, click Show next to SAMLSPURL Configuration.
2. Click Add next to SAML Service Provider URLs.
3. In the SAML SP URL window, specify the URL and select the SAML SP consumer from the list of available consumers.

Access to Taleo Learn

Learning functional domain user type permissions are part of configuring access to Taleo Learn.

Configuration

In addition to the Learn permissions listed below, you must have the Learn module and the Development Plan module enabled, along with Development Plan user permissions.

User Type Permissions		
Name	**Description**	**Location**
Access Learn as a default user	This provides standard user access to Learn. This enables users to see LearnCenter pages and learning content. All sub permissions (in Learn) except View Course Offline are automatically selected. The user can also use the Com Center.	Learning > Learn
Access Learn as a supervisor	This provides Learn supervisor access which typically provides manage access in Learn to users, user communications, completion certificates, assignments, enrollments, development plans, goals, and reports.	Learning > Learn
Access Learn as an administrator	This provides Learn administrator access, typically enabling users to manage LearnCenter configuration options and set up courses.	Learning > Learn
Access Learn as user 1, user 2, user 3	These are custom user types, which must be aligned with custom user accounts in Taleo Learn by Taleo Customer Support.	Learning > Learn

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

Development Plans and Taleo Learn Activities

Taleo Learn items can be added to and viewed from Development Plans, as development activities.

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 **Search for an activity...** and **Assign Activities** 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 *No* you cannot search for a development activity and the remaining three settings do not affect the system. The default value is *Yes*.	Public
Search Content Provider	Indicates whether the Performance development activity library or Taleo Learn is used to provide activities for development plans. If *Taleo Learn* is selected, additional configuration is required. The default value is *Development Activity Library* 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

12 Talent Pool Administration

Getting started with Talent Pools

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

A talent pool is a list of people nominated by pool collaborators. These pool members can be tracked and analyzed in relation to a succession plan, development plan or for resource forecasting.

You can create talent pools at anytime for any purpose, providing the flexibility to track unlimited groups of employees, such as high-potential employees, future leaders, and successors.

You can analyze the members of your talent pool with a matrix, as the performance matrix can be used outside of a succession plan. From there you can assign development activities and move employees between matrix cells with simple drag and drop actions. Bar charts can also be used for evaluating pool members. They can include a wide range of business critical data, such as potential, promotability readiness and risk of loss, while you can drill down into chart segments to display detailed information on the pool members included there. Filters can also be applied to pools to help narrow the focus of large pools. The filters available are contextual and the values that can be filtered are dependent on where you are in the system.

The key components of talent pools are:

- pool users, who can be owners or collaborators. Owners act as administrator and facilitator. By default, the person creating the pool is made the owner and can add collaborators and edit the name, description, owner and context. Collaborators are fundamental to a successful talent pool. They decide on who the pool members should be and populate the pool. Collaborators can also rank pool members and assign development activities.
- member search, that makes it easier to find relevant pool members with advanced search criteria settings that can be configured for talent pools. See the list of available settings below.
- development activities, which can be assigned to one or more pool members directly from the members list.

Administering Talent Pools

The required setup must be completed in the Configuration module before Talent Pools can be used.

- Talent Pools must be enabled: *Enabling Talent Pools*
- Permissions for pool users need to be applied: *Configuring Talent Pool User Permissions*
- Search criteria for the pools need to be set: *Configuring Talent Pool Search Criteria*
- Matrices you want available for pools need to be selected: *Associating Matrices with Talent Pools*
- If your implementation uses charts, they can be made available to talent pools: *Associating Charts with Talent Pools*

Enabling Talent Pools

You must enable the feature in the Configuration module for it to be displayed in Performance.

There is only a single setting required to enable Talent Pools. Functionality that extends pool usability is configured separately.

To Enable Talent Pools:

This step requires Taleo Support access.

Configuration > [Performance] Settings

1. Select Category from the Refine by list, select Talent Pools and click Refresh.
2. Select Enable Talent Pool and click Edit.
3. Select Yes and click Save.

Talent Pools are accessible in the application for users with correct permissions.

Ensure required users have talent pool user type permissions enabled.

Configuring Talent Pool User Permissions

User permissions designate who can be owners and collaborators of Talent Pools.

The Pools functional domain controls user access to talent pools. For someone to be able to collaborate on a pool they must have view and manage permissions. If someone was added to a talent pool as a collaborator, but did not have the manage permission, they would be unable to complete any actions within the pool.

