

SAP - Human Capital Management

Flexible Performance Management Document

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By

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Applies to:

SAP R/3

Summary

The document includes the configuration details of the flexible PMS template which is provided as a standard SAP functionality. The end to end steps will help in understanding the layouts available and accordingly solution can be proposed to the business.

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Standard PMS Document Layouts

The standard PMS layout contains the goals followed by the elements under them. This is the default format available in standard and is only format available up to EHP5. This traditional layout does not provide any option to view the layouts in vertical formats which normally majority of the clients demand.

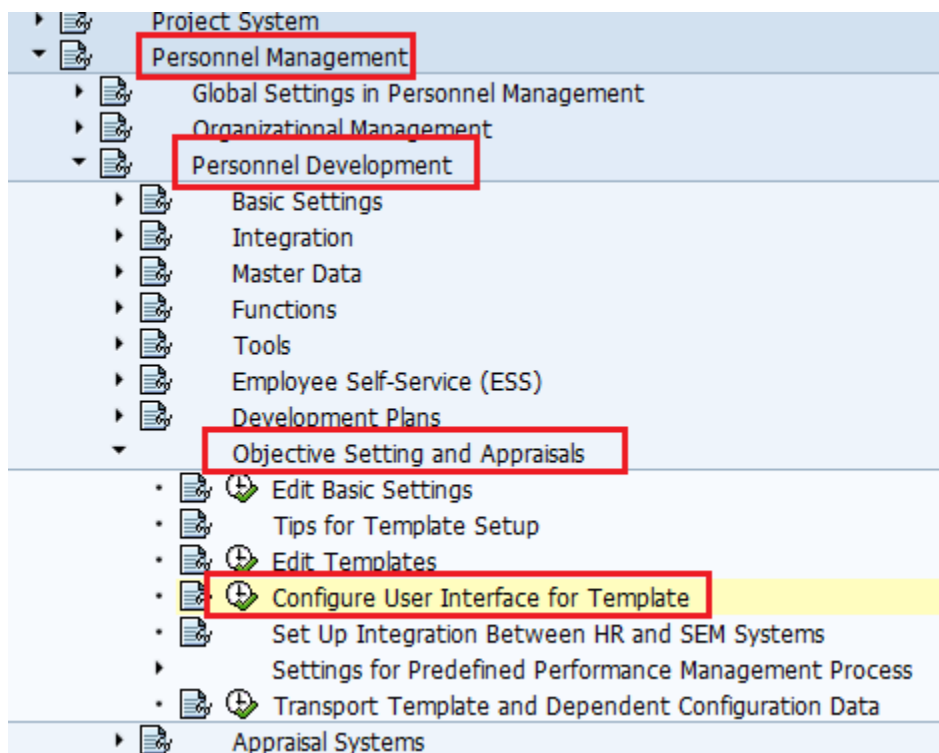
New Functionality

From EHP6 onwards, there are new business functions (HCM_HAP_CI_1) available which provide the facility to configure a PMS template with improvised look and feel and navigation. The same can be found while preparing the template in PHAP_CATALOG.

Once the appraisal template is created in PHAP_CATALOG, the ESS user interface for the template can be configured.

Steps

1. Follow the SPRO configuration nodes as provided in the screenshot.



- On selecting 'Configure User Interface for Template', navigation to an ESS screen will be done. This screen is for configuring the layout of the appraisal document.

Configure User Interface for Template

Save

Delete

Configuration Preview

Category ID:

All

Appraisal Template:

Layout Configuration

Process Configuration

Column Layout

Row Layout

Collapsible Appraisal Elements

Always Show Final Appraisal

Configure Available Elements for Tab

	Element Type	Element ID	Element Name	New Tab Page	New Block	Expanded

3. Select appraisal template. This will enable the layout configuration options- Column Layout and Row Layout.

Configure User Interface for Template

SaveDeleteConfiguration Preview

Category ID:

All

Appraisal Template:

Layout Configuration

Process Configuration

☒ Column Layout

☐ Row Layout

☐ Collapsible Appraisal Elements

☐ Always Show Final Appraisal

4. Click on 'Column Layout'

All the elements of the appraisal template will be displayed for the configuration.

