Implementation Guide **CONFIDENTIAL**

SAP SuccessFactors Performance and Goals
Document Version: Q2 2018 – 2018-05-18

Performance Management v12 Acceleration

SAP SuccessFactors

Content

What's New in Performance Management

Provides an overview of the most important updates made to this document in recent releases.

Q2 2018

The following table summarizes changes to this guide for the Q2 2018 release

What's New	Description	More Information
June 1		
Added a new topic about understanding "Consolidated e-mail Notifications" feature.	You can use this feature to send out consolidated e-mail notifications at specific time intervals.	Understanding Consolidated e-mail Notifications [page 178]
Added steps on how to use Add Signer, Add Modifier, and Get Feedback feature. Also, listed some of the limitations that the user might come across while using the search functionality in Add Signer, Add Modifier, and Get Feedback.	You can use the *Add Modifier* feature to add a new user to the user defined step of the route map. You can use the *Get Feedback* feature to send an entire form to someone outside the route map for ratings and comments. You can use the *Add Signer* feature to add an additional signee to your form.	Managing Self-Assessment Process for Employees [page 347] Managing Performance Evaluation Process for Managers [page 350]
May 4		
Updated "Select Employees" table in Launch Forms topic.	You can control the visibility of "All active employees" option in the Launch Form wizard.	Launching Forms [page 337]
Added a note to the employee selection step (step 7) in the "Launching Forms" topic.	As an Admin when you are scheduling the launching of forms for a later date or for future recurring dates, you need to consider the fact that the user selection is derived out of the target population on the day of launching the form.	Launching Forms [page 337]
Updated the "Reasons Why Forms Fail to Launch" topic to include the symptom and the solution for routing the form to the originator's inbox and not to the inbox of the user for whom the form is launched.	When you launch the form for a user who doesn't have the basic authorization and the permissions to logon, an "Alternate Route User Step" gets created and the form gets routed to the originator's inbox. You should give the necessary permissions to the user and re-launch the form.	Reasons Why Forms Fail to Launch [page 430]

What's New	Description	More Information
Added a note to the "Deleting a Form" topic.	You can use the "CSV file Upload" functionality to upload randomly selected forms for mass deletion.	Deleting a Form [page 372]
Updated the "Managing Document Visibility" topic with "CSV file Upload functionality" details.	You can use the CSV file Upload functionality in "Manage Document Visibility" tool to restrict document visibility for users using their "User Id".	Managing Document Visibility [page 366]
Updated the "Job Summary in Execution Manager" topic to include the details of the "Mass_Create_Form" job.	The "Mass_Create_Form" job details in "Execution Manager" allows you to analyze the log for the forms scheduled to be launched from the Launch Forms wizard.	Job Summary in Execution Manager [page 345]
Updated the description of "Enable form title editability in the Form" and "Enable form title editability in Form info page" in Form Template Settings.	When this option is enabled, the form title becomes decoupled from the template's name.	Form Template Settings [page 113]
Added a new topic to configure Performance History Portlet in People Profile	You can configure Performance History Portlet to display the performance ratings of the employees in people profile.	Configuring Performance History Portlet in People Profile [page 188]
Added a new topic on the usage of HTML or custom code within the SAP SuccessFactors Application	Adding custom code, java script, CSS and HTML in within the SAP SuccessFactors Application is not supported by our system.	Usage of HTML or custom code within the SAP SuccessFactors Application [page 46]

Q1 2018

The following table summarizes changes to this guide for the Q1 2018 release

What's New	Description	More Information
April 6		
Updated the Retirement Date for Mass Create Form Instances and Manage Scheduled Mass Form Creation	Starting Q3 2018, Mass Create Form Instance and Schedule Mass Form Creation tool will no longer be supported.	Retirement Date for Mass Create Form Instances and Manage Scheduled Mass Form Creation [page 37]
Added a new topic to list out the Limitations of Reverse Rating Scale	This section lists some of the known limitations that you will encounter while using Reverse rating scales.	Limitations of Reverse Rating Scale [page 320]
Added a new topic "Displaying the Rating Score on the Performance Form Calculated Using the Metrics Lookup Table"	In Performance Management, the score calculated through the metric lookup table in the goal plan is populated in the Performance Review form as star ratings.	Displaying Rating Score Derived from Metric Lookup Table [page 141]

What's New	Description	More Information
March 9		
Setting Up and Using Data Protection and Privacy	Data protection and privacy is best when it is implemented suite-wide, and not product-by-product, so we centralized data protection and privacy information content.	Data Protection and Privacy Content is Centralized [page 417]
Legacy data purge function	If you already use the legacy data purge function as part of your current business process, and you are sure that it meets your company's data protection and privacy requirements, you can continue to use it.	Data Retention Management Options [page 417]
Exclude Private Goals in Manage Templates	Updated the Performance Goals: Advanced Options table to include the following information: When this feature is enabled we exclude the private goals when creating a form, also adding a new private objective will not be possible. This is used only in PMv12 Acceleration.	Performance Goals: Advanced Options [page 135]
Exclude Private Goals as an XML attribute in Goals section	Updated the Goals XML Attributes table to include exclude-private-goals attribute.	Configuring the Attributes and the Elements in the Goals Section [page 254]
Get Feedback functionality	Added the following note to the Get Feedback section: **Note** Get Feedback functionality is not available when the form is in the Collaborative step.	Configuring Get Feedback Button on Form [page 389]
Launching Forms	Added a note to recommend users not to schedule probation forms with hire date as 0 days.	Launching Forms [page 337]
Show gap analysis for behaviors and competencies in the Summary section of the form	Updated the Elements table to include descriptions for the following elements: show-gap-competencies-in-summary, allow-close-individual-gap-in-summary, show-gap-behaviors-in-summary show-behaviors-in-summary	Configuring the Attributes and Elements in the Summary Section [page 278]
Spell Check	A new topic has been added to describe the Spell Check tool. You can use the Spell Check tool to make sure that the comments you've entered in a form are spelled correctly.	Spell Checker [page 79]
Launching Forms	Added a note to recommend users not to launch forms with hire date as 29th February.	Launching Forms [page 337]

What's New	Description	More Information
Verifying Settings in Provisioning Before the Upgrade	Added a new topic to list out all the recommended settings in Provisioning that should be enabled before proceeding with the Performance Management V12 Acceleration upgrade.	Verifying Settings in Provisioning Before the Upgrade [page 31]
FAQ: Upgrading to Performance Management V12 Acceleration	Added the following to the FAQ table: How do I know if I have the latest version of Performance Management v12 Acceleration?	FAQ: Upgrading to Performance Management V12 Acceleration [page 29]
Rating and Comments for Behaviors	Created a table to list out all the attributes for rating by behaviors similar to the "Competency & behavior matrix table with attributes"	Rating and Comments for Behaviors [page 241]
Form Introduction Section Type	Updated the list of supported HTML tags. Added new tables for "Form Introduction Section Type" Elements and Attributes.	Form Introduction Section Type [page 224]
fm-sect-config (Additional Form Section Config Options)	Updated rating-label and rating-label-others field in the "Elements (partial list)" table.	fm-sect-config (Additional Form Section Config Options) [page 309]
Team Overview	Added the following note to the Team Overview section: When a Manager transfer is triggered, the old Manager's rating even though the old Manager has not rated the employee, will appear on the Team Overview page.	Team Overview [page 381]
Team Overview	Added the following note to the Team Overview section: When manual-rating is set to true in the Summary Section of the form, the *Team Overview* page will display the manual rating and not the scale-adjusted rating.	Team Overview [page 381]
Document Transfer with Out of Turn Access	Added the following note to the "Document Transfer with Out of Turn Access" section: If the manager change takes place in OOTA step (EM1 step), upon routing of the form, only the new manager's draft is merged with the form. This means old manager's draft comments in the OOTA step will not be visible to the new manager when the form is routed to the next step (EM2 step). If the manager change takes place in the manager step (EM2 step), all comments entered by the old manager are preserved and saved.	Document Transfer with Out of Turn Access [page 100]

What's New	Description	More Information
Working with Ad-hoc Reporting	Added the following note to the "Working with Ad-hoc Reporting" section: Ad Hoc reporting only supports up to 4,000 characters for textarea fields. If you have configured a textarea field to have a maximum character count to be > 4,000, you will only be able to report on the first 4,000 characters entered. It is a known limitation that ad hoc reports only supports reporting on ~4,000 characters due to DB limitations. By design, ad hoc report pulls the data from FEEDBACK table, which has the limitation of 4000 character and Performance Management form pulls the data from form content blob, hence the difference in form and ad hoc reports.	Working with Ad-hoc Reporting [page 394]
Custom Fields	You can use Custom fields to add additional information in the Performance form.	Custom Fields [page 170]
Synchronizing Performance Management Form to Show Correct Reporting Labels in Ad Hoc Reports	For a completed form, the Matrix Grid Scale rating label in the Ad Hoc reports displayed the rating label, which was updated after the form was completed, whereas the Performance Management form did not get updated with the new rating label and still displayed the old rating label. This lead to a discrepancy between the Ad Hoc reports and the Performance Management form with respect to the Matrix Grid Scale label.	Synchronizing Performance Management Form to Show Correct Reporting Labels in Ad Hoc Reports [page 405]
Configuring the Attributes and the Elements in the Goals Section	Updated the guide to remove "obj-sect-plan-id" as this attribute is nolonger supported.	Configuring the Attributes and the Elements in the Goals Section [page 254]

Q4 2017

The following table summarizes changes to this guide for the Q4 2017 release

What's New	Description	More Information
November 16		
Using the Notes Block Feature in Performance Management v12 Acceleration	You can use the *Notes Block* feature in *Employee Files* to leave notes for a user, if you are granted with the permission to create notes.	Using the Notes Block Feature in Performance Management v12 Acceleration [page 392]

What's New	Description	More Information
Configuring Character Count Limitations	Added a note in to indicate that 4000 bytes is not always equal to 4000 characters. In case of single byte languages 4000 bytes is around 4000 characters, each byte take up one character. For example, English, French, Italian, and so on. In case of multi-byte languages 4000 bytes is not always equal to 4000 characters. Each character in multi-byte languages can take up to 2 to 3 bytes. This reduces the 4000 bytes count to 1300 characters approximately. For example, Chinese, Japanese and, so on.	Configuring Character Count Limitations [page 215]
Role Based Permissions in Performance Management	Added a ist of all the Performance Management v12 Acceleration functionalities that requires you to enable role based permissions.	Role-Based Permissions for Performance Management [page 57]
November 02		
Displaying Achievements on the Performance Management Form under the Achievements tab	For the achievements to appear on the Performance form you need to make sure that the achievements are dated in the timeframe that the form is launched for.	Integration with Continuous Performance Management [page 375]
Mobile Performance Management Feature Support	Updated the "Mobile Performance Management Feature Support" table. This section lists out all the Performance Management features that are supported by **Mobile Performance Review**.	Mobile Performance Management Feature Support [page 409]
User Consent in Performance Management	When a product is used to gather personal data from external users, a specific user consent is required. In Performance Management the only use case for user consent is when requesting feedback from external users, using *Ask for Feedback* functionality.	
Localization of Rating Scale Description Columns in Ad Hoc Reports	Localization of the Rating Scale description columns in Ad Hoc reports led to data discrepancy between the rating scale description on the form and the Ad Hoc Reports whenever the rating scale description were changed after the form was launched. To address this issue, all 20 existing rating scale description columns used in Ad Hoc reports will now show the rating scale descriptions which were configured at the time of form launch, in the default locale.	Localization of Rating Description Columns in Ad hoc Reports [page 401]
Known limitations in Rating Scale description columns	This section lists some of the known limitations that you will encounter with the Rating Scale description columns in Ad Hoc reports.	Limitations [page 404]

What's New	Description	More Information
Added topics for Data Retention Management in Performance Management	**Caution** As of Q1 2018, the data purge function with data retention time management (DRTM) is now generally available. Limitations placed on this function during its earlier "beta" release have been removed. You can now use DRTM to permanently purge data from your Production system, for individual users or for multiple users at a time.	
Team Overview Filter	The filter on the Team Overview page, next to the Performance form, allows you to filter the employees in your team based on their relationship with you as their rater.	Team Overview [page 381]
Enabling Performance Management v12 Acceleration from the Upgrade Center Important Factors to Consider Before Upgrading to Performance Management v12 Acceleration	Updated the "End of Maintenance and End of Life Updates for Performance Management v11 and old v12" section to include the following topics: • Important Factors to Consider Before Upgrading to Performance Management v12 Acceleration: You should consider some of the important factors before upgrading to Performance Management v12 Acceleration through Upgrade Center. • Configuration Impact to Expect • Major Features and Benefits of Upgrading to Performance Management v12 Acceleration • FAQ: Upgrading to Performance Management V12 Acceleration • Converting Official Rating Configurations in Performance Management v12 to Rating Options for Performance Management v12 Acceleration	Important Factors to Consider Before Upgrading to Performance Management v12 Acceleration [page 25] Configuration Impact to Expect [page 26] Major Features and Benefits of Upgrading to Performance Management v12 Acceleration [page 27] FAQ: Upgrading to Performance Management V12 Acceleration [page 29] Converting Official Rating Configurations in Performance Management v12 to Rating Options for Performance Management v12 Acceleration [page 35]
Configuring Custom Roles Using Manage Templates	Added a new section on how to configure Custom Roles using Advanced Options in Manage Templates.	Configuring Custom Roles Using Manage Templates [page 167]

What's New	Description	More Information
Manage Competencies	Updated "Manage Competencies" section to include the following topics: • Prerequisites to Set Competencies as Core Competencies • Accessing Competencies • Adding a New Competency Library • Editing Competencies • Performance Details • Adding a New Competency • Modifying Competencies using the Actions Menu • Editing Performance Details • Adding a New Competency Category	Accessing Competencies [page 70] Adding a New Competency Library [page 71] Editing Competencies [page 72] Performance Details [page 73] Editing Performance Details [page 73] Adding a New Competency [page 74] Adding a New Competency Category [page 75] Modifying Competencies using the Actions Menu [page 75]

Q3 2017

The following table summarizes changes to this guide for the Q3 2017 release

What's New	Description	More Information
October		
Data Purge in Performance Management and 360	You can use Data Purge to permanently delete user data. You can delete the Performance Management or 360 Form templates, the users, and their relating data.	All Data Privacy and Protection content has been centralized.
Viewing Job Summary in Execution Manager	A note has been added to indicate that the process instance type, Mass_Create_Form, displays the job summary of the forms that are launched using either Launch Forms tool or Mass Create Form Instance tool.	Viewing Job Summary in Execution Manager [page 346]
Integration with Continuous Performance Management	Removed the following note as it is no longer required: **Note** The permission for Admin access to MDF OData API must be enabled for both employee and manager roles to ensure that the Edit and Delete buttons are available while using Continuous Performance Management via the Web client.	Integration with Continuous Performance Management [page 375]

What's New	Description	More Information
Custom-sect	A note has been added to indicate that you can configure more than one custom section within the same Performance Management form. However, it is recommended that you do not configure too many custom sections within the same form.	Custom-sect [page 291]
Errors Encountered While Opening a Form	The following point has been added to thechecklist to test if the form is working correctly: Check whether the Performance Management form contains a goal plan or learning activity plan that the user has not been granted permission to. Also, check the goal plans which are included in the Performance Management Form XML, and ensure the impacted user has permission to these goal plans.	Errors Encountered While Opening a Form [page 419]
Validating Your Existing Templates for Compatibility with Performance Management v12 Acceleration	You will have the ability to update your Performance Management v11 or Performance Management v12 template to a Performance Management v12 Acceleration template using our Validation Utility.	Validating and Updating Existing Performance Management Forms [page 33]
August 4		
Job Summary in Execution Manager Viewing Job Summary in Execution Manager	You can now monitor the details of a running *Mass_Create_Form* job from Execution Manager. You can now view the current status of the forms that are launched, and information about the job execution status, in terms of number of forms that are completed, in-process, and the forms that have errors from the Execution Manager.	Job Summary in Execution Manager [page 345] Viewing Job Summary in Execution Manager [page 346]
Route Forms	A note has been added to indicate that you can now route forms to employees with inactive assignments within the Route Map, and any future steps involving those employees will appear in the Route Map. Also, the full name of these employees, now appears on the relevant steps of the Route map	Route Forms [page 355]
Route Forms	A note has been added to indicate that if you search by selecting *Subject User*, *Form ID* or *Form Template* in the *Search By* field: you will be prompted to search by the employee name, input a Form ID, or select a Template for search. This allows you to use more relevant and specific search criteria to search for forms within the *Route Forms* and *Modify Form Route Map* tools.	Route Forms [page 355]

What's New	Description	More Information
Supported HTML for Performance Management v12 Acceleration Forms	When you work on a Performance Management v12 Acceleration form, there are chances that you might come across the following error message: *The only tags supported are [p, a, strong, em, u, ol, ul, li, font, img, blockquote]*. Refer this topic for proper formatting of HTML for Performance Management v12 Acceleration forms.	Supported HTML for Performance Management v12 Acceleration Forms [page 47]
overall-rating-display-order="calc-manual" Not working in OCOC summary section	When you set `overall-rating-display-order="calc-manual"`, create and open a Performance form, go to OCOC summary section, and check the order of manual and calculated rating for each section, the rating order should be calculated-manual `calc-manual` and not `manual-calc`. Currently, the rating order is manual-calculated.	Elements [page 303]
Adjusted Objective Rating and Adjusted Competency Rating in objcomp-summary-sect is not supported	Currently it's not supported in Performance Management v12 Acceleration form.	Elements [page 303]
Rating Option on the PDF and Print Version of Performance Management Form	A note has been added to indicate that Rating Label on the PDF and Print Version of the Performance Management Form is displayed as *Rating* and is not followed by the employee name.	Rating Option on the PDF and Print Version of Performance Management Form [page 161]
Configuring E-Mail Notification Templates Settings	A table has been added to list out all the E-Mail Notifications that are used in Talent Foundation and Performance Management. Also, a topic has been added on how to enable a particular notification and customize the settings for one or more form templates.	List of E-Mail Notifications in Performance Management [page 180] Customizing Settings for Form Templates [page 179]

Q2 2017

The following table summarizes changes to this guide for the Q2 2017 release

What's New	Description	More Information
June 23		
Configuring Character Count Limitations	Added a note that Ad Hoc reporting only supports up to 4,000 characters for textarea fields. If a customer has configured a textarea field to have a maximum character count to be > 4,000, they will only be able to report on the first 4,000 characters entered.	Configuring Character Count Limitations [page 215]
May 19		

What's New	Description	More Information
1:1 meeting in the Route Map	enable 1:1 Meeting option in the Modify step of the Route Map	Route Maps [page 82]
Reasons Why Forms Fail To Launch	Most common causes why forms fail to launch.	Reasons Why Forms Fail to Launch [page 430]
Troubleshooting Errors Encountered in Required Fields	Common errors encountered while setting, configuring and using required fileds in the Performance Management form.	Troubleshooting Errors Encountered in Required Fields [page 436]
May 5		
Attributes of the Competency Section	The Behavior Modes in the *Attributes of the Competency Section* table has been updated. The Behavior Modes decide how the competency behaviors get displayed in the Competency Section of the form.	Attributes of the Competency Section [page 231]
Ask for Feedback Responses in Supporting Pod to be Viewed by Additional User Roles	All the users with access permission to the Performance form can view the *Ask for Feedback* responses, in Supporting Information Pod.	Ask for Feedback: Supporting Pod Permissions for Additional Roles [page 384]
Out of Turn Access Permission	New sections have been added to describe the Out of Turn Access feature, procedure to grant Out of Turn Access permission to the Reviewer Roles, and the related sequence of events that occur when Out of Turn Access permission is granted to the Reviewer Roles. Out of Turn Access allows Reviewer Roles to access a copy of the Performance form via Team Overview page for their own rating before the form officially reaches them.	Out of Turn Access (OOTA) Permission [page 95]
Required Fields	Required fields or mandatory fields are details that you must fill before the submitting a form. Added a section that describes how to configure Required Fields in a Performance Form.	Required Fields [page 169] Configuring Required Fields [page 170]
Enable PM Form Search Competencies	A note has been added to indicate that the *Enable PM Form Search Competencies* feature is not supported in Performance Management v12 Acceleration.	Self-Enable Features [page 185]
Do not send document routing notification option in Route forms.	You can now prevent sending such e-mail notifications to the users, before performing any routing actions by enabling *Do not send document routing notification* option.	Multi-selection of forms in Route Forms [page 357]
Deleting a Form	A new section has been added on how to delete individual Performance Review forms and bulk-delete multiple forms.	Deleting a Form [page 372]
Restoring a Deleted Form	A new section has been added on how to restore a previously deleted form.	Restoring a Deleted Form [page 373]

Q1 2017

The following table summarizes changes to this guide for the Q1 2017 release

What's New	Description	More Information
February 10		
Restructured Route Maps	The Route Maps section has been restructured to provide clarity. There are now three topics that explain how you can create, modify and associate a Route Map with a form. Route Maps provide a pre-define approval process for a Performance Review. This ensures all employees follow the same Performance Review process. When you associate a Route map with a Form Template, all forms created using the Form Template follow the same workflow.	Route Maps [page 82] Creating a Route Map [page 84] Associating a Route Map with a Form Template [page 93]
Mobile Performance Reviews in Phase 1	A new section has been added to outline what is supported in Mobile Performance Reviews in Phase 1. Selected features, of Performance Management forms are now available for users in the SAP SuccessFactors Mobile Application.	Mobile Performance Reviews [page 406]
Disabling the External e-mail Address Feedback Option from Form Template Settings	A new section has been added on how to Disabling the External e-mail Address Feedback Option from Form Template Settings By default, the "Ask for Feedback" page allows managers to request feedback from internal employees and external stakeholders. Now, you can choose to gather feedback from internal employees only. In which case, the option for external stakeholders will not be displayed. To hide "Add external e-mail address" field select the "Admin Center-> Form Template Settings -> Disable the external e-mail address feedback option.	Disabling the External Email Address Feedback Option [page 387]
Accessing Stack Ranker Using Stack Ranker	The screenshots on the existing section on Accessing Stack Ranker have been updated. Also, a new section on Using Stack Ranker has been added. Accessing the standalone Team Rater (Stack Ranker) from the To-Do List on the home page, from an individual Performance Management form and also from the Team Overview page. Using the Stack Ranker to enter or modify ratings, add notes and to view overall rating of the employees.	