It is also important to ensure pool users have the required overall permissions to view details of potential candidates and employees who will make up the pool members. If you want to take advantage of the ability to calibrate employee metrics from a talent pool, see *Employee Metric Calibration*.

Configuring Talent Pool user permissions

Configuration > **[SmartOrg] Administration** > **User Types** > **[Functional Domains] Common > Pools**

1. Select **View > If this user is the pool owner or a pool user** to enable users to see talent pools and view their content.
2. Select **Manage > Allow creating and deleting pools** to enable users to be owners.
3. Select **Manage > If this user is the pool owner or a pool user** to enable users to collaborate on pools.

   This includes the ability to add and remove pool users, to use a matrix associated with the pool and additionally for owners, the ability to add pool collaborators and change the pool context.

Users associated to that user type can view and manage Talent Pools.

Configure talent pool advanced search criteria.

Configuring Talent Pool Search Criteria

The correct search criteria helps ensure the right members are found for the purpose of the talent pool.

Talent pool search uses the same Person Search settings for indicating which search fields are available as succession planning and talent search.

> **Note:** Users must have **[Users] User Types > Performance > Team Management > Access centralized search** for advanced search to be available.

To Configure Search Criteria:

Configuration > [Taleo Performance] Settings

1. Select Category from the Refine by list, select Talent Pool Search and click Refresh.
2. Select Enable Advanced Search and click Edit.
3. Select Yes, click Save and return to the Settings list.
4. Select Category from the Refine by list, Select Person Search and click Refresh.
5. Select the name of a field you want included as search criteria, to go to its properties page and set its value to Yes.

   Repeat the step for each required setting. For details on the fields, see *Talent Pool Configuration Settings*.

Advanced search is enabled in talent pools and the selected settings are available as search criteria.

Associating Matrices with Talent Pools

Matrices are associated with Talent Pools via the Talent Pool Template.

At least one matrix must be available for the feature to be available to users in Taleo Performance. This option enables specific matrices to be used with talent pools, including which matrix is the default and the order in which they should be displayed to the user in the Matrices list. Only active matrices can be associated with talent pools.

To Associate Matrices with Talent Pools:

There must be active matrices available.

Configuration > **[Performance] Administration** > **[Talent Pools] Talent Pool Template**

1. Beside Matrices, click Add to select the matrices you want to associate with talent pools and click Select when complete.

   For information on configuring matrices, see *Creating a Matrix*.
2. Click Edit to select which matrix is used by default when the Matrix view is first accessed by a talent pool user and click Save when complete.
3. Click Reorder to set the order in which the matrices are displayed in the list in the Matrix view and click Save when complete.

The chosen matrices are listed in the order in which they are displayed in Performance and the default matrix is identified.

Associating Charts with Talent Pools

Charts present employee analytics in bar chart format.

By default no charts are associated with talent pools and they must be explicitly added. Once they have been added, they can be reordered. Like matrices, only active charts can be added. Charts can be configured using 13 different metrics and to allow drill down capabilities for viewing members in specific segments.

To Associate Charts with Talent Pools:

There must be active charts available.

Configuration > [Performance] Administration > [Talent Pools] Talent Pool Template

1. Beside Charts, click Add to select the charts you want to associate with talent pools and click Select when complete.

   For information on configuring charts, see *Creating a Chart*.
2. Click Edit to select which chart is used by default when the Chart view is first accessed by a talent pool user and click Save when complete.
3. Click Reorder to set the order in which the charts are displayed in the list in the Chart view and click Save when complete.

The chosen charts are listed in the order in which they are displayed in Taleo Performance and the default chart is identified.

Talent Pool Reference

Please view the following sections if you require reference information or want to disable talent pools.

- *Deactivate pools*
- *User permissions transfer considerations*
- *Settings reference*

Disabling Talent Pools

You must have Taleo Support level access.

Configuration > [Performance] Settings.

1. Select the Enable Talent Pool option and click Edit.
2. Select No and click Save.

Talent Pools are no longer accessible in the application. While the option for selecting Talent Pools are removed from the application, their values remain in the system database. Re-enabling Talent Pools displays previously created pools in your system.

Removing Talent Pool Template Objects

There must be matrices or charts in use.