Here the elements can be set as New Tab Page or New Block.

Layout Configuration

Process Configuration

☒ Column Layout

☐ Row Layout

☐ Collapsible Appraisal Elements

☐ Always Show Final Appraisal

Configure Available Elements for Tab

	Element Type	Element ID	Element Name	New Tab Page	New Block	Expanded
▼	Appraisal Template	50012772	PMS -	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
▼	Criteria Group	50012773	Goal Setting	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
	Criteria Group	50012777	Total Wt%	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Criterion	50012784	Enter Objective Title	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Criterion	50012783	Enter Objective Title	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Criterion	50012782	Enter Objective Title	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Criterion	50012781	Enter Objective Title	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Criterion	50012780	Enter Objective Title	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
▼	Criteria Group	50012774	Goal Setting Discussion with Employee	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
	Criterion	50012785	I had a meaningful discussion	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Column Layout result:

2 Goal Setting Discussion with Employee

2.1 I had a meaningful discussion
[Description](#)
 I had a discussion on my Goals for the year 2015 – 16.

2.2 I am clear about the expected outcomes
[Description](#)
 I am clear about the outcomes I am accountable for.

2.3 I am in agreement with the goals set

2.4 Overall Effectiveness
[Description](#)
 Overall, I feel that the PMS was conducted effectively.

2.5 Goal Setting Overall
[Note](#)

Note: Feedback: [Expand Text Field](#)
 Discussion was OK.

Appraisal Document for Anjali Kadam

Save Print Display Qualifications Display Individual Development Plan Display Scorecard Expand Collapse

1 Goal Setting

100

1.1 Enter Objective Title1
[Expand Text Field](#)
 Objectives:
 test 1

1.2 Enter Objective Title2
[Expand Text Field](#)
 Objectives:
 test 1

1.3 Enter Objective Title3
[Expand Text Field](#)
 Objectives:
 test 1

Category	Score	Comments	Target	Actual	Rating	Feedback
Financial	25		18.02.2016	Numbers	51 - 75 %	Met Expectations
Customer	10			No value	76 - 100 %	Met Expectations
Customer	20			No value	100 - 120 %	Exceeded Expectations

<p>2.1 I had a meaningful discussion</p> <p>▼ Description</p> <p>I had a meaningful discussion about my Performance Appraisal.</p>	<p>Disagree</p>
<p>2.2 I explained my achievements clearly</p> <p>▼ Description</p> <p>I had an opportunity to explain my achievements clearly.</p>	<p>Strongly Agree</p>
<p>2.3 I discussed about the limitations faced</p> <p>▼ Description</p> <p>I had an opportunity to discuss about the limitations faced.</p>	<p>Agree</p>
<p>2.4 Areas for development were identified</p> <p>▼ Description</p> <p>My areas for development were clearly identified mutually.</p>	<p>Disagree</p>
<p>2.5 We are clear about my training needs</p> <p>▼ Description</p> <p>My manager and I are clear about my training needs for the coming year.</p>	<p>Strongly Disagree</p>
<p>2.6 The total duration of our discussion was</p>	<p>0-15 Mins</p>

Appraisal Document for Anjali Kadam

How would you like to continue?

- ☒ Save and Exit Document
☐ Complete Review L1

Administrative Data

PMS Overall Performance

	Rating by appraiser	Rating by Reviewer	Appraiser Ranking
3 Overall Performance			
3.1 Overall rating by Appraiser	Exceeded Expectations		4
3.2 Overall rating by Reviewer		Met Expectations	
<p>▼ Note</p>		<p>Note: Rating by Reviewer: Expand Text Field</p>	

Click here to expand the Note field

5. Click on 'Row Layout'

This will enable the traditional PMS layout available in collapsible or expandable form.