What's New	Description	More Information
Enable Performance Management Access Permission	*Enable Performance Management Access Permission* switch description has been updated in the existing Description of Feature Switches section to provide clarity and details on visibility of the *Performance* tab. Performance Management Access Permission is a feature that allows customers to hide the Performance tab from certain employees.	Self-Enable Features [page 185]
Reversing Rating Scales	Updated the description for *Reversing Rating Scales* Use the reverse-scale option to not only reverse the order of the rating scale so that 1 is a high score and 5 is a low score, but also the values.	Reversing Rating Scales [page 319]
Enabling Metadata Framework Permission	Added *Enabling Metadata Framework Permission*information in *Viewing Continuous Performance Management Achievements Feedback on the Performance Form* Continuous Performance Management is built on Metadata framework, so to access the Continuous Performance Management entities, such as Achievements and Feedback on Achievements, Metadata Framework Permission must be enabled.	Integration with Continuous Performance Management [page 375]
Enabling Metadata Framework Permission	*Enabling Metadata Framework Permission* has been added in *Integration with Job Profile Builder (JPB)* section. The Matrix Manager would need the Metadata permission for the employee so that they can see the Job Profile Builder (Metadata Framework) data tied to the employee.	Integration with Job Profile Builder (JPB) [page 379]
Get Feedback	Updated the screenshots and the steps to configure *Get Feedback* button on the Performance Form. Get Feedback feature allows a rater to send an entire form to someone outside the route map for ratings and comments. It is an opt-in feature in Performance Management v12 Acceleration.	Configuring Get Feedback Button on Form [page 389]

Q4 2016

Changes to this Guide in Q4 2016

What's New	Description	More Information
October 10		

What's New	Description	More Information
View the feedback provided on CPM Achievements from the respective 'Achievements' tab on the Performance Form.	If you link Continuous Performance Management Achievements to Performance and Development goals, the linked Achievements and the respective feedback will now be available on the Performance Review form, under the 'Achievements' tab in the 'Performance Goals' and 'Development Goals' sections, respectively.	Integration with Continuous Performance Management [page 375]
'Ask for Feedback' data has been added to the Performance Management schema in Ad Hoc Reporting.	As a result, you can now view 'Ask for Feedback' information like who requested the feedback, when it was requested and who responded. Note that this will not include the actual content of the feedback provided.	Refer Step 11 Creating an Ad-hoc report [page 395]
The document structure has been revised and updated.	This has been done to introduce a sequence in the flow of content and to improve readability.	
Working with Ad Hoc Report	Steps to Configure, Creat and Run Ad Hoc reports are covered in this chapter	Working with Ad-hoc Reporting [page 394]
Form Template Settings	'Form Template Settings' table has been update	Form Template Settings [page 113]

Q3 2016

Changes to this Guide in Q3 2016

What's New	Description	More Information
August 5		
Viewing the linked Continuous Performance Management Achievements directly on Performance Management v12 Acceleration Form	If you link Continuous Performance Management Achievements to Performance and Development goals, the linked Achievements will now be available on the Performance Review form, under the 'Achievements' tab in the 'Performance Goals' and 'Development Goals' sections, respectively.	Integration with Continuous Performance Management [page 375]
Configuring visibility of the 'Achievement' tab	The 'Achievements' tab will be available in 'Performance Goals' section (Objective section) and 'Development Goals' section. You can now configure the XML template to control the visibility of the tab.	Form Tab Configuration and Visibility Control [page 366]
Launching Forms for multiple employees using CSV upload	You can now Launch Forms immediately for multiple users using only their user IDs, via CSV upload.	Launch Forms Immediately for Multiple Users Using CSV Upload [page 339]
Working with Custom Elements in Performance Management v12 Acceleration Forms	You can add custom elements in your Performance Forms using Manage Template, and configure the custom elements such that you can update them when you Launch Forms.	Editing Introductory Text for Custom Texts and Updating Custom Elements in the Launch Forms Process [page 342]

What's New	Description	More Information
Using the HR Rep. Change rule in Employee Change Engine	You can define the HR Rep. Change rules in Employee Change Engine for automatic document transfers and document changes, when the HR Representative for an employee changes.	Configuring Change Engine for HR Representative Change [page 174]
Documents Transfer	You can manually transfer the forms of employees when their managers change, using the Documents Transfer tool.	Transfer Forms to New Manager [page 370]

Q2 2016

Changes to this Guide in Q2 2016

What's New	Description	More Information
June 23		
Note for 'Disable Download button'	Added a note that the 'Disable Download button' setting is applicable only for PM v11 forms, not for PM v12 or PM v12 Acceleration forms.	Form Template Settings [page 113]
June 3		
Rating Calculation	Added information on configuring and using different rating calculation.	Rating Calculation [page 150]
May 27		
Features and Configuration Options	Restored the section that shows you features and configuration options per Performance Management product type.	Performance Management Product Types and Supported Feature/Option/Section [page 38]
Configuring and controlling visibility of form tabs	You can now configure the XML template to control the visibility of form tabs.	Form Tab Configuration and Visibility Control [page 366]
Configuring Compensation section in Performance Review forms	You can now configure the Performance Review forms to include the Compensation section, and provide a link to the Compensation form.	Configuring Performance Review Form for Compensation Section [page 295]
Rating Options	Restructured the content - the Rating Options, which were earlier described in a table are now available as sections within the topic.	Rating Options [page 156]
Editing Introductory Texts for Custom Sections in Launch Form process	Using Manage Templates, you can configure the custom sections in forms to be able to edit their Introduction text during the Launch Form process	Editing Introductory Text for Custom Texts and Updating Custom Elements in the Launch Forms Process [page 342]
Mass Routing of Forms	You can now route multiple forms that are based on different templates, at once, using CSV upload.	Mass Routing of Forms Using CSV Upload [page 359]

Retiring Features

End of Maintenance and Retirement Date Updates for Performance Management v11 and old v12

SAP SuccessFactors Performance Management has enhanced its latest UI version, Performance Management v12 Acceleration, in line with the overall SAP Fiori design standards, and is recommended for use by all customers now. All major functional gaps between the older (v11, old v12) versions and the v12 Acceleration version were closed with the Q3 2015 release.

Planning Update

- All major functional gaps between Performance Management v11 and old v12 and Performance Management v12 Acceleration were closed, as of the Q3 2015 Release.
- No additional functional or feature enhancements will be made to Performance Management v11 and old Performance Management v12.

Important Dates

- **End of Development Phase**: The time leading up to the end of maintenance for a feature or version. During this time, no new features or enhancements will be delivered and only high priority bug fixes will be considered. There is no change in customer support during this phase. Customers are encouraged to start planning their upgrade for the feature or version.
  Since Q3 2015, functional enhancements are not being made for the old Performance Management v12 and v11 versions.
- **End of Maintenance**: The date after which no further bug fixes or patches will be delivered for the feature or version. Customer support is limited to how-to help.
  Official **End of Maintenance** for Performance Management v11 and old Performance Management v12, is planned for the **Q2 2018 Release**
  No patches will be made after the Q2 2018 production release date.
- **Retirement Date**: The date after which the feature or version is permanently disabled and no longer supported.
  Official **Retirement Date** for Performance Management v11 and old Performance Management v12 is planned for the **Q2 2019 Release**.
  Starting Q3 2019, Performance Management v11 and old Performance Management v12 will no longer be supported.

PM v12 Acceleration: What Is It?

This significant upgrade brings many features from Performance Management v11 to the Performance Management v12 look and feel. Performance Management v12 Acceleration will be the version of the Performance Management product that will continue to be developed with new features and enhancements.

What's Next?

- **Visit the Customer Community**
  A blog post 'End of Maintenance and End of Life for PM v11 and old PM v12' has been created on the Customer Community portal. Please use this blog post to ask any questions that you might have about the End of Maintenance and End of Life initiative.
- **How can you get Performance Management v12 Acceleration?**
  - If you are a new customer to SAP SuccessFactors, Performance Management v12 Acceleration is implemented to your instance by default.
  - If you are currently using Performance Management v11 or the old Performance Management v12, we recommend you to start your product upgrade process. You need to contact SAP Cloud Support, Professional Services or a partner to enable *Performance Management v12 Acceleration* in Provisioning. For more information, see Enabling Performance Management v12 Acceleration from Provisioning [page 63].

    > **Note**
    >
    > This is only enabling the feature, it does NOT include the actual creation of templates or the migration of any existing templates, plans and processes you may have used in the past.

    We recommend that you engage our Professional Services team or Partner Services when implementing any new business processes.
- **What is the cost?**
  - If you are already using Performance Management, you can upgrade to the latest version without paying any additional license fee. You only have to pay in case you require consultancy and assistance to upgrade due to the complexity of your processes and configurations.
    If you are using standard configurations, we do provide a conversion tool to enable you to convert your templates for free. See Validating and Updating Existing Performance Management Forms [page 33].

> **Caution**
>
> Once you upgrade an instance to Performance Management v12 Acceleration you cannot revert back to Performance Management v11 or Performance Management v12.

Important Factors to Consider Before Upgrading to Performance Management v12 Acceleration

You should consider some of the important factors before upgrading to Performance Management v12 Acceleration through Upgrade Center.

- **External Assistance with Upgrade (Professional Services)**: As a customer, you do not have access to Provisioning. You need to contact SAP Cloud Support, Professional Services or a partner to enable *Performance Management v12 Acceleration* in Provisioning. For more information, refer to Enabling Performance Management v12 Acceleration from Provisioning [page 63].
- **Launching Forms**: Upgrading will mean that ONLY Performance Management v12 Acceleration forms can be launched in the company instance. Customers who have been using PM v11 and Old PM v12 versions in one company instance will no longer be able to do so.
- **Timing Considerations**: If you plan to launch forms, you should wait until the Performance Review process is complete prior to enabling Performance Management v12 Acceleration in Production.
- **En Route and Completed forms**: All in-process and completed Performance Management forms will look and behave the same way they did before the upgrade.
- **Test Environment**: You should consider enabling Performance Management v12 Acceleration through the Upgrade Center in your Test environment first, and test the upgraded Performance Management forms before enabling it in the Production environment. If you do not have a Test environment, contact the SAP Cloud support.
- **Scheduled forms**: You will not be able to launch forms or even schedule form launches as templates will be locked until form templates are made compatible. If you launch forms based on anniversary dates or other scheduled form launches, these Performance Management v11 forms will not be launched. The new upgraded template will need to be set up again for scheduled form launches.
- **New Form Templates and Impact to Existing Processes**: Upgrading to Performance Management v12 Acceleration does mean new form templates will be created by the Validation Tool. This impacts existing scheduled forms, automated jobs, custom reports, custom exports or any other activities that were linked to the Performance Management v11 or old Performance Management v12 form template.
- **New Form Look and Feel and Change Management (Performance Management v11 form users only)**: The user interface of Performance Management v11 is different from the user interface of Performance Management v12 Acceleration.

  > **Tip**
  >
  > We recommend that you should upgrade to Performance Management v12 Acceleration. For more information, refer to Validating and Updating Existing Performance Management Forms [page 33].

- **Dashboards and Reports**: You should update the Dashboards and the reports to reference any new form templates.
- **Consistency of Form Templates Used Throughout the Year**: If the company used similar form templates for quarterly or midyear reviews during the year, then we recommend you to continue with Performance Management v11 to complete the end of year review cycle.
- **Other Form Types**: 360 MultiRater and other non-Performance Management form types are not impacted by Performance Management v12Acceleration. They will remain exactly the same as before the upgrade. The easiest way to tell if a form will be impacted by Performance Management v12 Acceleration is by looking at the list in *Admin Center* > *Form Template Settings*. All templates with *Performance Review* in the *Type* column will be impacted by Performance Management Acceleration.

- **Irreversible Decision**: This is a one-way upgrade in the Production environment. As mentioned above, you should enable Performance Management v12 Acceleration first in the Test environment.

  > **Note**
  >
  > When Performance Management v12 Acceleration is enabled, neither Performance Management v11 nor old Performance Management v12 forms can be launched.

  To understand the changes in Performance Management v12 Acceleration, it is recommended that you spend time testing the v12 Acceleration version in your Test environment.

  > **Caution**
  >
  > However, it is important to note that the Official **End of Maintenance** for Performance Management v11 and old Performance Management v12, is planned for the **Q2 2018** Release. Also, starting **Q3 2019**, Performance Management v11 and old Performance Management v12 form launches will no longer be supported.

Configuration Impact to Expect

Old Performance Management v12 and v11 customers should be aware of changes to how rating configurations are now handled within Performance Management v12 Acceleration.

Official Ratings

- In Performance Management v12 configuration to determine which role has influence over the final rating of record is configured by granting permission to the “official rating.” This is no longer supported in Performance Management v12 Acceleration.
- In Performance Management v12 Acceleration, we use rating options, which first determine which roles will have access to rate at all, and affect the rating of record. More information is available in the job aid Converting Official Rating Configurations in Performance Management v12 to Rating Options for Performance Management v12 Acceleration [page 35].

Others’ Ratings Tab

- The Others’ Ratings tab displays all ratings other than those of the employee(form subject) and the logged-in user.
- The ratings in this tab could be displayed or hidden individually in Performance Management v12 (that is, “Show the HR Manager’s rating, but not the Matrix Manager’s rating.”) This granular control is not supported in Performance Management v12 Acceleration.
  Instead, in Performance Management v12 Acceleration, the tab can be hidden for the entire form using a new permission configured in Manage Templates. This permission can be set differently per role or route map step. Refer the *Other's Rating Tab Permissions* section, in the General Settings - Advanced Options [page 125] topic.

- The Performance Management v12 Acceleration Validation Tool will automatically set permissions to hide the Others'Ratings tab from all users.
  Refer, Validating and Updating Existing Performance Management Forms [page 33].
- ➜ Remember

  Even in workflows in which several users make updates to the same rating (rating of record), Performance Management v12 Acceleration will record each user's ratings in the Others' Ratings tab.

Major Features and Benefits of Upgrading to Performance Management v12 Acceleration

Performance Management v12 Acceleration optimizes the user experience of the Manager and Admins.

After the upgrade, as a Manager or an HR Admin you can now use the following pods to access key data and gather supporting materials to write better reviews for the employees:

- Supporting Info Pod: Read others' feedback about the employee's performance
- Gap Analysis Pod: To view the gap between the manager's ratings and the employee's ratings. Understand the upgrades and downgrades in ratings against the employee's self rating.
- Team Ranker Pod: Stack rank during the review

To learn more about the features, sections and options that are supported by the Performance Management v12 Acceleration version, refer to Performance Management Product Types and Supported Feature/Option/Section [page 38].

Some of the major Performance Management v12 Acceleration features are listed below:

Get Feedback

The *Get Feedback* button allows users to add other users to the review process to provide feedback on the review form. Additional settings determine whether the users who provide feedback will get a copy of the completed form in their completed folder.

Add Modifier

Old Performance Management v12 customers can now use the *Add Modifier* button in Performance Management v12 Acceleration to add other users to the review process to provide feedback and ratings on the review form. The users who provide feedback will get a copy of the completed form in their completed folder.

Add Signer

Old Performance Management v12 customers can now use the *Add Signer* button to add other users outside of the defined route map to sign off on a form in the Signature stage.

EZ-Rater

Old Performance Management v12 customers can now use the EZ-Rater for real-time comparisons. With the option to display Employee self-ratings and Manager ratings side-by-side, you potentially have all the information you need in a single view to do instant comparisons within the review form. The Gap Analysis graph highlights the differences between the Employee and Manager ratings.

Show Group Matrix

Groups are an attribute that can be turned on in an Objective or Competency section. It is a way of assigning a dropdown value to each competency or objective. Groups were very useful for assigning attributes to goals or competencies. The advent of custom fields with dropdown lists has made groups obsolete for the most part.

Table of Contents on Form

The *Table of Contents* on Form refers to the left-hand navigation that currently displays the form sections on Performance Management v11 forms.

Custom Print Layout

The Custom Print Layout works in conjunction with the customer engaging with the Custom Reporting team to build specific form data layouts for printing the performance review.

Limitations of Peformance Management v12 Acceleration

- **Combined Sections with Hidden Section Headers**
  In Performance Management v11, multiple sections can be "combined" by removing the section name header for each section so that a larger continuous section may be comprised of two or more sections. This is not yet supported in Performance Management v12 Acceleration.

FAQ: Upgrading to Performance Management V12 Acceleration

You can refer list of Frequently Asked Questions and Answers before upgrading to Performance Management V12 Acceleration.

<table>
<tr><th>FAQ</th><th>Answers</th></tr>
<tr><td>How do I know if I have the latest version of Performance Management v12 Acceleration?</td><td>To find out whether you have the latest version of Performance Management v12 Acceleration:

1. Go to Admin Center > Release Center > Upgrade Center.
2. Under the Recommended Upgrades section, look for PM v12 Acceleration.

Note

You will ONLY see this option if you haven't enabled PM v12 Acceleration from Provisioning.

To enable PM v12 Acceleration in Provisioning, contact SAP Cloud Support, Professional Services or a partner.

After PM v12 Acceleration is enabled in Provisioning, you will no longer see PM v12 Acceleration under Recommended Upgrades. This means you have the latest version of Performance Management v12 Acceleration.