Configuration > **[Performance] Administration** > **[Talent Pools] Talent Pool Template**

1. From the Actions column, click Remove for the appropriate matrix or chart.

   There must be at least one matrix remaining in the list at all times and when a default object is removed, the corresponding object at the top of the list is designated as the default.
2. Click Yes in the confirmation dialog box and the object is removed.

Talent Pool Permission Considerations

Due to the specific talent pool user permission framework, transferring talent pool users in the User Accounts section behaves differently than a typical transfer.

A user cannot be transferred in the following situation: Transferring from a user that has **Pool > Manage** permission to a user who has **Pool > Manage > Allow creating and deleting pools**. This is because the latter is considered to not have the required user permissions.

A user can be transferred in the following instance: Transferring from a user that has **Pool > Manage > Allow creating and deleting pools** to a user who has **Pool > Manage**. This is because the latter is considered to not have the required user permissions.

The reason for these restrictions, based on user type permissions, is illustrated in the following example, where the same application of setting values for pools and another domain has different results.

User A has **Performance > Performance Reviews > Manage** and **Common > Pools > Manage** user type permissions. User B has **Performance > Performance Reviews > Manage > If this user is one of the authors** and **Common > Pools > Manage > Allow creating and deleting pools** user type permissions.

It is implied that User A has full access to performance reviews with the Manage option selected; however, the same cannot be implied for talent pools and the user can only manage (change name, add users, etc...) pools, without the ability to create or delete them. User B can only manage performance reviews they have created, while also being able to manage pools including creating and deleting them.

Talent Pool Configuration Settings

Initial activation of Talent Pools is the responsibility of Taleo Customer Support, via the Enable Talent Pool setting.

Configuration > [SmartOrg] Administration > [Users] User Types		
Functional Domain	**Permission**	**Default Value**
Common > Pools	View • If this user is the pool owner or a pool user	• Disabled

Configuration > [SmartOrg] Administration > [Users] User Types		
Functional Domain	**Permission**	**Default Value**
	Manage • If this user is the pool owner or a pool user Allow creating and deleting pools	
Performance > Team Management > Access Centralized Search	This enables access to central search, where employees can be added to pools.	• Enabled (for Managers and HR Admin)

Configuration > [Performance] Settings			
Setting Name	**Setting Description**	**Possible Values**	**Setting Category**
Enable Talent Pool	Enables the Talent Pool functionality in the application.	• Yes • No (default)	**Talent Pools**
Enable Advanced Search	Indicates if the advanced search feature is available.	• Yes • No (default)	**Talent Pools Search**

Configuration > [Performance] Settings			
Setting Name	**Setting Description**	**Possible Values**	**Setting Category**
City Advanced Search Field Configuration	Indicates if the city field criterion is available in the advanced search.	• Yes • No (default)	**Person Search**
Competencies Advanced Search Field Configuration	Indicates if the "Competencies" section is available in the advanced search.	• Yes • No (default)	
Country Advanced Search Field Configuration	Indicates whether the country field criterion is available in the advanced search.	• Yes • No (default)	**Person Search**
Employee Job Field Advanced Search Field Configuration	Indicates if the "Employee Job Field" criterion is available in the advanced search.	• Yes • No (default)	**Person Search**
Employee Job Role Advanced Search Field Configuration	Indicates if the "Employee Job Role" criterion is available in the advanced search.	• Yes (default) • No	**Person Search**
Employee Location Advanced Search Field Configuration	Indicates whether the employee location field criterion is available in the advanced search.	• Yes • No (default)	**Person Search**