Layout Configuration

Process Configuration

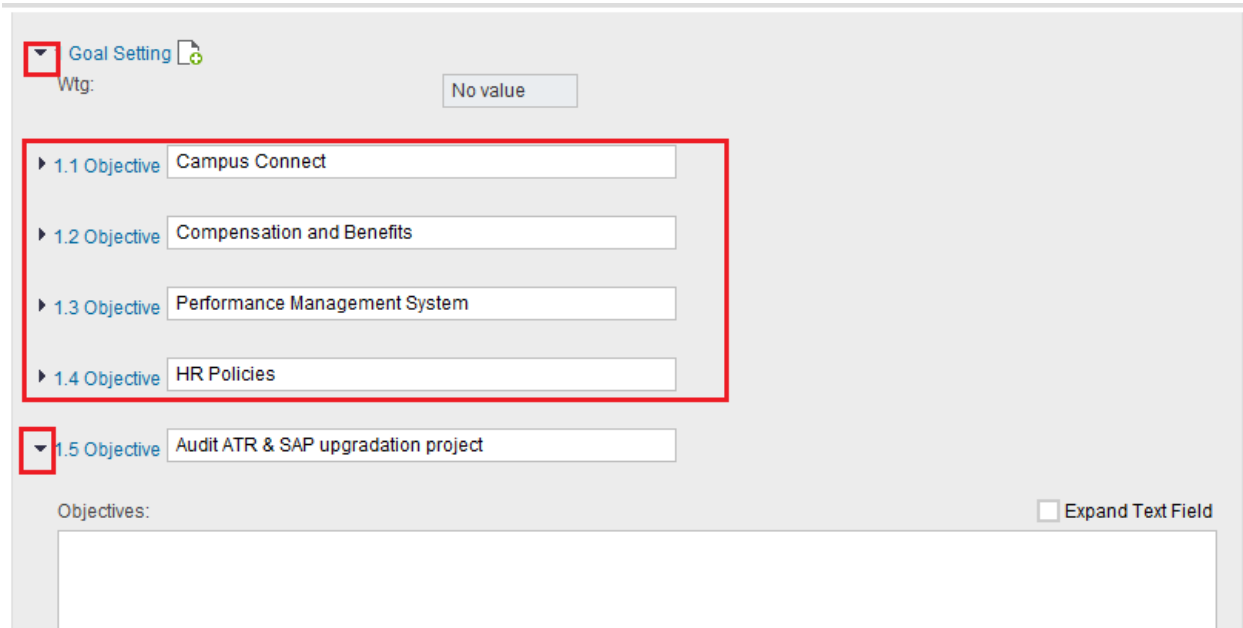
☐ Column Layout
 ☒ Row Layout


☒ Collapsible Appraisal Elements
 ☒ Always Show Final Appraisal

Configure Available Elements for Tab

	Element Type	Element ID	Element Name	New Tab Page	New Block	Expanded	
	Criterion	50031111	I discussed about the problems faced	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
	Criterion	50031110	Critical incidents referred for meeting	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
	Criterion	50031109	Ways to enhance performance discussed	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
	Criterion	50031108	I suggest to Improve discussion by:	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
▼	Criteria Group	50031093	Overall Performance	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
	Criterion	50031114	Overall rating by Appraiser	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	
	Criterion	50031115	Overall rating by Reviewer	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	
▼	Criteria Group	50031095	Attention Please!	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	

Row Layout result:



▼ Goal Setting 

Wtg:

▶ 1.1 Objective

▶ 1.2 Objective

▶ 1.3 Objective

▶ 1.4 Objective

▼ 1.5 Objective

Objectives: ☐ Expand Text Field

Limitations

1. This standard option affects the ESS layout only. There will not be any impact on the offline appraisal document. For the offline appraisal document, separate designing has to be done using Adobe Lifecycle Designer.
2. There is no spreadsheet option available for the column layout options.