You can now continue to work with the updated Performance Management templates from Admin Center > Manage Templates.

For more information on "Validating and Updating Existing Performance Management Forms to Performance Management v12 Acceleration ", refer to Validating and Updating Existing Performance Management Forms [page 33]</td></tr>
<tr><td>Will I need to engage with SAP Cloud Support or Professional Services to upgrade to Performance Management V12 Acceleration?</td><td>You need to create a Support ticket or contact SAP Cloud Support, Professional Services or a partner to enable Performance Management v12 Acceleration in Provisioning.

For more information, refer to Enabling Performance Management v12 Acceleration from Provisioning [page 63].</td></tr>
</table>

FAQ	Answers
If I like my old Performance Management V12 or V11 form as it is, should I upgrade immediately?	If your forms are supporting your process now, you can wait to upgrade until after your performance cycle is complete. However, the Official Retirement Date for Performance Management v11 and old Performance Management v12 is planned for the Q2 2019 Release. Starting Q3 2019, Performance Management v11 and old Performance Management v12 form launches will no longer be supported.
What if I don't like Performance Management V12 Acceleration? Can I turn it back off?	This is a one way upgrade, you will not be able to revert back to the old v12 or v11 versions. Please review all documentation carefully before upgrading.
Will I need a Professional Services Engagement to create new templates?	As we move into increased feature support for our Performance Management v12 Acceleration forms including many features and configuration options of Performance Management v11, which were not previously available in the Performance Management v12 UI, we have created a way for these features to be added seamlessly via the Validation and Approve tool that can be accessed via Manage templates. We recommend that you engage our Professional Services team or Partner Services when implementing any new business processes. If you are already using Performance Management, you can upgrade to the latest version without paying any additional license fee. You only have to pay in case you require consultancy and assistance to upgrade due to the complexity of your processes and configurations. If you are using standard configurations, we do provide a conversion tool to enable you to convert your templates for free. See, Validating and Updating Existing Performance Management Forms [page 33].
Can I use SuccessFactory with Performance Management V12 Acceleration Forms?	It is possible to use SuccessFactory with Performance Management V12 Acceleration form templates in a limited fashion. This should only be attempted by someone with experience. **Note** Every use case has not been tested, and there is limited support available. Over the next few releases, we plan to have more configuration capabilities directly in Manage Templates.

FAQ	Answers
Will my existing Performance Management V12 (non-Acceleration) templates stay exactly the same?	Your Performance Management v12 templates will not stay exactly the same. Very few things must change, but there are some. One is that Official Rating configurations will have to be converted to Rating Options + Field Permissions. Also, the "Rating of Record" field will now be visible in the form. You can also hide the field or permission it as desired.
Will my existing Performance Management v11 templates stay exactly the same?	Your Performance Management v11 templates will not stay exactly the same. The UI of your forms will be updated to the Performance Management v12 Acceleration UI, including side-by-side ratings as well as Pods at the top of the form.
Will in-process forms be affected?	All in-process and completed forms will look and behave the same way they did before the upgrade. This goes for Performance Management v11 and Performance Management v12 (non-Acceleration) forms.
When will Performance Management v11 and Performance Management V12 (non-Acceleration) be retired?	Official Retirement Date for Performance Management v11 and old Performance Management v12 is planned for the Q2 2019 Release. Starting Q3 2019, Performance Management v11 and old Performance Management v12 form launches will no longer be supported.

Verifying Settings in Provisioning Before the Upgrade

Before proceeding with the Performance Management v12 Acceleration upgrade, all the recommended settings in Provisioning should be enabled.

> **Remember**
>
> As a customer, you do not have access to Provisioning. To complete tasks in Provisioning, contact SAP Cloud Support.

Here's the list of all the settings in *Provisioning* > *[Company]* > *Company Settings* that you should verify before validating and updating existing Performance Management v11 and v12 forms to Performance Management v12 Acceleration:

- **Performance Appraisal Smart Form**: This option should be enabled for backward compatibility.
- **Plus UI** : This option should be enabled for backward compatibility.
- **version 10 UI**: Make sure this option is enabled for backward compatibility.
- **STOP! Version 12 UI framework (Revolution)**: Enable this option if it is not already enabled. If this option is disabled, it indicates that the customer first needs to upgrade to v12 UI. If this is the case, it should be handled using a new case by the Platform team.
  You should not proceed with the upgrade until the customer is on v12, as upgrading to v12 is going to impact other modules not just Performance Management.

- **version 11 UI framework (ULTRA)**: This option should be enabled for backward compatibility.
- **Rich text editor for PM and 360**: Enable this option as Performance Management v12 Acceleration does not support plain text.
- **Rich text editor gives confirmation cleanup on text pasted from MS-Word**: If enabled it improves user experience and reduces the chance of forms getting corrupted.
- **Performance Management v12 — requires “version 12 UI framework (Revolution)”** : This option should also be enabled for backward compatibility.
- **NextGen Admin Homepage (Admin v3.0) - requires "Version 12 UI framework (Revolution)"**: This option should be enabled for the customer to use the OneAdmin tool with the v12 Acceleration upgrade.
- **Disable Form Status Page**: Form Status is an old v 9 feature that existed before Dashboards were created. Dashboards have reports and pie charts that enable managers and users to track the forms in the workflow. In case this option is enabled, make sure you disable this option and provide detailed instructions to the customer on how to use the Dashboard.
- **PMv12 Acceleration - requires "Performance Appraisal Smart Form"** : Enable this option if this option is not already enabled.
- **Enable Transfer Inbox documents for C-Step users during Bulk User Import (Works only for E, EM, EX and EP Roles)**: The inbox documents do not get transferred for C-step users during bulk user import by default. This option needs to be enabled for the transfer to happen.
- **Disable Workflow Status and Score Distribution [via v9 reports button/v10 Analytics Tab -Classic Reporting (in v10 called "Aggregate & Individual Workflow Status"/"Ratings Distribution by Hierarchy")-** : Disable this option as this feature is Obsolete and should not be used.
- **Performance Management Access Permission — requires “version 11 UI framework (ULTRA)”** : This option should be enabled for the customer to have better access control to the module.

Also, some of the recommended options are listed below. In case these options are not enabled you should inform the customer about these options, and verify whether they have disabled them consciously.

- **Enable Archive & Print - requires Classic Reporting**
- **PM Ad Hoc reports available**
- **Performance Management**
- **Form Status**
- **Rating Scale**

Enabling Performance Management v12 Acceleration from Provisioning

The first step in configuring Performance Management v12 Acceleration is to enable the new interface in Provisioning.

Context

> Remember
>
> As a customer, you do not have access to Provisioning. To complete tasks in Provisioning, contact SAP Cloud Support.

Caution

Once Performance Management v12 Acceleration has been enabled, the operation cannot be undone except in a staging environment.

Procedure

1. Select the company, then select *Edit Company Settings* > *Company Settings*
2. Select *Performance Appraisal Smart Form* .
3. Farther down on the page, select *PM v12 Acceleration -- requires "Performance Appraisal Smart Form"*.
4. Also, make sure that *Stack Ranker for Performance Management* has been enabled, if necessary.

Validating and Updating Existing Performance Management Forms

As we move into increased feature support for our Performance Management v12 Acceleration forms including many features and configuration options of Performance Management v11, which were not previously available in the Performance Management v12 UI, we have created a way for these features to be added seamlessly via the Validation and Approve tool that can be accessed via Manage templates.

Context

You will have the ability to update your Performance Management v11 or Performance Management v12 template to a Performance Management v12 Acceleration template using our Validation Utility. After you have upgraded to PMv12 Acceleration you would then bring up your current Performance Management v11 or Performance Management v12 template through *Admin Center* > *Manage Templates*. You will see a new Validation Tool option that will allow the current template to be cloned and updated to be compatible with Performance Management v12 Acceleration.

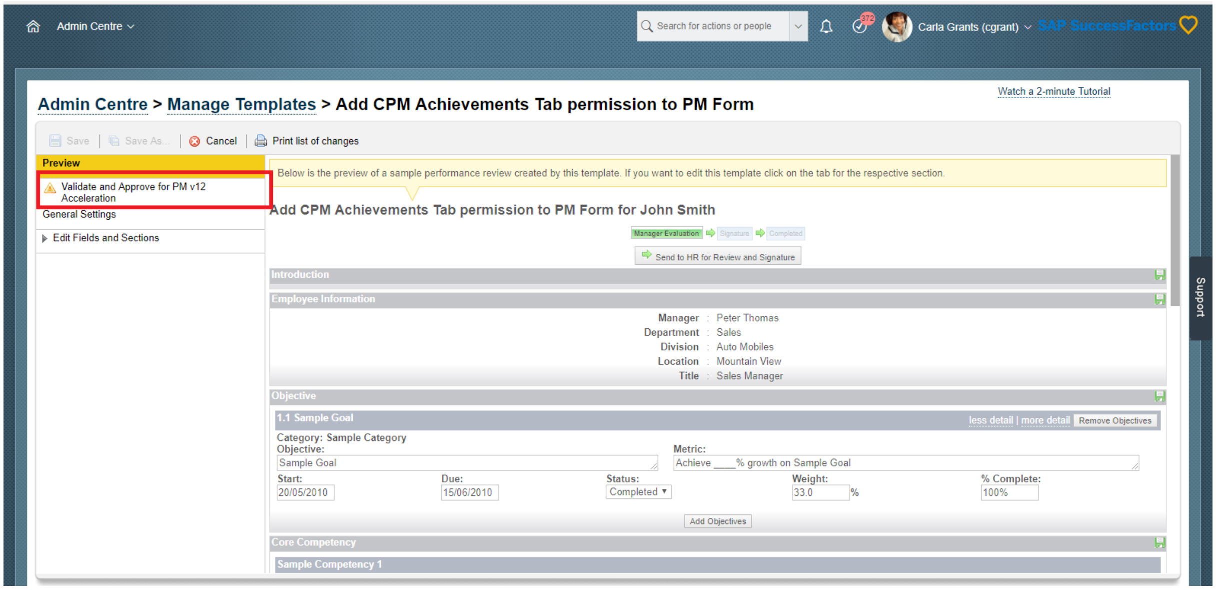
Note

You can also start the upgrade from the begining using our SuccessStore templates.

Procedure

1. Go to *Admin Center* > *Manage Templates*
2. Once in *Manage Templates*, select *Performance* and select the template you wish to update with the Acceleration features.

3. Once you have opened the template, on the left of the page click *Validate and Approve for PM v12 Acceleration*.



This tool will make a copy of your original template and configure it for compatibility with the Performance Management v12 Acceleration upgrades. The original template will be set to *Disabled* but will still be accessible from Manage Templates when the *Show Active Templates Only* filter is unchecked.

> **Note**
>
> If you still need to use the original template, or if the template is still in use, then do not convert it at this time, as a template set to disabled will impact functionality.

> **Tip**
>
> If you do need to finish a cycle with this older template, make a copy of it first (before you convert it), then leave the original template and cycle in place, and then proceed by converting the newer copy of the Performance Management v11 template. This would prevent impacts to the current cycle.

4. To review the compatibility changes needed, use the *General Settings* and *Edit Fields and Sections* tabs to the left of the page, to see a list for each section. You can also view all compatibility changes by clicking *Print list of changes*.
5. When you click *Update and Edit* most of the changes will be made automatically. Any changes that need further editing or review will be highlighted in the *General Settings* and *Edit Fields and Sections* tabs to the left.
6. When you are done with all editing, click *Approve for Launch* to make this template available for launch.

Results

Validation Messages: When you validate the old template you are going to see many validation messages. However, most of them are informational only.

For example, one of the first items is about your template version number. This message can be ignored and has no significance in the upgrade process.

You may also see many messages about "Obsolete Features" and "Obsolete tags". These too can be ignored.

A thorough testing must be performed to evaluate program behavior. Only a thorough testing can ensure that any obsolete features or changes you need to make do not negatively impact your next cycle.

Converting Official Rating Configurations in Performance Management v12 to Rating Options for Performance Management v12 Acceleration

If you are a Performance Management v12 customer, whose templates include configurations for any role other than the direct manager (EM) role to determine the official rating of record, you need to pay special attention to the Performance Management v12 Acceleration template validation process.

Basic Concepts

- **Official Rating Configurations**:
  Designation of a role other than the direct manager (EM) role as the “official rater” of a form in Performance Management v12 templates was configured using a permission called “official rating permission. This configuration is no longer supported in Performance Management v12 Acceleration.
- **Rating Options In Performance Management v12 Acceleration**: In Performance Management v12 Acceleration, the rating of record is stored in a separate data field from the rating that’s considered a user’s personal rating, and the configuration of who has influence over the final form rating is two-layered. These layers are the Rating Option chosen, with the addition of Field Permissions for some cases.
- **Rating Options**: There are 4 rating options supported in Performance Management v12 Acceleration, which determine the first level of configuration:
  - Rating Option 0: Everyone rates in the same data field, each overwriting the previous ratings.
  - Rating Option 1: Everyone but the form subject (employee) rates in the same data field, each overwriting the previous ratings. The form subject has a personal rating field, though it is most often displayed to other roles.
  - Rating Option 2: Everyone can rate in their own data field, and any roles who are to determine the final rating of record are granted access to the single rating of record data field.
  - Rating Option 3: Only the EM role and the form subject can rate the form. The EM role determines the rating of record.
- **Field Permissions**: With Rating Option 2, the configuration for which roles determine the rating of record is accomplished by putting permissions on the rating of record data field. Best practice is to hide the personal rating field and display the rating of record field for any role, which should have rating of record rights. It is possible to display both fields to these users, but can be confusing and is not considered best practice.

Configuring Rating Options in Performance Management v12 Acceleration

It can seem complex to convert Performance Management v12 Official Rating Configurations to Performance Management v12 Acceleration Rating Options, but the Validation tool in Manage Templates will do most of the work for you. Here's how to complete the conversion.

- **Record Current Rating Configurations**
  Before using the Validation Tool in Manage Templates, it's a good idea to record what your current rating configurations are. For all Performance Management v12 templates, there is a tab on the left-hand side of the interface, which reads "Analyze Configuration." That tab contains details of the current Performance Management v12 template configurations, including which roles have permission to influence the final rating of record.
  We suggest taking notes on which steps and roles have hidden or write permissions configured. Roles with write permission are official raters, and roles with hidden permission are not.

  > **Note**
  >
  > Sometimes a role may be granted write permission for official rating in one step, but not in another. It is possible to do this so the role can give a rating to affect the rating of record, but later can only see the rating of record, which may have been changed by another role.

- **Update and Edit the Form Template Using the Validation Tool**
  When you have noted the official rating configurations for the template, proceed to review all of the configuration changes that will be made by the validation tool and then click "Update and Edit" to copy the template to a new, Performance Management v12 Acceleration-compatible template. For information on how to use the "Validation tool", refer to Validating and Updating Existing Performance Management Forms [page 33].
- **Rating Options Baseline Set by the Validation Tool**
  Among other configurations that will be set automatically to preserve existing form behavior, the validation tool will set a baseline Rating Options configuration, which can then be further configured to match your previous settings.
  The baseline setting is:
  - Rating Option 2: Everyone can rate in his or her own data field, and any roles who are to determine the final rating of record are granted access to the single rating of record data field.
  - Field permissions are set to grant access to the rating of record data field to the direct manager (EM) role.
- **Adding Further Configuration to the Baseline Rating Configurations**
  From here, you may want to add access to the rating of record field for other roles (such as matrix manager or HR manager), revoke access for the direct manager (EM), or control access more granularly by route map step.
- **Approve Form Template for Launch**
  The final step in the Performance Management v12 Acceleration form template validation process is to approve the form for launch. However, this is not the final step before launching forms to live users.
- **Test All Forms Before Launching**
  We recommend enabling Performance Management v12 Acceleration in a test instance and thoroughly testing templates for expected behavior before upgrading on a production instance. In addition, in either instance it is always best to launch some test forms before launching forms to live users from the new, validated templates.

Retirement Date for Mass Create Form Instances and Manage Scheduled Mass Form Creation

The *Mass Create Form Instance* and *Schedule Mass Form Creation* tool will soon be deprecated.

Important Dates

- **End of Maintenance**: The date after which no further bug fixes or patches will be delivered for the feature or version. Customer support is limited to how-to help.
  Official '**End of Maintenance**' for *Mass Create Form Instances* and *Schedule Mass Form Creation* tool is planned for the **Q2 2018 Release**.
- **Retirement Date**: The date after which the feature or version is permanently disabled and no longer supported.
  Official '**Retirement Date**' for *Mass Create Form Instances* and *Schedule Mass Form Creation* tool is planned for the Q3 2018.

> **Note**
>
> All major features of *Mass Create Form Instances* and *Schedule Mass Form Creation* are available in *Launch Forms*.
>
> In Q3 2017, *Mass Create Form Instances* and *Schedule Mass Form Creation* will display a warning message instructing users to use *Launch Forms*. For more information on Launch Forms, refer Launching Forms [page 337]
>
> Additionally, in preparation for the end of life date, these two features can now be hidden from admin users via *Admin Center* > *Cross Talent Feature Settings* > *Disable mass create form instance and schedule mass form creation*.

1 Performance Management Product Types and Supported Feature/Option/Section

Performance Management has three different versions: Performance Management v11, Performance Management v12 and Performance Management v12 Acceleration.

In the table below you can review the features and configurations options of the different Performance Management versions to be aware of what is supported by each version.