Configuration > [Performance] Settings			
Setting Name	**Setting Description**	**Possible Values**	**Setting Category**
Employee Metrics User-defined Fields in Advanced Search Field Configuration	Indicates if the section "Employee Metrics User-defined Fields" is available in the advanced search.	• Yes • No (default)	**Person Search**
Employee Manager Name Advanced Search Field Configuration	Indicates whether the employee manager name field criterion is available in the advanced search.	• Yes • No (default)	**Person Search**
Employee Organization Advanced Search Field Configuration	Indicates whether the employee organization field criterion is available in the advanced search.	• Yes • No (default)	**Person Search**
Employee Potential Advanced Search Field Configuration	Indicates if the "Potential" field is available in the advanced search. This field is restricted.	• Yes • No (default)	**Person Search**
Employee Readiness For Promotion Advanced Search Field Configuration	Indicates if the "Readiness" field is available in the advanced search. This field is restricted.	• Yes • No (default)	**Person Search**
Employee Review Rating Advanced Search Field Configuration	Indicates if the "Employee Review Rating" criterion is available in the advanced search.	• Yes • No (default)	**Person Search**
Employee Risk Of Loss Advanced Search Field Configuration	Indicates if the "Risk of Loss" field is available in the advanced search. This field is restricted.	• Yes • No (default)	**Person Search**
Employee User-defined Fields in Advanced Search Field Configuration	Indicates if the section "Employee User-defined Fields" is available in the advanced search.	• Yes • No (default)	**Person Search**
Interest In International Advanced Search Field Configuration	Indicates if the "Interest in International Assignment" field is available in the advanced search.	• Yes • No (default)	**Person Search**
Job Title Advanced Search Field Configuration	Indicates whether the job title field is available in the advanced Search.	• Yes • No (default)	**Person Search**
Management Experience Advanced Search Field Configuration	Indicates if the "Management Experience" field is available in the advanced search.	• Yes • No (default)	**Person Search**
Show the 'Fit' Column in Person Search Result	Indicates whether to show the 'Fit' column on the results page of a person search.	• Yes • No (default)	**Person Search**
Reassignment Candidate Advanced Search Field Configuration	Indicates if the "Reassignment Candidate" field is available in the advanced search. This field is restricted.	• Yes • No (default)	**Person Search**

Configuration > [Performance] Settings			
Setting Name	**Setting Description**	**Possible Values**	**Setting Category**
State Advanced Search Field Configuration	Indicates whether the state field criterion is available in the advanced search.	• Yes • No (default)	**Person Search**
Willing To Relocate Advanced Search Field Configuration	Indicates if the "Willing To Relocate" field is available in the advanced search.	• Yes • No (default)	**Person Search**
Willing To Travel Advanced Search Field Configuration	Indicates if the "Willing to Travel" field is available in the advanced search.	• Yes • No (default)	**Person Search**
Years In Industry Advanced Search Field Configuration	Indicates if the "Years in Industry" field is available in the advanced search.	• Yes • No (default)	**Person Search**
Zip/Postal Code Advanced Search Field Configuration	Indicates if the ZIP/Postal Code field is available in the advanced Search.	• Yes • No (default)	**Person Search**

Configuration > Performance > Talent Pools > Talent Pool Template	
Name	**Description**
Matrices	The list of matrices displays the names and codes, as well as the order in which they are displayed in the matrix list and which is the default. Matrices can be added, removed, reordered and the default matrix changed. There should be at least one default matrix available.
Charts	The list of charts displays the names and codes, as well as the order in which they are displayed in the matrix list and which is the default. Charts can be added, removed, reordered and the default charts changed.
History	Includes the date and time, event and description of changes that are made and saved for the matrices and charts settings.

13 Services Administration

Integrating with External Services

Performance provides the ability to integrate with third-party service providers.

Typically the work required for setting up integrations occurs outside of Taleo Performance. A service activation request is received by Taleo Customer support and then the connectivity of the service is made possible through Taleo Passport. This is the development toolkit used to build the certification and interface with a specific business partner.

Once the integration is complete, their settings can be viewed here: **Configuration** > **[Taleo Performance] Administration** > **[Integration] Services** . Apart from labels and default values, most of the settings are only configurable via Taleo Passport.

Settings for integration with third-party development activity providers is found in the Development Planning section. For more details, see *Third-Party Development Activity Provider Support*.

External Service Fields and Forms

Fields and forms are used for sending data to and from the external service and presenting it to the user.

Input Fields

Input fields are used to pass data from Taleo to the service.

The external service controls which input fields are available for each implementation. The values that can be entered into these fields are dependent on what the external service provider offers.

The Input Fields are unique for each service.

Result Fields

A result field is used to display data received from the external service provider, in Performance.

The external service sends one result per service request with result fields. They are specific to the service and are never mandatory. The result fields can be used to build User-defined forms and conditions. They can also be added to PDFs, emails and conditions.

Result Set Fields

A result field is used to display data received from the external service provider, in Performance.

The external service sends more than one result per service request with result set fields. They are specific to the service and are never mandatory. The result set fields can be used to build User-defined forms and conditions. They can also be added to PDFs, emails and conditions.

User-defined Forms

Forms are used to display the results fields and the data returned from the service.

The user-defined form is what is presented to the user in Performance so that they can access the information provided by the service. This can include displaying data from the service on the page, as well as providing links to the service itself.