Feature/Option/Section	PM v11	PM v12	PM v12 Acceleration
Sections			
User Information Section	X		X
Planned Learning Section	Obsolete	Obsolete	Obsolete
Learning Results Section	Obsolete	Obsolete	Obsolete
Objective/Competency Summary Section	X		X
Performance/Potential Section	X		X
ReviewInfo Section	X		X
Compensation Section	X		X
Job Description Section	X		X
Goal Section	X	X	X
Competency Section	X	X	X
Introduction Section	X	X	X
Development Section	X	X	X
Performance Summary Section	X	X	X
Custom Section	X	X	X
Signature Section	X	X	X
Attributes			
EZ-Rater	X		X
EZ-Rater Expand All	X		Under Consideration
Hide Writing Assistant	X		X
Include/Exclude Section in Obj/Comp Summary	X		X
Include/Exclude Section in Overall Rating (Performance Summary)	X		X

Feature/Option/Section	PM v11	PM v12	PM v12 Acceleration
Include Section in Performance Summary Display	X	Always	X
Lock Item Weights	X	X	X
Lock Section Weights	X		X
Management-only	Obsolete	Obsolete	Obsolete, replaced with Rating Options
No-Group	X		X
No-Rate	X		X
No-Weight	X	X	X
Rating Options	X		X
Official Rating		X	Obsolete
Show/Hide Calculated Section Rating	X	Always	X
Show Expected Competency Rating	X		X
Split Comments (Side by Side)	X	Always	Always
Summary Comment Only	Obsolete	Obsolete	Obsolete, replaced with Field Permissions
Suppress Competency Comments (or choose competency v. behavior comments	X		X
Use Behaviors	X		X
Use Subtopic	Obsolete	Obsolete	Obsolete, replaced with Use Behaviors
Allow Draft Goals (BOM)	Obsolete	Obsolete	Obsolete, Goals must be in Goal plan
Ask for Comment	Obsolete	Obsolete	X
Hide Add Goal Button	X	X	X
Edit Goal Format	X	Always Pop-up	Always Pop-up
Use Milestones	X		Determined by Goal Plan Configuration
Use MLT Rating if Present	Always	X	X
Suppress Goal Comments	X		Obsolete, replaced with Field Permissions
Set maximum and minimum Goals in section	X		X
Set maximum and minimum Competencies in section	X	X	X
Show Group Matrix	X		X

Feature/Option/Section	PM v11	PM v12	PM v12 Acceleration
Elements Supported			
Button-permissions	X	X	X
Official-rating-permission		X	Obsolete
Sect-weight	X	X	X
Sect-level-elements		Obsolete	Obsolete
Allow-to-add-development-goal	X		X
Editable-in-signature-step	X		
Meta-grp	X		X
Meta-grp-label	X		X
Content-filters	X		X
Fm-rating-info-config	X		Obsolete, replaced with Custom Elements
Fm-comp-filter-mapping	X		X
Others-rating-permission			X
Show-cdp-wizard-button	X		X
Section-color	X		Roadmap Consideration
Weight-total	X		X
Rating-bar-color	X		Roadmap Consideration
Hide-weight-percentage-sign	X		TBD, likely obsolete
Section-rating-calc	X		TBD, likely
Section-item-rating-calc	X		X
Add-modifier Button Permission	X		X (link, not button)
Add-signer Button Permission	X		X (link, not button)
Send Button Permission	X	X	X
Owner-role Field Permission	Section comments only	X	Section comments only today Additional: Roadmap Consideration
Set Custom Fields as Required	X	X	X
Set Matrix Ratings as Required	X		X
Tgm-field-permission	X		X
Rating-scale-label-link Field Permission	X		X
Inner-step-send Send Action	X		X
Adjusted Objective Rating			Not Supported

Feature/Option/Section	PM v11	PM v12	PM v12 Acceleration
Adjusted Competency Rating			Not Supported
Feature			
Hide Section Header (Combine Display of Multiple Sections, for example, Section Merge)	X		Planned
Comments with more than 4k Characters	X		X
Support for RTE Tags in Intros	X		X
Support for RTE Tags in Competencies	X	X	X
Access to past PM & 360 Forms	X		X
Choice of Sections to Print	X		X
Custom Elements in Development Section	X		X
Control of Goal Plan Fields Shown	X		X
Ask for Feedback		X	X
Get Feedback	X		X
Custom Print Layout Option	X		Planned
Table of Contents on Form	X		Planned
Team Overview		X	X
Incomplete Items Pod		X	X
Overall Score Pod		X	X
Gap Analysis Pod		X	X
Supporting Pod		X	X
Team Rank Pod		X	X
Team Rater	X	X	X
Ignore a section in score calculation if no ratings or no items.	X		X
Offline Performance Review	X		Not currently planned
Admin Tools			
Modify Form Route Map	X	X	X
Delete Documents	X	X	X
Restore Deleted Documents	X	X	X
Approve Document	X	X	X
Sign Document	X	X	X
Route Document	X	X	X

Feature/Option/Section	PM v11	PM v12	PM v12 Acceleration
Route Signature Stage Document	X		X
Route Completed Documents	X		X
Import Overall Scores	X	X	X
Manage Form Objective Plan Data Association	X		X
Manage Document Visibility	X		X
Change Document Date	X	X	X
Launch Form	X	X	X
Mass Create Form Instance	Will be deprecated in Q2 2018 Release and will no longer be supported.	Will be deprecated in Q2 2018 Release and will no longer be supported	Will be deprecated in Q2 2018 Release and will no longer be supported.
Manage Scheduled Mass Documents Creation	Will be deprecated in Q2 2018 Release and will no longer be supported.	Will be deprecated in Q2 2018 Release and will no longer be supported.	Will be deprecated in Q2 2018 Release and will no longer be supported.

New in Performance Management v12 Acceleration

Features included in Performance Management v12 Acceleration are:

Description	Comments
Support for *if no rating ignore section*	Configured via XML in the Competency section.
Add Modifier and Add Signer	Configured in the XML template only
EZ Rater	Configure in XML template only, in the Competency section using the fm-sect-config ez rater
Expected rating display for item level competencies and behaviors, along with the expected rating display for competencies and behaviors in the summary section.	Configured via XML in the template only
Hide form route map entirely on the form	Configured by an Administrator *Admin Center > Manage Templates >* then enablr *Hide Route Map on the Form* Form Template Settings [page 113] of via *General Settings > Advanced Options* on the form

Description	Comments
Explanatory text with the Validation Tool	In the *Admin Center > Manage Templates,* we now provide detailed and sequential instructions on how to validate a Performance Management v11 form when making it Performance Management v12 Acceleration-compatible.
Editing the message key ID via Manage Templates.	Edit in *Manage Templates* Editing the Message Key ID [page 112]
Visible item tabs	Increases visibility of information at the item level to end user without need to click-to-expose
Character limit bar for comments - character limit for required fields User warned when maximum character limit exceeded	End users are notified in real time when they have exceeded character limits that are configured in the fm-meta section of the XML template <meta-enforce- rte -limit>true</meta-enforce- rte -limit> Configuring Character Count Limitations [page 215]
Configuration of plain text instead of rich text	Form Template Settings or Advanced General Settings
The Cron scheduler has been replaced by a quartz scheduler for mass form creation	Increases job scheduling flexibility
Convert Cron jobs to quartz jobs runDueDateActio	Contact SuccessFactors Cloud Product Support to opt in to this feature.
Hiding Forms after Document Transfer	Form Template Settings
Route Signature Document and Route Completed Document	
Exclude a private goal from a goal section of a Performance Management form	
Different languages for behaviors displayed in ad hoc reports	

Note

Performance Management v12 Acceleration-compatible templates are available on the *SuccessStore*.

2 Introduction: Performance Management v12 Acceleration

SAP SuccessFactors Performance Management v12 Acceleration is part of the SAP SuccessFactors Performance and Goals bundle of applications.

Performance Management

Performance management is a process by which managers and employees work together to plan, monitor and review an employee's work objectives. It is about aligning the objectives of the organization with the employees' agreed measures, skills, competency requirements, development plans and the delivery of results through the automation of talent management processes.

Basic Principles of a Performance Form

Managers and employees use the performance review form to evaluate the employee's effectiveness in achieving goals, core values, and job specific competencies. You can configure the form to automatically display goals from goal plan. You can also choose whether to link the form to a goal plan.

Unlike a Goal Plan, a Performance Management form can be routed from one user to another. Performance forms include signature and competency sections, and are associated with route maps. Performance forms can be permissioned section by section and, in some case, field by field according to employee roles. Some types of Performance Management form sections appear only once in a form template, whereas other types appear multiple times.

> **Note**
>
> Even though the terms "forms" and "templates" are often used interchangeably, it is important to remember this distinction. You create specific forms on the basis of generic templates.

Performance Management v12 Acceleration Features

Performance Management v12 Acceleration is the latest version of the Performance Management product that will continue to be developed with new features and enhancements. While Performance Management v11 was built to support all process from best practice point of viewPerformance Management v12 is designed to improve the user experience of the manager.

- Performance Management v12 Acceleration is designed to optimize the user experience of the Managers. With the Get Feedback feature, Managers can ask any employee for insight about anyone on the team, right in the middle of the review. Managers can use the additional feedback to provide well-rounded comments to their team.

- The Review forms in Performance Management v12 Acceleration are optimized to provide the information that Managers need to give thoughtful feedback. Now, Managers can provide individual feedback while working in context of their entire team because we know giving individual feedback is only one part of the performance process. Managers can review feedback of other employees in the organization, stack-rank their team, and rate in context of the employee's self-rating, all with tools that are never more than a page away from the form they're currently working on.

3 Usage of HTML or custom code within the SAP SuccessFactors Application

Adding custom code, java script, CSS & HTML within the SAP SuccessFactors Application is not supported by our system.

Consider the following before you add any Custom Code, Java Script, CSS & HTML in SAP SuccessFactors Application:

- We do not test the impacts of any custom code. It is unrealistic to account for the unlimited possibilities that using HTML or any other code might present to the end user's browser.
- The code could be exported anywhere within a non-HTML-rendering environment, but HTML would never work in Ad Hoc reporting, analytics exports Detailed Document Search, or a Competency Library export, as there is no HTML parsing involved.
- You should start with the presumption that HTML is not supported anywhere in the product, but you are free to test any customizations including basic HTML formatting such as bolding, coloring and basic text formatting, anchor hyperlinks, and so on., to determine if these will function sufficiently for your purposes.
- Some areas of the product will actively sanitize or strip out certain code, including java script, which will effectively cause it to break, give errors, or not function at all. This is for security reasons to prevent malicious code, or code that can negatively impact performance, from accidentally or purposely being inserted into the SAP SuccessFactors Application.
- Also, special formatting from programs such as microsoft word actually use custom HTML coding when cut and pasted into our application, so pasting content into your forms, competencies, goal plans, can cause unexpected operation and issues.

> **Caution**
>
> We do allow you to add custom code and HTML into the system at your own risk, understanding that you are fully responsible for testing and validating that there are no unexpected results throughout all areas that the code might impact. Also, understanding that SAP SuccessFactors makes no representation to support this code, or commitments to change our product in any way to support the expected functionality you require.
>
> However, you may find that custom code and HTML may function for a time and then break or stop working as expected without warning due to our regular product releases or updates. SAP SuccessFactors may release new updates to the product that negatively impact your custom code, as again we are not responsible for performing any tests on your code. We also make no commitments to update the product to support the previously working HTML as we do not consider these impacts as a product bug.
>
> There may be exceptions where we do feel we can make a change to support the custom code and may release a patch to restore functionality, but this decision is made by the Product Manager for each module after a risk analysis is performed.

For more information on supported HTML formating, refer to Supported HTML for Performance Management v12 Acceleration Forms [page 47]

3.1 Supported HTML for Performance Management v12 Acceleration Forms

You need to use correct HTML formatting while editing a Performance Management v12 Acceleration form. You can edit a form using dedicated form elements and attributes.

While editing a Performance Management v12 Acceleration form, you might come across the following error message: *The only tags supported are [p, a, strong, em, u, ol, ul, li, font, img, blockquote]*.

Examples of proper formatting of HTML for Performance Management v12 Acceleration forms.

```
 <p>This is an example of <strong>bold text</strong></p>
 <p>This is an example of italicized text</p>
 <p>This is an example of <u>underlined text</u></p>
 <p><ol><li>This is an example of a numbered list</li></ol></p>
 <p><ul><li>This is an example of a bulleted list</li></ul></p>
 <blockquote cite="http://www.successfactors.com">
   <p>This is an example of indented text</p>
 </blockquote>
 <p>This is an example of a <a href="http://
www.successfactors.com">hyperlink</a></p>
 <p>This is an example of a <a href="http://www.successfactors.com"
target="_blank">hyperlink</a> that opens in a new window</p>
 <p>This is an example of <font color="#0000ff">colored text</font></p>
 <p>This is an example of <font size="4">larger text</font></p>
 <p>This is an example of an embedded image<img alt=""
 src="http://www.successfactors.com/etc/designs/successfactors/images/
logo_successfactors.png"
 style="width: 216px; height: 42px;" /></p>
```

4 Key Concepts in Templates

Form templates are the basis for all forms in SuccessFactors.

The form that each user receives contains all the elements of the form template on which it is based.

Key Concepts

<table>
<tr><th>Concept</th><th>Explanation</th></tr>
<tr><td>Forms</td><td>Forms are used to record information such as the evaluation of an employee's performance during a review cycle. Forms are generated from templates.</td></tr>
<tr><td>Templates</td><td>Templates contain the layout, sections, and workflow for each form. Predefined templates based on best practices are available in the Success Store (Manage Templates).</td></tr>
<tr><td>Competencies</td><td>Competencies are the basic abilities required by an employee to perform his or her role within the organization successfully. You can think of competencies as defining behaviors; most performance is not about what an employee knows, but about how he or she acts.</td></tr>
<tr><td>Launch forms now

Launch forms later</td><td>These are both methods of launching a form. The method you use depends on your company policy.
<table>
<tr><th>If your review process is based on</th><th>Use this method</th></tr>
<tr><td>The employee hire date</td><td>Schedule mass-creation</td></tr>
<tr><td>A specific date for all employees regardless of their hire date</td><td>Mass creation</td></tr>
</table>
When you mass-create a form, you launch forms only once for all users regardless of their hire date. For example, if you mass-create a 2014 Performance Review, the form is sent once, on the date you specify, to the group of employees you specify.

When you schedule mass form creation, you create a launch that will occur on a regular schedule based on employees hire dates. For example, if you schedule an anniversary review with the frequency of 12 months, the review form will be automatically sent every 12 months on the anniversary of the employee's hire.</td></tr>
</table>

Concept	Explanation
Route Map	Route Maps establish the workflow and steps that employees follow during the performance review process. A Route Map defines the: • Users involved in the review process • Order in which the users will receive the form, The xml of the form defines the actions that a user can take based on the route map steps. For example, the Route Map for a performance review can specify that the employees provide comments and goal ratings and send the form to their manager. Then, managers provide their comments and ratings and return the form to the employee. Finally, both employee and managers sign the form. Each form template must have one, and only one, Route Map associated with it. A Route Map contains three stages: • Modify stage • Signature stage • Completion
Rating Scale	A rating scale is required when creating a form template. SuccessFactors recommends using a five-point scale, which has a midpoint that permits differentiation without introducing scores that are too close to be of much value. In the default setting, 1 is the lowest rating and 5 is the highest rating. The rating scale can be reversed if necessary. This change requires the assistance of SuccessFactors consultant. **Note** In Performance Management v11, ratings can be displayed side-by-side or stacked. In Performance Management v12, ratings will always be displayed side-by-side, and can be displayed on the form as stars, circles, or as a dropdown menu.
Stack Ranker	If enabled on the Performance Management form, it allows managers to edit competency ratings and comments and view overall scores for their team in one place.
Roles	Performance Management forms and routing maps only use supported relationship roles at this time. RBP roles do not apply to form permissions or routing maps.

4.1 About Permissions

You allow users or roles to view or modify various sections or fields in a Performance Management template by granting or denying permissions. Performance Management v12 Acceleration automatically grants all permissions to all users when no specific permissions have been configured.

The basic types of permissions that you can configure in Performance Management v12 Acceleration are:

- Section
- Button
- Action
- Field

Permission	Type	Set Permission On
Section	• Enabled • Hidden • Disabled	• Roles • Route Steps
Field	• None • Read • Write	Field • Section Comments • Manual Overall Rating • Calculated Overall Rating • Weighted Average
Action	• Enabled • None	Actions • Roles • Route Steps
Button	• Enabled • None	Button name: • Reject • Finalize Form • Sign • Overall Score • Gap Analysis • Incomplete Items • Team Ranker • Supporting Information • Send to Previous Step • Delete Form • Get Comments • Get Edits

Recommendations

Configure field and other permissions by taking away **all** permissions for **all** users in **all** steps and then explicitly adding the desired permissions back into the configuration.

If you want to grant permissions to some, but not all users, first define a *None* permission for all users in all route map steps, and then grant permissions on top of the blanket *None*.

If you want to permit access to a field when the form is completed, set *Read* permission for all user roles and then either grant *Write* permission or hide fields in particular steps.

Button Prioritization

To optimize user experience, the Performance Management form allows only a maximum of five buttons to appear at the bottom of the form. Two of the five buttons, *Save and Close*, and *Cancel*, are permanent buttons.

Additional buttons are prioritized as follows:

1. Finalize Form / Sign / Confirm 1:1 (only one of these 3 can exist –these 3 cannot co-exist)
2. Reject
3. Send to Person (1 or more in an I step.)
4. Get Feedback/Recall Feedback
5. Send to Previous Step
6. Add Modifier
7. Add Signer

Example

If a user includes *Finalize Form, Get Feedback*, and *Add Signer*, all three receive its own button. If the form is configured to include *Add Modifier* then based on the prioritization, *Add Signer* and *Add Modifier* would be included under the *More Actions* button as options from the pull down menu. This would create a total of 5 buttons in the form footer.

4.1.1 Roles

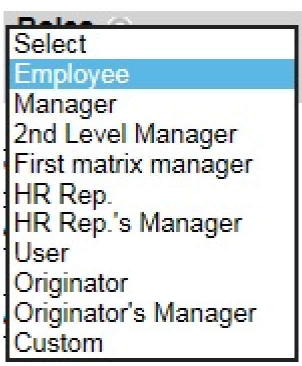
These roles can be used to define permissions:

Role ID	Role Name	Description
E	Employee/owner	
EH	Employee's HR representative	The human resources representative is designated in the employee data file in the HR column. This role has reporting privileges and can be used to limit the scope of reporting privileges to allow the user

Role ID	Role Name	Description
		to exercise a specific privilege only in relation to those employees for which the user is designated as the HR representative. This role can be used to set permissions in objective plans and Live Profile. It can also be used for form routing.
EM	Manager of the employee	The manager role is the basis for the employee hierarchy. This role is used for form routing and permissions anywhere a manager touches or views employee processes and documents. The hierarchical relationship is the basis for many reporting capabilities.
EX	The primary matrix manager of an employee	Matrix manager is used to define a "dotted-line" manager relationship. This role can be displayed in the organization chart. It has a pre-defined set of reporting permissions and in addition can be used to define specific reporting permissions. Matrix Manager can also be used is many other situations where a user needs visibility into an employee's goal plan, development plan, performance documents, assessments, profile information, succession planning. It is often used to define the members of a succession planning team. You can use the EP role in form routing will route a

Role ID	Role Name	Description
		document to all Matrix Managers in sequence.
EA	The second level manager of an employee	This role is designed for Compensation processes where the compensation hierarchy and workflow may be different from the organization hierarchy. It can also be used in form routing and permissions in the same manner as the EM role in Performance Management, where it is not needed for Compensation.
U	Specific Person	Used in form routing, where a form is to be routed to a specific person rather than by role.
O	Originator	The user who created a form.

When you configure a route map via the Admin tools, you select a role from a list box as shown here:



4.2 Performance Review Form Settings and Fields

All performance review forms contain the following required components.

- Form title: descriptive of the form. The title is visible in the Inbox and on the open form. It is a combination of Form Template Name and User Full Name
- Form workflow: controlled by the route map, the workflow controls how the form moves throughout the review process.

- Form content: sections that provide additional information to the reviews, display information from other areas of the software such as goals, and let the reviewer rate and comment on goals and/or competencies.

Regardless of whether you add a new template from the *SuccessStore*, or modify an existing template, you need to define the general settings and then edit the fields and sections.

The *General Settings* page is where you define the basic fields of your template such as name and description. This is where you define the rating scale. When you add a route map, you also indicate how the form will be routed when it is launched.

Under *Edit Fields and Sections* you define more detailed settings for your form templates.

Form Section	Comments
Meta	Allows you to set some overall parameters for the summary section.
Employee Information	Displays basic employee data for the individual you are reviewing, the subject of the form. You can rename the section and include or exclude various fields to show more or less information about the employee. This information in this section is non-editable and read-only.
Review	Displays the review period that the form covers and the person who created the form
Introduction	May contain text-based content to provide information to your users. This information may be about the purpose of the review, whom to call for assistance, or any other information that you feel is relevant to the review.
Job description	
Section weights	Each of the Goals and Competencies sections on the form must have a weight. This weight is used in the overall performance form score calculation. For example, you may set the weight of the Goals section as 30% and the weight of the Competencies section as 70%, or you may set these sections as 50/50. The calculated overall rating takes this into consideration.
Goals	On a performance form: • Performance Goals can be automatically populated into the form from the goal plan of the employee, or added manually. • Development Goals can be added to assist in planning for the upcoming year.
Competencies	The basic abilities needed by employees to perform their role within the organization successfully. Including core competencies in the review reinforces their importance to all employees and signals what is expected of them. Competencies can be automatically populated into the form or added manually.
Summary	Displays summarized information from the goal and/or competency sections on the form in one central area. The amount of summarized information is determined by the content in the working sections of the form. For example, if your form includes ratings and weights, the average score from these values is shown for each section, as well as a general overall performance score. You can also set the weights for each section here.
Custom	Can be used in a form use to display or capture information that is not objective or competency-based.
Objective/Competency	Calculates two scores: an Objectives score and a Competencies score. These two scores are then plotted to determine the quadrant in which an employee fall on the obj-comp chart. These two scores are completely independent of each other
Performance/Potential	Supports two overall scores: an overall Performance score and an overall Potential score. These two scores can then be plotted to determine the quadrant in which an employee fall on the performance-potential chart. These two scores are completely independent of each other.

Form Section	Comments
Signature	Displays the names of the people who will sign the form and, once signed, displays the signature of the signer and the date signed.

4.3 About Weights

Use section weights to impose a relative importance or priority on performance factors in calculating and overall rating/score.

Bear in mind that:

- Section weights are optional in a form
- Weights can be enabled for all sections in a form (section weights) or enabled just for objectives/competencies (performance factors) within a section (item weights)
- Item weights are more commonly used for objectives; competencies are generally treated with equal importance; however both sections may be weighted to calculate the overall form score
- If no weights are specified in a form, all performance factors are implicitly weighted equally
- Typically if you are using weights in a form, you are also calculating an overall score for example, if you want to derive a numerical rating for input into a compensation module. Otherwise if you want to express ratings as a textual description weights may not be necessary
- Weights can be expressed as a number or percentage
- Weights can be configured to be editable in a form or can be displayed as read-only
- Set a section weight to 0.0 if you do not want to include the section in the overall calculated score
- Role-based competencies and behaviors can also be assigned specific weights.
- A section can be configured so a warning appears if weights do not add up to a specified weight total. Weights do not need to add to 100%; calculation will be based on percentage of sum total.

5 Role Base Permissions

Role-based Permission (RBP) allows customers to have as many roles in the SAP SuccessFactors system as necessary. Role-based permission also provide the ability to grant each role a different level of permission granularity.

RBP Concepts

You can define many roles. The roles define access to data and functionality. Roles are granted to groups of users (granted users). Granted users may perform the roles on target users. Groups can be dynamic to automate assignment of permissions.

5.1 Enabling Role Based Permissions

Before Role Based Permissions can be enabled, they must be enabled in Provisioning.

Context

> **Remember**
>
> As a customer, you do not have access to Provisioning. To complete tasks in Provisioning, contact SAP Cloud Support.

There are several steps involved in enabling Role Based Permissions:

Procedure

1. Log in to Provisioning, and navigate to your company, and then select *Company Settings*.
2. Select the checkbox next to *Role Based Permissions*.
3. Scroll up to save changes by clicking *Save Feature*.

5.2 Granting Admin Permission to Manage Role Based Permissions

The Role Based Permissions framework not only allows control of permissions granted to a user, but also allows the administrator to restrict the scope of employees managed.

Context

Procedure

1. Log in to the Instance and navigate to *Admin Center*.
2. Navigate to *Admin Center* > *Manage Employees* > *Set User Permissions* > *Manage Role Based Permission Access*.
3. Click *Add User*, search for and select the admin user.
4. Check the box next to the admin username and click *Grant Permission*.
5. You must logout for the changes to take effect, and there may be some lag time before the changes are made.

5.3 Role-Based Permissions for Performance Management

When you set up Performance Management v12 Acceleration, it is very important to identify the user groups you want to provide access to, and then accordingly enable the required role-based permissions for each group.

To access the Role Based Permissions, go to *Admin Center* > *Manage Permission Roles* > *[Permission Role]* > *Permissions* and then choose the appropriate role based permissions from the *Permission settings* dialog box.

Here's the list of all the Performance Management v12 Acceleration features with their corresponding role based permissions:

Manage Form Templates [page 58]
To work with Form Templates, Rating Scales and Route maps, you must first enable role based permissions.

Manage Forms [page 59]
To work with Performance Management form after it is launched, you must first enable role based permissions.

Route Forms [page 60]
To Route Forms in Performance Management, you must first enable role based permissions.

Notes Block [page 61]
To work with Notes Block feature in Performance Management, you must first enable role based permissions.

5.3.1 Manage Form Templates

To work with Form Templates, Rating Scales and Route maps, you must first enable role based permissions.

Permissions for Form Templates are enabled using *Admin Center* > *Manage Permission Roles* > *[Permission Role]* > *Permissions* > *Permission settings* > *Administrator Permission* > *Manage Form Templates* page.

To...	Enable this permission...	These permissions apply to...	For more information, see...
Create, edit, enable or disable Performance Management form templates	*Form Templates*	Admin	Form Template Settings
Create and edit the *Show Advance Option* section of Manage Templates in Performance Management v12 Acceleration	*Comprehensive template configuration for PMv12*	Admin	General Settings - Advanced Options
Launch forms in bulk immediately	*Mass Create Form Instances (Launch forms now)*	Admin	Launching Forms
Schedule mass creation of forms at a later time and date	*Schedule Mass Form Creation (Launch forms later)*	Admin	Launching Forms
Create Rating Scale and modify existing Rating Scales.	*Rating Scales*	Admin	Rating Scales
Create Route Maps and modifying existing Route Maps.	*Routing Maps*	Admin	Route Maps
Export Performance Management form data through API	*Export Performance Management Form Data*	Admin	

Parent topic: Role-Based Permissions for Performance Management [page 57]

Related Information

Manage Forms [page 59]
Route Forms [page 60]
Notes Block [page 61]

5.3.2 Manage Forms

To work with Performance Management form after it is launched, you must first enable role based permissions.

Permissions for Form Templates are enabled using *Admin Center* > *Manage Permission Roles* > *[Permission Role]* > *Permissions* > *Permission settings* > *Administrator Permission* > *Manage Documents* page.

To...	Enable this permission...	These permissions apply to...	For more information, see...
Access the Admin tools to complete the current step of a form in the Modify stage and move the form to the next step	*Approve Document*	Admin	Route Forms
Access the Admin tools to change the form start date, end date and due date on an in-progress form	*Change Document Date*	Admin	Change Form Date
Access Performance Management via the Web client **Note** The permission for Admin access to Forms OData API must be enabled for both employee and manager roles to ensure that the Edit and Delete buttons are available while using Continuous Performance Management via the Web client.	*Admin Access to Forms OData API*	Admin, Employee and Manager	Performance Management Form Entities

To...	Enable this permission...	These permissions apply to...	For more information, see...
Access the Admin tools to Delete forms from the system	*Delete Documents*	Admin	Deleting a Form
Access the Admin tools to update manual overall scores on the forms through an import	*Import Overall Scores*	Admin	
Remove or restoring document visibility to the users	*Manage Document Visibility*	Admin	Managing Document Visibility
Restore documents that was previously deleted	*Restore Deleted Documents*	Admin	Restoring a Deleted Form

Parent topic: Role-Based Permissions for Performance Management [page 57]

Related Information

Manage Form Templates [page 58]
Route Forms [page 60]
Notes Block [page 61]

5.3.3 Route Forms

To Route Forms in Performance Management, you must first enable role based permissions.

Permissions for Form Templates are enabled using *Admin Center* > *Manage Permission Roles* > *[Permission Role]* > *Permissions* > *Permission settings* > *Administrator Permission* > *Manage Documents* page.

To...	Enable this permission...	These permissions apply to...
Create and distributing multiple instances of the same form at once and to route the form forward in the workflow	*Mass Route Document Forward*	Admin
Create and distributing multiple instances of the same form at once and to route the form backward in the workflow	*Mass Route Document Backward*	Admin
Add, re-order or remove routing steps of the workflow of a form	*Modify Form Route Map*	Admin, Employee and Manager

To...	Enable this permission...	These permissions apply to...
Route a completed form back to another stage	*Route Completed Documents*	Admin
Move a form in the Modify stage of any step in any stage *Administrator Permission* > *Manage Documents*	*Route Document*	Admin
Access the Admin tools to route completed forms	*Include Completed Documents*	
Access the Admin tools to add a step in the route map	*Route Document* > *Allow Adding of a Step*	
Route a form from the Signature stage back to the Modify stage	*Route Signature Stage Document*	Admin
Sign a form in the Signature stage and moving the form to the next person who will sign the form	*Sign Document*	Admin

Parent topic: Role-Based Permissions for Performance Management [page 57]

Related Information

Manage Form Templates [page 58]
Manage Forms [page 59]
Notes Block [page 61]

5.3.4 Notes Block

To work with Notes Block feature in Performance Management, you must first enable role based permissions.

Permissions for Form Templates are enabled using *Admin Center* > *Manage Permission Roles* > *[Permission Role]* > *Permissions* > *Permission settings* > *User Permission* page.

To...	Enable this permission...	These permissions apply to...	
Create Notes	*General User Permission* > *Permission to Create Notes*	Manager, Employee	Using the Notes Block Feature in Performance Management v12 Acceleration
View Notes	*Employee Views* > *Notes*	Manager, Employee	Using the Notes Block Feature in Performance Management v12 Acceleration

Parent topic: Role-Based Permissions for Performance Management [page 57]

Related Information

Manage Form Templates [page 58]
Manage Forms [page 59]
Route Forms [page 60]

6 Enabling Performance Management v12 Acceleration from Provisioning

The first step in configuring Performance Management v12 Acceleration is to enable the new interface in Provisioning.

Context

Remember

As a customer, you do not have access to Provisioning. To complete tasks in Provisioning, contact SAP Cloud Support.

Caution

Once Performance Management v12 Acceleration has been enabled, the operation cannot be undone except in a staging environment.

Procedure

1. Select the company, then select *Edit Company Settings* > *Company Settings*
2. Select *Performance Appraisal Smart Form* .
3. Farther down on the page, select *PM v12 Acceleration -- requires "Performance Appraisal Smart Form"*.
4. Also, make sure that *Stack Ranker for Performance Management* has been enabled, if necessary.

7 Implementation Sequence

After you have enabled *Performance Management V12 Acceleration* for your instance, you can create content, configure settings and form templates and launch forms by using the features listed under *Performance Management* in the *Admin Center*.

Note

If you are already using Performance Management, after enabling the *Performance Management V12 Acceleration* for your instance, you can validate your existing templates for compatibility with Performance Management V12 Acceleration. SeeValidating and Updating Existing Performance Management Forms [page 33].

The workflow for leveraging the Performance Management V12 Acceleration Form can be broadly described as a four-step process.

1. Setting up the system for Performance Management v12 Acceleration
2. Creating and configuring Performance Management v12 Acceleration forms
3. Launching the forms
4. Managing the forms after it is launched

Refer the tables for more information on the above sequence of steps:

Setting Up the System for Performance Management v12 Acceleration

Use this feature:	To do this:
Manage Competencies	Create, edit, download or delete competencies within a competency library structure.
Legal Scan Library	Add to and modify the legal scan library.
Legal Scan Library Import	Import a legal scan library to the system.
Company Dictionary	Modify the dictionary used for the spell checker on a form.
Rating Scales	Create, copy, or modify a rating scale.
Route maps	Create a Route Map and define the participants in a process and the order in which these participants will receive the form.

Configuring Performance Management Forms

The first step in configuring Performance Management v12 Acceleration is to enable PMv12 Acceleration the new interface in Provisioning.

Remember

As a customer, you do not have access to Provisioning. To complete tasks in Provisioning, contact SAP Cloud Support.

Use this feature:	To do this:
Performance Management Feature Settings	Enable "Performance Management Feature Settings" permission for the selected role
Creating and Manage Templates	Modify the settings or configuration of form templates. You can also access the Success Store to download new form templates.
Form Template Settings	Modify settings, upload or download a form template.
Configure Change Engine	Define the rules to handle document changes and document transfers, when the employee data changes.
E-Mail Notification Templates Settings	Edit the email notification settings to enable, disable, or configure the content of email templates. **Note** The following options are no longer available: • Feedback Request Reminder Notification • Performance Review Process Update for Manager

Launching Performance Management Forms

Use this feature:	To do this:
Launch Forms	Schedule and launch forms for a given process.

Managing Performance Management Forms

Use this feature:	To do this:
Manage Scheduled Reviews	Cancel or modify the launch of a form.
Change Form Date	Change the start, end, or due dates of a document.
Modify Form Route Map	Search for and modify a route map.
Route Form	Transfer the form from one participant to another, involved in the review process.
Approve Form	Validate or approve the form.
Sign Form	You can set a required field for Section Comments in the Signature Section, which means that an employee is required to enter a comment before signing the form.
Route Completed Forms	You can transfer completed forms

Use this feature:	To do this:
Manage Document Visibility	From the Manage Document Visibility page do one of the following: • Remove document visibility from a selected user or remove visibility of a specific document. • Restore visibility of a specific document to a selected user.
Transfer Forms to New Manager	The Documents Manager tool enables you to manually transfer in-progress, en-route and completed forms to the new manager, after an employee's manager changes.
Delete Form	Delete a form if it is not in use.
Restore Deleted Forms	Search for and restore a form that has been deleted.

You can also create content, configure settings and form templates and launch forms by using the features listed under *360 Reviews* in the *Admin Center*.

Use this feature:	To do this:
Change 360 Process Owner	Change the process owner of a 360 document.
Change Participant Category	Change the participant categories for a 360 document.
Complete/Decline 360	Complete or decline a 360 document
Change 360 Process Owner Form	Create 360 Review forms for a user or selected users.
E-Mail Notification Template Settings	Edit the email notification settings to enable, disable, or configure the content of email templates
Form Template Settings	Modify settings, upload or download a form template.
Launch 360 Reviews	Create and launch the form for a 360 Review process
Manage Route Maps	Define the recipients of a route map and the order in which he or she receives the map.
Manage Scheduled Reviews	Cancel or modify the launch of a form
Manage Templates	Create and update a form template
Rating Scales	Create, copy, or modify a rating scale
Restore Completed 360	Restore a completed 360 back to evaluation for a participant

You can get more information on the above sequence in the upcoming chapters of this guide.

8 Checklist to Setup and Configure the Performance Management v12 Acceleration Form

As a first time user a configuration checklist will guide you through the overall configuration process.

Refer this table to list out the basic tasks that you must complete to configure the Performance Management v12 Acceleration form:

Step	Action	Comments
1	Configure settings in Provisioning to enable the Performance Management module ➜ Remember As a customer, you do not have access to Provisioning. To complete tasks in Provisioning, contact SAP Cloud Support.	Unless this has been preconfigured
2	Configure settings in Provisioning to enable Total Goal Management / Career Development Planning module ➜ Remember As a customer, you do not have access to Provisioning. To complete tasks in Provisioning, contact SAP Cloud Support.	Unless this has been preconfigured
3	Configure Goal Management / Development Plan	If Goal Plan is needed. For more information, refer to **Goal Management** Guide, section 3 Getting Started - Configuration Overview.
4	Upload Goal / Development Plan in Provisioning	For more information, refer to **Goal Management** Guide, section 7 Permissions
5	Define the competency libraries, add or modify legal scan libraries, import a legal scan library file to the system, modify a dictionary to set up a spell checker for the forms	If needed
6	Configure/upload competencies	
8	Configure rating scales	
9	Create a route map	If needed
10	Make sure that the required settings have been configured in Provisioning, and that the Performance Management v12 Acceleration user interface and Stack Ranker have been enabled, if necessary.	

Step	Action	Comments
11	Upload the template from the SuccessStore4	
12	Configure the Performance Management form template.	
13	You can also add a template from the SuccessStore OR Configure the Performance Management form by initially uploading the XML template and update in Provisioning	
14	Configure Performance Management form sections	If needed
15	Activate the Stack Ranker	
16	Configure permissions for the Performance Management v12 template to display or not display pods.	
17	Configure permissions: • rating permissions for Performance Management v12/ or configure rating option for PM v11 • field permissions • section permissions • button permissions • action permissions	
18	Configure required fields	
19	Configure labels	Multi-locale: in Iteration1, hard coded in XML / English only; Starting with Iteration 2 define Message Keys and Upload Form Label Translations
20	Configure Performance / Potential Matrix	If needed
21	Enable Document Transfer	Unless reconfigured
22	Set up e-mail notification settings	
23	Set up RBP permissions	

9 Setting up the System prior to Configuring Performance Management Form

It is necessary to set up the system for Performance Management v12 Acceleration prior to configuring Performance Management Form.

You need to define the competency libraries, add or modify legal scan libraries, import a legal scan library file to the system, modify a dictionary to set up a spell checker for the forms, create or choose from existing rating scales and establish the workflow and steps that employees follow during the performance review process.

The following sections will discuss these Admin Features in detail.

9.1 Competencies

Competencies are the basic abilities employees should have to perform their role within the organization successfully. They are observable, measurable, and critical to individual and company performance.

Users refer to competencies during performance review process to evaluate how well an employee fulfilled their role requirements based on exhibit effort.

Competencies describe the contributing factors that enable employees to function in their role, such as knowledge , skills, abilities, and other professional characteristics and attributes. Competencies may be broken down into Core Competencies and Job Specific competencies.

Core Competencies	Job Specific Competencies
Competencies that are core to the organization.	Specific competencies by role, job, or other field of information.
The performance form can be configured to dynamically pull those competencies for all employees.	Once configured, these competencies can be displayed and evaluated on an individual's Performance and 360 Review forms.

Custom or hardcoded competencies can also be added to a Performance or 360 template.

It is important for you to understand the following:

- An employee and Manager must be able to rate and comment on demonstrated performance, based on competencies.
- Competencies must be items that can be evaluated, substantiated, and improved upon in the workplace.
- Corporate competencies are usually set as "core" competencies in the system, meaning that everyone within the organization receives them by default.

Competency Libraries

Competency Libraries are organizational links within SAP SuccessFactors containing individual competencies. They are the basis for Performance Review and 360 Degree Reviews. During the sales cycle, customers can choose to use one of the SAP SuccessFactors standard competency libraries or purchase a separate competency library from a third-party.

The SAP SuccessFactors competency libraries contain highly researched and behaviorally focused competencies.

Competency Elements

Each competency in SAP SuccessFactors has a name, a competency category, and ID, and GUID. Competencies can also have a description and additional components such as performance details.

9.1.1 Accessing Competencies

Use the following steps to access competency libraries.

Context

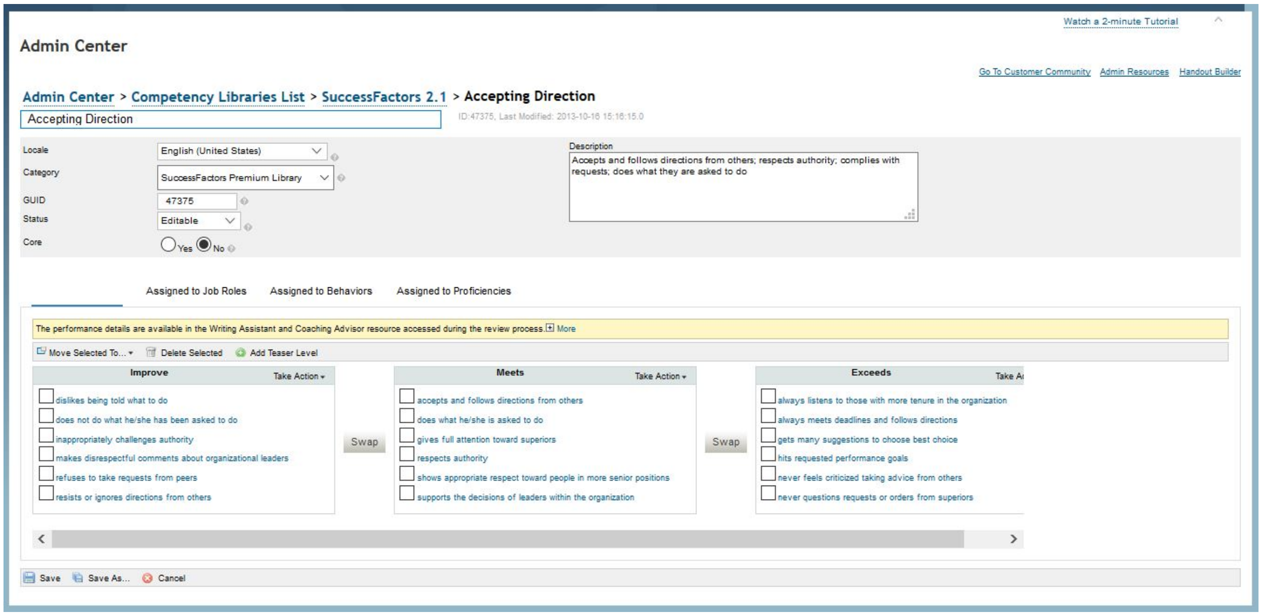
Procedure

1. Login to your instance as Admin.
2. Go to *Admin Center*.
3. In the*Company Processes &Cycles Portlet*, click *Company Settings*.
4. Click *Manage Competencies* to open *Competency Libraries List*

9.1.2 Manage Competencies

Competencies are the basic abilities required for an employee to perform their role within the organization successfully.

SuccessFactors provides a number of competency libraries that you can tailor to suit your needs. You can create your own competency libraries from scratch. You can also edit an existing compentency to add performance details.



For more information, refer to **Job Profile Builder** Guide, Section **Adding Competency and Skill**.

9.1.2.1 Adding a New Competency Library

SuccessFactors provides a number of competency libraries that you can tailor to suit your needs. You can also create your own competency libraries from scratch. The competency libraries contain a writing assistant and coaching advice.

Context

To add a pre-built competency library from the SuccessStore:

Procedure

1. Go to *Admin Center* > *Manage Competencies*.
2. From the *Competency Library List*, click *Add New Library* > *Choose from SuccessStore*.
3. Choose a library that you would like to add, then click *Add to My Instance*.
4. When the competency library is loaded, click the library and then click any competency then begin editing the key details. They are:

Option	Description
Name or description of the competency and the category	The category is most-often used to help organize information within this tool.
Performance Details	Text that appears in the writing assistant and coaching adviser.

5. If you want to identify a competency as core to your organization, for example if your organization has core values or mission competencies, select *Yes* in the *Core* field to tag or identify this competency as core to the organization.

   In the *Manage Templates* tool, you can set the form to dynamically pull the core competencies for all your employees when you launch the form.

   > **Note**
   >
   > If the **Core** flag is set in *Manage Templates,* users must mark also competencies as core in the Manage Competencies tool, otherwise this section will be blank for your users.

6. Under *Performance Details* click the text to update the tone and voice that you want to change.
7. When you have finished updating the text, click *Save*.

9.1.2.2 Editing Competencies

After you establish competency libraries, the next step is to modify existing competencies or add new competencies.

Context

You can modify or customize the content of existing competency libraries.

> **Note**
>
> Your changes affect only forms created after that change.

Procedure

1. Go to *Admin Center* > *Manage Competencies*.
2. On the *Competency Library List* screen, select the competency to edit.
3. Within the competency, edit any of the following: *Name*, *Category*, *Description*, *Performance Details*, *Core Settings*, *Job Role Assignments*, *Status*, or *Assigned Behaviors*.

9.1.2.3 Performance Details

You can use performance details to customize competencies and competency behaviors and work the same way with both. performance details are short but specific statements that describe actions, attitudes, or skills that demonstrate proficiency in the competency at a specific performance level.

You can organize performance details into multiple performance levels, such as Meets Expectations, Exceeds Expectations, or Needs Improvement.

When creating a new competency, you can create new performance details for that competency. For existing competencies, you can add, edit, reorganize, or delete performance details.

For example, to show that an employee meets the "Customer Focus" competency, you as an admin can create the following performance details:

- Follows through with customers
- Gets customer feedback

9.1.2.3.1 Editing Performance Details

The term "Performance Details" is only visible to the admin. Modifying performance details customizes Writing Assistant and Coaching Advisor text.

Context

Procedure

1. Go to *Admin Center* > *Manage Competencies*.
2. On the *Competency Library List* screen, select the competency to edit.
3. To move performance details to another performance level, select checkbox next to the *Performance Detail* and then click *Move Selected To...*. Select the performance level from the dropdown menu.
4. To delete a performance detail, elect checkbox next to the *Performance Detail* and then click *Delete Selected*. Click *Yes* to confirm deletion.
5. To edit a performance detail, click the teaser text. Edit the performance detail as necessary and then click *OK* to save. Click *Save* within the competency to save all changes.
6. To create new performance details, click the competency to edit. On the *Performance Detail* tab, click *Take Action* in the performance level where the new performance detail is desired, and then select *Add Teaser*.

   Enter the performance detail information, select the voice, and edit the tone. Click *OK* to save the performance detail. Click *Save* within the competency to save all changes.

9.1.2.4 Adding a New Competency

You can edit existing competencies in a competency library, or you can create new competencies from scratch.

Procedure

1. Go to *Admin Center* > *Company Settings* > *Manage Competencies*.
2. On the *Competency Library List* screen, select the competency to edit.
3. Click *Create New Competency*.
4. Enter the following competency attributes:
   - Competency Name
   - Description
   - Locale: This dropdown menu specifies the language in which the competency is written. For example when more than one language is used, each language has its own competency within the appropriate locale.

     > **Note**
     >
     > It cannot be edited in this page. To edit this, you can export the competency, update the locale and re-import.
   - Category: You must place each competency within a category. Use this category tag to both organize your competency library as well as filter competency sections of forms.
   - GUID: Global Unified Identifier is the unique alpha numeric value you have assigned to tag or identify your competency. If you have multiple locales, this unique number is what ties them together as being the same competency in different languages.
     For example, if the customer is located in Canada each competency must exist in both English (en-us) and French (fr_ca). As an admin you should create competencies for Customer Focus in each language:
     - Locale=en-us Customer Focus GUID: 7 ID: 7-Eng
     - Locale=fr-ca L'orientation cClient GUID: 7 ID: 7-Fr

     > **Note**
     >
     > The ID is slightly different, but the GUID is the same for each version. As a result, the French language version is pulled into the performance forms of French speaking employees, and the English language version is pulled into the performance forms of English-speaking employees.
   - Status: Each competency can have a status of Read Only, Editable or Hidden, which you choose when you create the competency. A Read Only status defines that you can read a competency but you cannot edit a competency. An Editable status defines that you can edit a competency. A Hidden status defines that end users can add the competency to a form or not.
   - Core: Selecting "Yes" designates the competency as "Core" competency. If desired, you can configure the performance form template so that core competencies are dynamically pulled into the performance form for each employee.
   - Description
5. Click *Save*.

6.

9.1.2.5 Adding a New Competency Category

You can add categories to the library either when you create new competency or when you edit an existing competency.

Context

You can use the category tag to both organize your competency library as well as filter competency sections of forms.

Procedure

1. Go to *Admin Center* > *Manage Competencies*.
2. On the *Competency Library List* screen, select the competency to edit.
3. Create a new competency or select an existing competency.
4. From with the competency, select the *Cetegory* menu.
5. At the bottom of the category list, select *Add Category*.
6. Type the new category name, and click *OK*.

9.1.2.6 Modifying Competencies using the Actions Menu

As seen previously, you can manage competencies by going into the competency itself. You can also make several changes from the *Actions* menu within the competency library.

Context

To modify Competencies using the Actions Menu:

Procedure

1. Go to *Admin Center* > *Manage Competencies*.

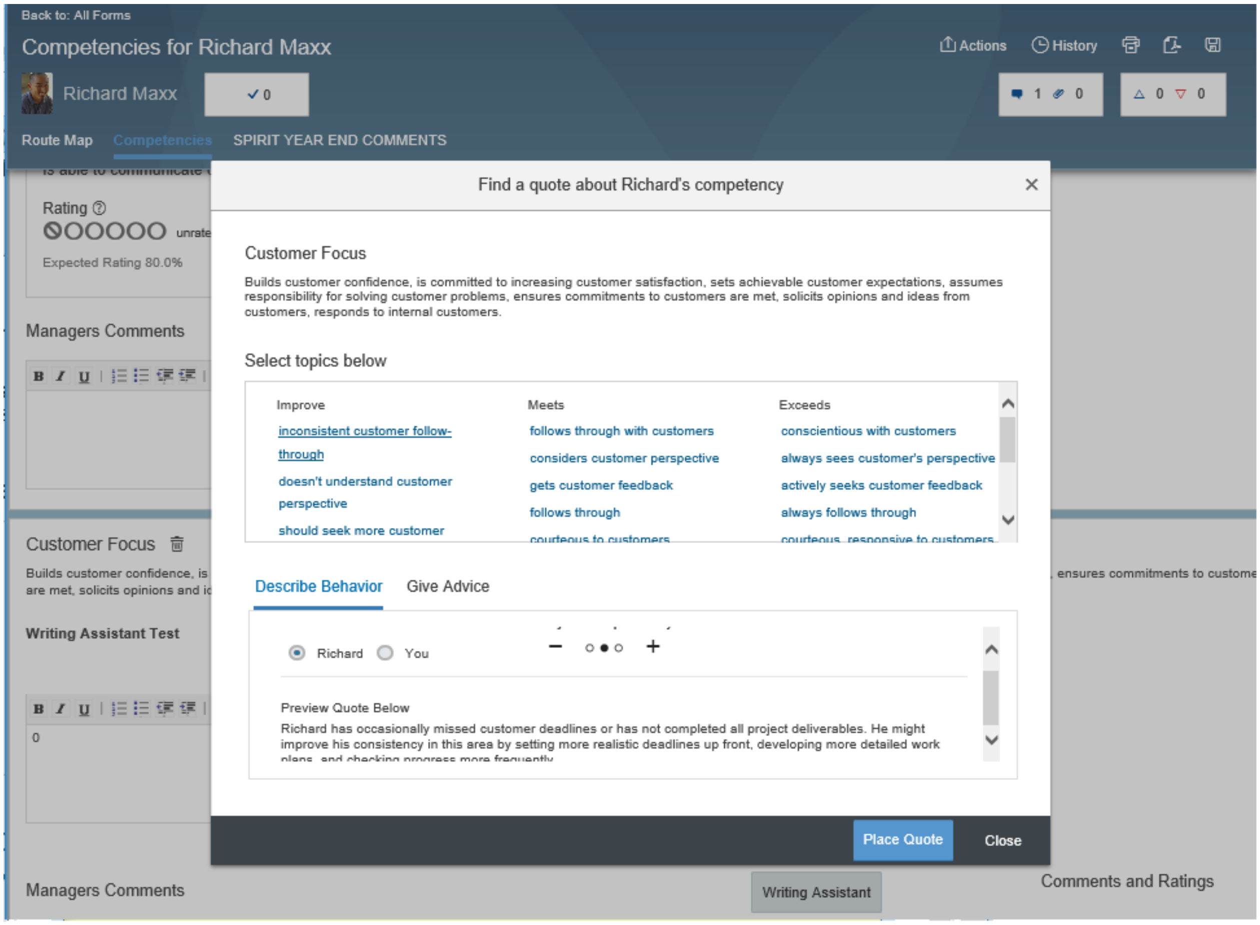
2. On the *Competency Library List* screen, select a competency to edit by selecting the checkbox to its left.
3. If the competency has an *Editable* status, click *Actions* button.
4. From this menu, you can perform the following actions:
    - Download All: Allows you to download all the competencies to be edited in .csv file.
    - Download: Allows you to download the selected competency to be edited in a .csv file.
    - Move to Another Category: Provides a list of existing categories so that the selected competency can be moved.
    - Delete: Allows you to delete the selected competency; this action cannot be undone.
    - Change Status: Allows you to change the status of the competency between Read Only, Hidden, and Editable.

9.2 Writing Assistant

Writing Assistant is a content development tool with an extensive library of development and mentoring recommendations. These recommendations help the Managers to provide targeted, effective and meaningful feedback to the employees.

Writing Assistant works with competencies. Writing Assistant adds the exact sentence in the form so you don't have to type anything at all. You can add as many sentences as you'd like, and once those sentences are in the form, you can modify them to better match your own writing style, or leave them as-is.

You can use Give Advice alone as a mentoring reference, or in conjunction with Writing Assistant to provide complete feedback. For example, you can use Writing Assistant to help you create useful evaluation comments, then turn to Give Advice to help you add suggestions that support your evaluation comments.



Point-of-view choices

You can have Writing Assistant present each sentence in one of three tenses. If your view doesn't show all three tense options, your company chose not to use them.

- 1st Person: Sentences that often start with I; for example: I am a team player.
- 2nd Person: Sentences that often start with You; for example: You are a team player.
- 3rd Person: Sentences that often start with a named person; for example: Richard is a team player.

Tone tuning

When you select a sentence, by default, the sentence is presented in a neutral tone; however, you can change the tone of the sentence to make it sound more positive or less positive, to better emphasize your perspective.

Adding paragraphs to your form

1. When you're evaluating a competency in a form, click *Writing Assistant* link to open the tool. For any given competency, there are multiple variations of descriptive and complete evaluation feedback sentences that you can automatically insert directly into a comment field in a form.
2. From the Writing Assistant window, click the *Give Advice* tab. From the *Give Advice* page, select the behavior description you want to use, then skim the listed feedback suggestions.
3. When you find the suggestion paragraph you want to use, click *Place Quote* and the suggestion paragraph is automatically added to the form. The *Give Advice* window remains open so that you can add more paragraphs.
4. When you're finished, close the window and you're returned to your form. Once back in the form, you can modify the placed paragraphs or leave them as-is and go on to the next competency.

9.2.1 Giving Feedback Using the Writing Assistant

You can access the Writing Assistant within the standard competency libraries, and you can create it for custom competency libraries.

Context

You can enable it on a section-by-section basis.

When you turn it on for a section users can see the *Writing Assistant* inside the Performance form's competency section or sections.

Procedure

1. You can access the Writing Assistant when completing a PMv12A Performance form or 360 Degree Review by clicking *Writing Assistant* icon.

   The *Writing Assistant* dialog box appears.
2. In the *Writing Assistant* dialog box, you can select the level of behavior that most closely describes the employee. Each level of behavior has teasers, which describes the behavior. The three level of teasers are same as version PMv11.
3. You can adjust the positivity of the language in the text and choose the voice.
4. Click *Place Quote* to automatically insert the customized comment into the comment box.

9.3 Spell Checker

You can use the Spell Check tool to make sure that the comments you've entered in a form are spelled correctly.

Prerequisites

- To use Spell Check in the application, ensure the *Provisioning* > *Company Settings* > *Spell Check* option is enabled.

  Remember

  As a customer, you do not have access to Provisioning. To complete tasks in Provisioning, contact SAP Cloud Support.

- To use Spell Check in the Performance form, enable *Spell Check* option from *Admin Center* > *Form Templates Settings* > *<Form>*.

Context

You can check the spelling for the entire form at once or use the spell check tool to flag words that are not spelled correctly in the comment field of the form.

Restriction

You will not be able to use the Spell Check tool in other areas of the form, such as goal titles and descriptions. The Goal fields are not editable on the form itself. You can use the *Edit Goal* dialog box to edit goals and then use the *Spell Check* tool to flag words that are not spelled correctly.

Procedure

1. To check the spelling for the entire form at once, click *Actions* on the top right corner of the Performance form and select *Spell Check the entire form*.
2. Each section of the form has its own Spell Check icon next to each comment field, to make it convenient to check spelling as you work.

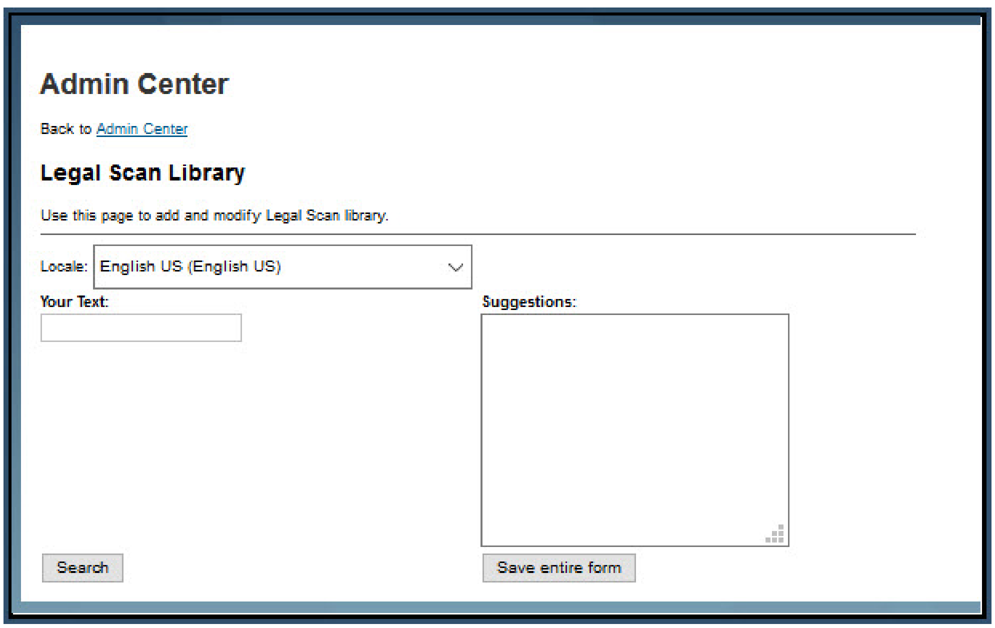
   When you finish adding comments to a section, click A-Z icon. Spell Check reviews the text in the comment field.

9.4 Legal Scan Library

The Legal Scan library is the content of the Legal Scan tool, which checks for potentially improper or discriminatory language in comment sections of forms.

> **Note**
>
> - To use Legal Scan in the application, ensure the *Provisioning* > *Company Settings* > *Legal Scan* option in Provisioning is enabled.
>
>   **Remember**
>
>   As a customer, you do not have access to Provisioning. To complete tasks in Provisioning, contact SAP Cloud Support.
>
> - To use Legal Scan in the Performance form, enable *Legal Scan* option from *Admin Center* > *Form Templates Settings* > *<Form>*.

You can use this page to add and modify Legal Scan library.



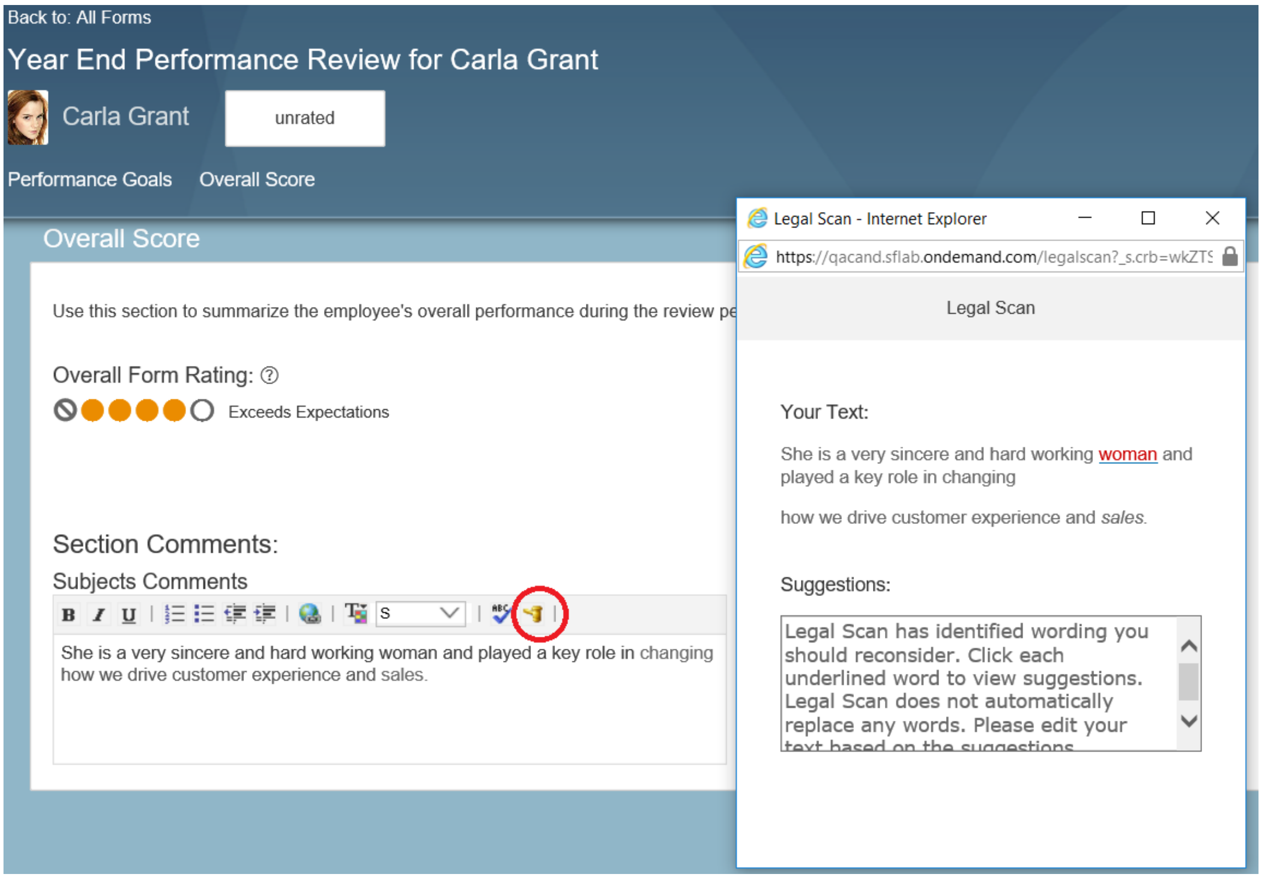
Customizing your Legal Scan library

PerformanceManager provides you with a basic Legal Scan library that contains common controversial terms. You can use the library as-is, or you can add other terms that your company deems controversial. You can add terms one at a time directly in Legal Scan library.

How does Legal Scan work?

Legal Scan works much like a spell-checker. After your users write their comments, they can check or scan the text in the comment sections. Legal Scan automatically reviews the selected text and displays (in red) any words that are potentially improper. When your users click the highlighted words, Legal Scan displays suggested actions or alternate terminology.

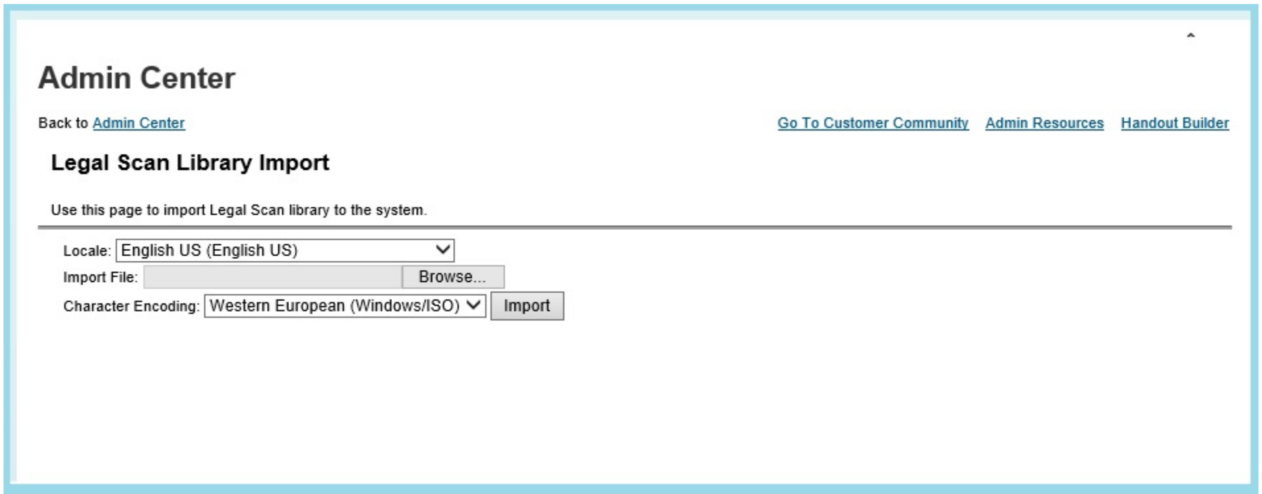
Legal Scan doesn't replace the flagged words; it only alerts your users to alternatives. Users can choose to change the existing text based on the suggestions.



9.5 Legal Scan Library Import

You can add terms one at a time directly in Legal Scan library. Or, if you have multiple terms, you can create a single flat file that contains all the terms, and upload the file using Legal Scan Library Import.

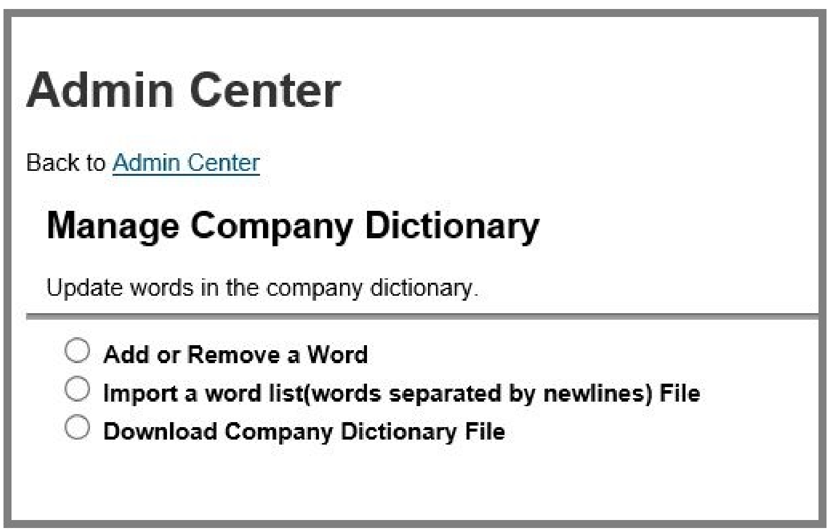
From this page you can browse for an legal scan library file and import it to the system.



9.6 Company Dictionary

This is a spell checker for the forms that are being used in the company.

You can modify the dictionary to add or remove a word, import a word list and download the Company Dictionary file.



9.7 Route Maps

Route Maps defines the workflow and the steps that employees should follow during the performance review process.

Route Maps defines the workflow and the steps that employees should follow during the performance review process. You can specify the personnel involved in the process and the sequence in which they will be acting upon the form. To use a route map, you associate it with a form template. Several form templates can be associated with one route map.

The stages in the route map specify the type of action employees can perform. You can specify which employees receive the form at each stage and what the employee is expected to accomplish when they receive the form. Forms go through three main stages:

- **Modification Stage**: In this stage, employees typically provides a Self Assessment on the Performance Management form, Managers review, assess, and evaluate the content of the form.
  This stage marks the start of the review process. The *Start of Review* option under *Show advanced option*indicates that the performance review process starts from this step. All following steps, including this step, are shown on the *Team Overview* page.

  > Note
  >
  > In a route map, only one step can be marked as *Start of Review*.

  You can also configure *Out of Turn Access* feature in this stage to allow reviewers to access a copy of the form via Team Overview page to provide their ratings before the form officially reaches them.
  For more information refer Out of Turn Access (OOTA) Permission [page 95].

  > Note
  >
  > The *Start of Review* option should be enabled prior to enabling the *Out of Turn Access*. Enabling the *Start of Review* option on a particular step will allow users to see the form from that step within the *Team Overview* page.

  Finally, you can enable *1:1 Meeting* option in the Modify step of the Route Map. After you have enabled this option, a *Confirm 1:1 Meeting* button will appear on the *Team Overview* page. You can click this button to route the form directly to the signature stage or the completion stage, without having to open the form.

  > Note
  >
  > - EM is the recommended role for 1:1 meeting.
  > - Only the last modify step can be set as 1:1 meeting step.
  > - 1:1 meeting step does not support Iterative and collaborative steps.

- **Signature Stage**: In this stage, users typically sign or approve the form or acknowledge that the form has been completed. The Signature Stage typically comes after the Modification Stage.
- **Completion Stage**: In this stage, the form is moved to the employees' Completed folder. This is the final stage of the form.

The Route Map can designate a specific job role involved in the review process and the order in which the employees will receive the form. For example, you can specify that the employee will get the form first, followed by the employee's manager, and finally, the employee's HR manager. You can also specify that the form must move back and forth between the employee and manager for planning purposes, before the form can move to the employee's HR manager.

9.7.1 Creating a Route Map

A route map specifies the order in which a form moves from one user to another and what users can do during each step. The next step in configuring the performance management review form is to configure the route map.

Prerequisites

To create a new Route Map or to modify an existing Route Map, enable *Routing Maps* from *Admin Center* > *Manage Permission Roles* > *[Permission Role]* > *Permissions* > *Permission settings* > *Administrator Permission* > *Manage Form Templates* .

Context

To use a route map, you must associate it with a form template. Several form templates can be associated with one route map. You can create a route map at any time. After you've created the route map, you'll have to associate the route map to a specific form template before it can be used. When you create a route map, you're designating the workflow and the steps that users take to move the form through the review process.

Procedure

1. Go to the *Admin Center*, and in the tools search field, enter *Manage Route maps*.

   The *Route Map List* page opens.
2. Click *Add New Route Map*, then select *Build Your Own*.

   The new routing map has three stages, Modify and Signature and Completion stages. You need to specify the users who receive the form and set other options for this step. You can also add more steps for each stage.
3. To add a step to the *Modify Stage*, click add button.

   In the *Create A New Modification Step* dialog box, enter a new step name and click *OK*.

   Similarly, you can add a step to the *Signature Stage* by clicking on the add button.

   > **Note**
   >
   > Because users can't modify the form at the Completion stage, you can't create steps for this stage. However, you can specify the Step Name and Step Introduction & Mouseover Text. These options are described in the following table.

   When you add a step, the page expands to show fields you need to complete for the step.
4. Complete the fields shown in the following table for each step you created.

   The following table lists all fields, some fields don't apply to all steps and don't appear in the list for those steps.

In this field...	Enter or select...
Step Name	The Step Name that will be displayed in the Route map within the form.
Step Description	The description that will give more context on the action that you are about to take. This description will appear in the To Do List on your Home page.
Step Type	◦ *Single Role* when you want the form to be shared with a single person in this step and not with a group of people. Example: You just want the employee to have an assigned action at this point in the process. ◦ *Iterative step*: This allows several users to work on a step. In this type of step, the form is sent to one user at a time, and that user sends the form to the other users specified in the step. This is the most commonly used step type when several users work on the step. If you use this type of step, you must also specify the roles to participate in the step. For example, I E EM EH specifies an iterative step between the employee, their manager, and the employee's HR representative. All the three roles will be able to make edits and send the form back and forth to each other before routing to the next step. You can specify any roles listed in Step Roles Available for a Route Map [page 94]. If you use the Iterative step, we recommend that you also specify the Entry User and Exit User. ◦ *Collaborative*: This allows several users to work on a step. In this type of step, the form is sent to all users at the same time. The form appears in all user's Inboxes, but only one user can work on it at a time. If you use this type of step, you must also specify the roles to participate in the step. For example, C E EM specifies a collaborative step between the employee and their manager. Both of them will be able to access the form for an executive review. You can specify any role listed in Step Roles Available for a Route Map [page 94]. If you use the Collaborative step, we recommend that you also specify the Entry User and Exit User.

In this field...	Enter or select...
Roles	The roles assigned to the user from the drop-down menu. The route map you are defining will use the roles assigned to these users to figure out who to send the processed form to. There are standard system roles in the drop down menu, but there is a custom option if your needs are more advanced. Examples of custom codes include: ○ R - Recruiter in Recruiting ○ W - Second recruiter in Recruiting ○ Q - VP of staffing in Recruiting ○ T - Primary coordinator in Recruiting ○ G - Hiring manager in Recruiting ○ EMMM - Employee's 3rd level Manager ○ S - Sourcer in Recruiting ○ I F - Family expert (only valid in the signature stage)
Start Date	The date on which you want employees to start working in this step. This means that forms can be moved into this step early, but employees shouldn't start work on this step until this date has passed. Setting a start date doesn't automatically lock the form. This means that the users can work on the step any time, even before the start date. If you want enforce the start date, select the *Enforce Start Date* checkbox. This will lock the form in read-only mode until the enforced start date is reached. This way, users won't be able to work on the step until the specified start date.
Exit Date	Enter the earliest date on which employees can move the form to the next step. Use this date only if you want to prevent employees from sending the form to the next step at any time. Note that if you're using the Automatically Send on Due Date option in the Due Date field, the Exit Date must be earlier than the Due Date.
Due Date	The date on which the step should be completed. If you want to have the form automatically forward to the next step on the due date, select the *Automatically send on due date* checkbox. Additionally, if you want to only send forms that pass the form validation check, select *Only send forms that pass validation*. Forms that don't pass validation aren't automatically moved to the next step. To send all forms regardless of whether they pass validation, select *Always send regardless of validation*.
Advanced Options	

In this field...	Enter or select...
Step Introduction & Mouseover text	The text users see when they point the mouse at the step. This text will appear only before the step is completed. ➜ Tip Use this field to provide a brief description of what users are expected to do during this step.
Step Name After Completion	This field is optional. The name of the step the user sees after the step is completed. If you leave this field blank, the step name remains the name specified in Step Name.
Step Mode	Specifies the extent to which users can modify the content of the form in this step. ○ *Full Edit*:Allows the user to change any content in text areas. ○ *Comment Only*: Allows the user to only add evaluation comments to the form. ○ *Signature* : Applies only to steps in the Signature stage and is the only option available in that Stage. Allows the user to electronically sign the form, but not modify the content.
Exit Button Text	The text for sending the form to the next step. This text appears on the Routing options button or dropdown menu for the step. This text also appears on the button on the confirmation page.
Step Exit Text	This field is optional. When the user sends the form to the next step, a confirmation page opens before the form is sent. The text you specify in this field appears on that confirmation page. ➜ Tip Use this field to let users know what they need to do and what their action means.
Previous Step Exit Button Text	The text for sending the form to the next step. This text appears on the Routing options button or dropdown menu for the step. This text also appears on the button on the confirmation page.

In this field...	Enter or select...
Previous Step Exit Text	This field is optional. When the user sends the form to the next step, a confirmation page opens before the form is sent. The text you specify in this field appears on that confirmation page. **Tip** Use this field to let users know what they need to do and what their action means.
Step Id	The ID that the system uses to identify the step internally. It is not the order of the step in the routing map.
Start of Review	This option to indicate that the review process starts from this part of the review, and ensures that a Team Overview page is created for the manager.
Out of Turn Access	This option is configured to grant out of turn access permission to the step owner to view and edit the form, before the form gets routed to the step owner's inbox.
1:1 Meeting	This option to set up a dedicated conversation between a manager and an employee.

5. Click *Save* at the top of the page.

   Your new routing map is saved and you'll see a confirmation message.

   > **Note**
   >
   > To use the new routing map, you must associate it with a form template.

9.7.2 Modifying a Route Map

You modify a route map, if you want to add or remove a step.

Prerequisites

To create a new Route Map or to modify an existing Route Map, enable *Routing Maps* from *Admin Center* > *Manage Permission Roles* > *[Permission Role]* > *Permissions* > *Permission settings* > *Administrator Permission* > *Manage Form Templates*.

Context

After you modify a Route map, the changed route map only applies to new forms created after the change. All existing forms retain the original routing map.

> **Note**
>
> SAP SuccessFactors uses job roles instead of employee names to specify who receives a form. This is because the same form template is typically distributed to multiple users, and it's easier for you to designate a role rather than a specific person. For example, if you're launching a performance review cycle for the entire company, you can specify that the form is sent to the subject of the review first. However, you can designate a specific person if it better meets your business requirements.

Procedure

1. Go to the *Admin Center*, and in the tools search field, enter *Manage Route maps*.

   The *Route Map List* page opens.
2. Click the name of the routing map you want to modify.

   The routing map you selected opens.
3. You can make any of the following changes:
   - Add a step to the Modification stage. To do this, click add button.
   - Add a Signature stage step. To do this, click add button.

     > **Note**
     >
     > Because users can't modify the form at the Completion stage, you can't create steps for this stage. However, you can specify the Step Name and Step Introduction & Mouseover Text. These options are described in the following table.
     >
     > When you add a step, the page expands to show fields you need to complete for the step.
   - Specify additional role or roles to receive a copy of the form after it's completed

     > **Note**
     >
     > If you don't specify any additional roles, the form appears in Completed folders only for users who are in the routing map.
   - Modify existing steps: To do this, modify any field as listed in the following table.

In this field...	Enter or select...
Step Name	The Step Name that will be displayed in the Route map within the form.

In this field...	Enter or select...
Step Description	The decription that will give more context on the action that you are about to take. This description will appear in the To Do List on your Home page.
Step Type	○ *Single Role* when you want the form to be shared with a single person in this step and not with a group of peo-ple. Example: You just want the employee to have an as-signed action at this point in the process. ○ *Iterative*: This allows multiple people to iterate back and forth before moving the form onto the next step. With the iterative step type, users will have a clear definition of who has the form in their inbox for editing and review, and who it will be routed to next. Unlike collaborative where the group gets the form all at the same time. Example: You want the manager and the employee to be able to make edits and send back and forth to each other before routing to the next step. ○ *Collaboration*: This allows multiple people to review and make edits to the form at the same time. With the col-laborative step type, only one user can edit the form at a time; but unlike the iterative step type, the form is ac-cessible in everyone's inbox. Example: You want the manager, second level manager and HR to be able to access the form for an executive review.
Roles	The roles assigned to the user from the drop down menu. The route map you are defining will use the roles assigned to these users to figure out who to send the processed form to. There are standard system roles in the drop down menu, but there is a custom option if your needs are more advanced. Examples of custom codes include: ○ R - Recruiter in Recruiting ○ W - Second recruiter in Recruiting ○ Q - VP of staffing in Recruiting ○ T - Primary coordinator in Recruiting ○ G - Hiring manager in Recruiting ○ EMMM - Employee's 3rd level Manager ○ S - Sourcer in Recruiting ○ I F - Family expert (only valid in the signature stage)

In this field...	Enter or select...
Start Date	The date on which you want employees to start working in this step. This means that forms can be moved into this step early, but employees shouldn't start work on this step until this date has passed. Setting a start date doesn't automatically lock the form. This means that the users can work on the step any time, even before the start date. If you want enforce the start date, select the *Enforce Start Date* checkbox. This will lock the form in read-only mode until the enforced start date is reached. This way, users won't be able to work on the step until the specified start date.
Exit Date	Enter the earliest date on which employees can move the form to the next step. Use this date only if you want to prevent employees from sending the form to the next step at any time. Note that if you're using the Automatically Send on Due Date option in the Due Date field, the Exit Date must be earlier than the Due Date.
Due Date	The date on which the step should be completed. If you want to have the form automatically forward to the next step on the due date, select the *Automatically send on due date* checkbox. Additionally, if you want to only send forms that pass the form validation check, select *Only send forms that pass validation*. Forms that don't pass validation aren't automatically moved to the next step. To send all forms regardless of whether they pass validation, select *Always send regardless of validation*.
Advanced Options	
Step Introduction & Mouseover text	The text users see when they point the mouse at the step. This text will appear only before the step is completed. **Tip** Use this field to provide a brief description of what users are expected to do during this step.
Step Name After Completion	This field is optional. The name of the step the user sees after the step is completed. If you leave this field blank, the step name remains the name specified in Step Name.

In this field...	Enter or select...
Step Mode	Specifies the extent to which users can modify the content of the form in this step. ◦ *Full Edit*:Allows the user to change any content in text areas. ◦ *Comment Only*: Allows the user to only add evaluation comments to the form. ◦ *Signature* : Applies only to steps in the Signature stage and is the only option available in that Stage. Allows the user to electronically sign the form, but not modify the content.
Exit Button Text	The text for sending the form to the next step. This text appears on the Routing options button or dropdown menu for the step. This text also appears on the button on the confirmation page.
Step Exit Text	This field is optional. When the user sends the form to the next step, a confirmation page opens before the form is sent. The text you specify in this field appears on that confirmation page. **Tip** Use this field to let users know what they need to do and what their action means.
Previous Step Exit Button Text	The text for sending the form to the next step. This text appears on the Routing options button or dropdown menu for the step. This text also appears on the button on the confirmation page.
Previous Step Exit Text	This field is optional. When the user sends the form to the next step, a confirmation page opens before the form is sent. The text you specify in this field appears on that confirmation page. **Tip** Use this field to let users know what they need to do and what their action means.
Step Id	The ID that the system uses to identify the step internally. It is not the order of the step in the routing map.

In this field...	Enter or select...
Start of Review	This option to indicate that the review process starts from this part of the review, and ensures that a Team Overview page is created for the manager.
Out of Turn Access	This option is configured to grant out of turn access permission to the step owner to view and edit the form, before the form gets routed to the step owner's inbox.
1:1 Meeting	This option to set up a dedicated conversation between a manager and an employee.

4. Click *Save* at the top of the page.

   Your changes are saved and you'll see a confirmation message.

9.7.3 Associating a Route Map with a Form Template

Associating a route map with a form template specifies workflow for the forms created from that form template.

Context

Each form template must have a route map associated with it. You can associate one route map with several form templates. You can also change the route map associated with a form template.

If you change a route map after you associate it with a form template or associate a different route map with a form template, the change is reflected only on new forms created from the form templates. Any existing forms retain the original route map.

> **Tip**
>
> You can associate a form template only to an existing route map. If you don't have a routing map that you want, you must create it first.
>
> To associate a routing map with a form template:

Procedure

1. Go to the Admin Center, and in the tools search field, enter *Form Template Settings*.

   The Managing Form Templates page opens. This page lists all existing form templates.
2. In the *Name* column, click the name of the form template you want.
3. From the *Route Map* dropdown menu, select the route map you want to associate with this template.

4. Click *Update Form Template*.

   Your changes are saved and you'll see a confirmation message at the top of the page.

   > **Note**
   >
   > All new forms which use this template will use the new route map. Any existing forms retain the original routing map.

9.7.4 Step Roles Available for a Route Map

The various roles involved at various steps of the Route map.

Role Name	Description
E	Employee
EM	Employee's manager
EH	Employee's HR Rep.
EA	The second level manager of an employee
EX	Employee's first matrix manager
C EEM	Collaborative step between employee and their manager
C E EM EX	Collaborative step among employee, their manager, and all employee's matrix managers
CEMEX	Collaborative step between employee's manager and all em-ployee's matrix managers
I EM E	Iterative step between employee and their manager
I E EM EX	Iterative step among employee, their manager, and all employ-ee's matrix managers
I EM EX	Iterative step between employee's manager and all employee's matrix managers
F	Form Reviewer
U	Specific user

9.7.5 Out of Turn Access (OOTA) Permission

Out of Turn Access allows roles to access a copy of the form via Team Overview for their own rating before the form officially reaches them.

This feature was developed so that the managers or reviewers can have an early access to the performance form, while the form is still with the employee.

Out of Turn Access needs to be enabled only for those steps that come after the step at which the form review starts. For example, the form review starts with the Self Assessment step; so, the Out of Turn Access can be enabled for the steps following the Self Assessment step.

Granting Out of Turn Access (OOTA) to the Reviewer Roles [page 96]
You can configure the Out of Turn Access permission to grant out of turn access to the reviewer roles, so that they can view and edit the Performance form of their direct reports', while the forms are still with the employees.

Out of Turn Access for Reviewer Roles [page 97]
When Out of Turn Access (OOTA) is enabled for reviewers, they can provide comments and ratings before the form reaches their inbox.

Out of Turn Access in the Iterative or Collaborative step [page 97]
Out of turn access is NOT supported for Iterative or Collaborative steps (I or C).

Retaining Out of Turn Access Feedback when Steps are Skipped [page 98]
When a reviewer provides comments and ratings using Out of Turn Access, and the OOTA enabled step is skipped while routing the form forward or backward, the comments and ratings provided by them will still be available in the form.

Document Transfer with Out of Turn Access [page 100]
During document transfer, the comments and ratings provided by the old manager appears only in the draft version of the form, that is, when the new manager views the form in the employee's inbox. The comments and ratings provided by the old Manager gets deleted once the form is routed to the new manager's inbox.

Stack Ranking Employees with Out of Turn Access Enabled [page 101]
This feature allows the reviewer roles to access the Stack Ranker page to rate competencies for the team members before the form is routed to their inbox.

Limitations [page 102]
Out of Turn Access feature allows both the employee as well as the role based reviewers, to edit the Performance Review form simultaneously. Therefore it is likely that both parties can run into potential issues while editing the form.

9.7.5.1 Granting Out of Turn Access (OOTA) to the Reviewer Roles

You can configure the Out of Turn Access permission to grant out of turn access to the reviewer roles, so that they can view and edit the Performance form of their direct reports', while the forms are still with the employees.

Prerequisites

The *Start of Review* option should be enabled prior to enabling the *Out of Turn Access*. Enabling the *Start of Review* option on a particular step will allow users to see the form from that step within the *Team Overview* page.

> **Note**
>
> The Team Overview page is created when the Team Overview option is enabled in *Admin Center* > *Manage Permission Roles*.

To enable the *Out of Turn Access* option:

Procedure

1. Go to *Admin Center* > *Manage Templates* and select the Performance Review template for which you want to enable the Out of Turn Access feature.

   Check the Route Map that is being used by this Performance Review template.
2. Go to *Admin Center* > *Manage Route Map* and select the route map being used in the Performance Review template under consideration.
3. In the Route map, go to *Advance Options* and select *Out of Turn Access* for the reviewer roles you want to grant the Out of Turn Access.

   > **Note**
   >
   > You can enable the *Out of Turn Access* option only for those steps in the Route map that come after the step at which the form review starts. For example, the form review starts with the Self Assessment step; so, the *Out of Turn Access* can be enabled for the steps following the Self Assessment step.

Results

Out of Turn Access is granted to the reviewer role.

9.7.5.2 Out of Turn Access for Reviewer Roles

When Out of Turn Access (OOTA) is enabled for reviewers, they can provide comments and ratings before the form reaches their inbox.

When Out of Turn Access (OOTA) is granted to the EM and the EX in the Route Map, the *Review <employee>* button becomes available to them in the E step, that is, when the form is with the employee. All ratings and comments made by the EM and the EX appear on the form without any loss of data, when the form is eventually routed to them in the Manager Assessment steps.

Special Case

There is an exception when there are two steps, EM1 and EM2, dedicated to the same Manager.

In this case, Out of Turn Access(OOTA) permission is granted for both the steps as EM1(OOTA) and EM2(OOTA), but only EM1 with Out of Turn Access (OOTA) can edit the form.

Steps in the RouteMap: E(current) → EM1(OOTA) → EM2 (OOTA)

Expected Behaviour:

- E(current) step: EM1 with Out of Turn Access (OOTA) can edit the form, which means only one *Review <employee>* button will be available in the Self Assessment step. The *Review <employee>* button will not be available for EM2.
- EM1(OOTA): When form is routed to EM1 Assessment step, all the ratings and comments made in the Self Assessment step will be displayed on form without any loss of data.

9.7.5.3 Out of Turn Access in the Iterative or Collaborative step

Out of turn access is NOT supported for Iterative or Collaborative steps (I or C).

Consider a Route Map CEEMEX or IEEMEX(current) → EM(OOTA) → EX(OOTA). The current step in the Route map is the Iterative or Collaborative step between E, EM and EX, where both the managers have the Out of Turn Access(OOTA) access enabled in the subsequent steps.

In this case, neither the EM nor the EX will have the Out Of Turn Access(OOTA) permissions based on the next step configurations. However, when form is routed to EM Assessment step, the Out Of Turn Access(OOTA) will be applied to the EX role.

Special Case

There is an exception when Out of Turn Access(OOTA) is configured for a role that does not play a part in the Iterative or Collaborative step.

Steps in the RouteMap: CEEM or IEEM(current)→ EX(OOTA)

Out of Turn Access(OOTA) is configured for the EX Role but the EX does not play a part in the Iterative or Collaborative step. In this case, EX will have the Out Of Turn Access(OOTA) permissions based on the EX(OOTA) step configuration.

9.7.5.4 Retaining Out of Turn Access Feedback when Steps are Skipped

When a reviewer provides comments and ratings using Out of Turn Access, and the OOTA enabled step is skipped while routing the form forward or backward, the comments and ratings provided by them will still be available in the form.

Context

To skip the (OOTA enabled) step:

Procedure

1. Go to *Admin Center* > *Route Document*, and search for the Performance form.
2. Select the form that you want to modify from the list and click *Next*.
3. Go to the step prior to the OOTA enabled step.
4. To skip forward, select *Move the form one step forward* under *How do you want to route the form?*.

   To skip backward, select *Move the form one step back*.
5. Select an appropriate reason for skipping the step and click *Next*.

1. Skipping Out of Turn Access Step to Route the Form Forward [page 98]
   While routing the Performance form, if their OOTA enabled step is skipped to route the form forward, their comments and ratings will still be available in the Performance form, without any loss of data.
2. Skipping Out of Turn Access Step to Route the Form Backward [page 99]
   While routing the Performance form, if their (OOTA enabled) step is skipped to route the form backward, their comments and ratings will still be available in the Performance form.

9.7.5.4.1 Skipping Out of Turn Access Step to Route the Form Forward

While routing the Performance form, if their OOTA enabled step is skipped to route the form forward, their comments and ratings will still be available in the Performance form, without any loss of data.

Let us consider the following examples:

- **Example 1:**
  Steps in the RouteMap: E→ EM1(OOTA)→ EM2
  In this case when the form is routed from the E step to EM2 step, skipping EM1(OOTA) step, all the ratings and comments provided using Out of Turn Access(OOTA) by EM1 will appear on the form, without any loss of data, in the EM2 step.
- **Example 2:**
  Steps in the RouteMap: E→EM(OOTA)→ EX(OOTA)→CEMEX
  In this case when the form is routed from the E step to the Collaborative (CEMEX) step, skipping EM(OOTA) and EX(OOTA) steps, all the ratings and comments provided using Out of Turn Access(OOTA) by EM and EX will appear on the form, without any loss of data, in the CEMEX step.
- **Example 3:**
  Steps in the RouteMap: E→ EM1(OOTA)→EX→ EM2(OOTA)
  - EX step: When the form is routed from the E step to EX step, skipping EM1(OOTA) step, all the ratings and comments provided using Out of Turn Access(OOTA) by EM1 will appear on the form, without any loss of data, in the EX step.
  - EM2(OOTA): Also all the ratings and comments provided using Out of Turn Access(OOTA) by EM1 will appear on the form, without any loss of data, in the EM2(OOTA) step.

Parent topic: Retaining Out of Turn Access Feedback when Steps are Skipped [page 98]

Next: Skipping Out of Turn Access Step to Route the Form Backward [page 99]

9.7.5.4.2 Skipping Out of Turn Access Step to Route the Form Backward

While routing the Performance form, if their (OOTA enabled) step is skipped to route the form backward, their comments and ratings will still be available in the Performance form.

Let us consider the following examples:

- **Example 1:**
  Steps in the RouteMap: E→ EM(OOTA)→ EX

  > **Note**
  >
  > EM will still have OOTA permission in this step.

  In this case when the form is routed from the EX step to E step, skipping EM(OOTA) step, all the ratings and comments provided using Out of Turn Access(OOTA) by EM will appear on the form, without any loss of data, in the E step.
- **Example 2:**
  Steps in the RouteMap: E1→ EM(OOTA)→ EX(OOTA)→E2
  In this case when the form is routed from the E2 step to E1 step, skipping EM(OOTA) step and EX(OOTA) step, all the ratings and comments provided using Out of Turn Access(OOTA) by EM and EX will appear on the form, without any loss of data, in the E1 step.

Parent topic: Retaining Out of Turn Access Feedback when Steps are Skipped [page 98]

Previous: Skipping Out of Turn Access Step to Route the Form Forward [page 98]

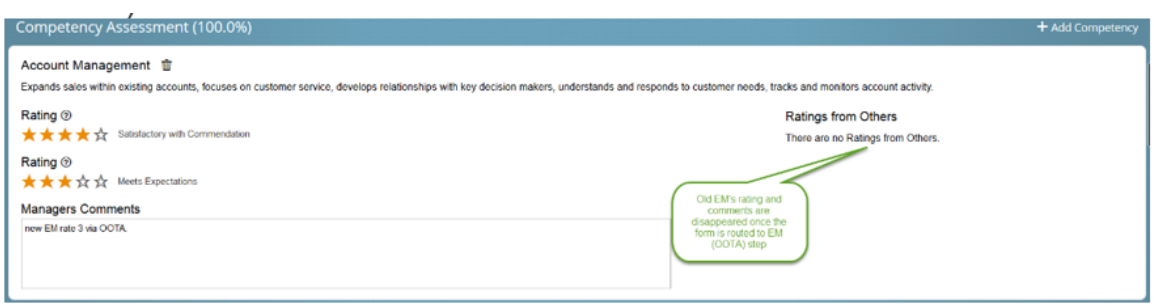
9.7.5.5 Document Transfer with Out of Turn Access

During document transfer, the comments and ratings provided by the old manager appears only in the draft version of the form, that is, when the new manager views the form in the employee's inbox. The comments and ratings provided by the old Manager gets deleted once the form is routed to the new manager's inbox.

> **Note**
>
> There are 3 basic cases, the behaviors are same for different document transfer methods, example document transfer, user import, and so on. Also, both the EM and the EX display the same behavior during document transfer.

> **Note**
>
> If the manager change takes place in OOTA step (EM1 step), upon routing of the form, only the new manager's draft is merged with the form. This means old manager's draft comments in the OOTA step will not be visible to the new manager when the form is routed to the next step (EM2 step). If the manager change takes place in the manager step (EM2 step), all comments entered by the old manager are preserved and saved.

- **Case 1: When the form is transferred from the old EM to the new EM**
  Steps in the RouteMap: E(current) → (Old EM or EX(OOTA) → New EM or EX(OOTA))
  Behaviour:
  - After the transfer, the old EM cannot view the form in Team Overview page.
  - New EM can view the form in Team Overview page with the following text: *<old EM name>'s Score: unrated**. By moving the mouse over the *unrated** link, the following text message appears: *<old EM name> gave this score before <Subject first name> transferred on <manager change date>*.

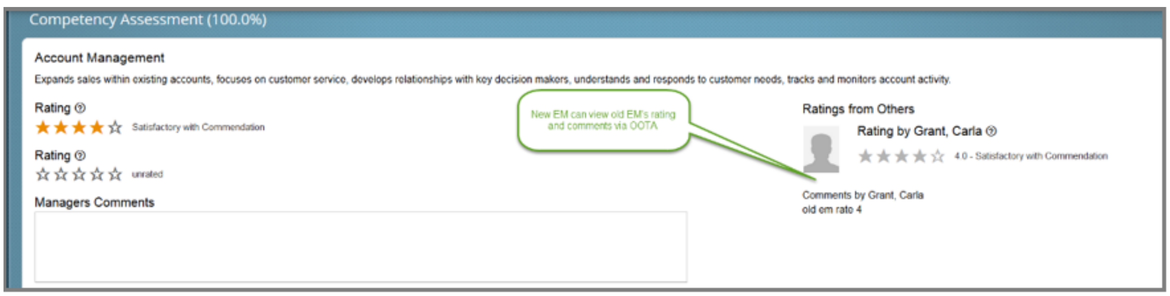


> **Note**
>
> Since the form is in draft, as it is still with the employee, the rating score from the old EM is displayed as *unrated*.

  - By clicking on the *Review <Subject>* button, the new EM can see the old EM's self rating and comments, on the right side of the page, under *Ratings from Others*.

- When the form is routed to the new EM's inbox, that is, in the EM(OOTA) step, the comments and ratings provided by the old Manager gets deleted.

> **Note**
>
> Since the userId of the old EM is different from the new EM, the draft gets deleted and won't get merged.



- **Case 2: When the form is transferred from the old EM to the NO manager state**
  Steps in the RouteMap: E(current) → (Old EM or EX(OOTA) → No manager) → ES
  Behavior: In this case the draft of the old EM gets deleted in the backend after the document transfer.
  - When form is in the E step, the old EM can view the form in Team Overview page, but the *Review <Subject>* button is not available.
  - After the form is routed to the ES step, Old EM can still view the form in Team Overview page, but with the following text : *The system could not find a user in this role or the step is skipped.*
- **Case 3: When the form is transferred from the NO manager state to the new EM**
  Steps in the RouteMap: E(current) → (No manager -> add EM or EX(OOTA)) → ES
  Behavior: In this case a new draft for the new EM or EX is added automatically in backend.
  - After the new EM is added, the new EM can view the form in Team Overview page with the *Review <Subject>* button to access the form.

9.7.5.6 Stack Ranking Employees with Out of Turn Access Enabled

This feature allows the reviewer roles to access the Stack Ranker page to rate competencies for the team members before the form is routed to their inbox.

For the manager to be able to access the Stack Ranker page to rate competencies for the team members using OOTA, the *use-behavior* parameter should be set to *false* in Provisioning.

> **Remember**
>
> As a customer, you do not have access to Provisioning. To complete tasks in Provisioning, contact SAP Cloud Support.

Consider the Route Map E(current)->EM(OOTA)->ES, where *use-behavior=false* and </my-team-rater> is configured in Form Template.

In this case, the EM can view the *Stack Ranker* button on the Team Overview page and rate the competencies for the team members. Also, all competencies item ratings, and competency section comments made by the EM using OOTA appear on the form without any loss of data.

Special Case

If the *use-behavior=true*, the Stack Ranker feature will be disabled for the template. When the manager clicks *Stack Ranker* on the Team Overview page to provide his ratings using OOTA, the following permission error appears: *You do not have permission to rank these users.*

9.7.5.7 Limitations

Out of Turn Access feature allows both the employee as well as the role based reviewers, to edit the Performance Review form simultaneously. Therefore it is likely that both parties can run into potential issues while editing the form.

Here's the list of limitations that you might run into when Out of Turn Access is enabled for the reviewer roles:

- Out of Turn Access cannot be enabled for either Iterative (I) or Collaborative (C) workflow step (the checkbox of "Out of Turn Access" is disabled in route map).
- Addition and Deletion of item is disabled.
- Item weights and section weights cannot be edited.
- Custom sections cannot be edited.
- Custom elements in Objective or Competency items are disabled.
- Print and Save as PDF buttons will not available on the form that has Out of Turn Access enabled.
- OOTA for EMM doesn't work as expected, where under the *Others Rating* tab, the EMM cannot see the correct item-ratings provided by the EM role in previous step.
  The issue occurs when
  - EM/EMM both have write permission in specific steps
  - EMM has OOTA enabled
  - EM updates the rating before OOTA rating merge

Let us consider the following Route map: Step1(E) =>Step2(EM-OOTA) => Step3(EMM-OOTA)

1. Create a route map with first step as E, second step as EM, third step as EMM. Enable Out of turn Access for both EM and EMM.
2. Associate route map with a form. Enable form routing to previous step.
3. Launch a new form and send it to manager.

4. EM provides a rating of 3.0 and sends it to the next step.
5. EMM routes the form back to EM to change the rating.
6. EM provides a rating of 5.0 and sends the form back to EMM.
7. EMM cannot see the updated rating. EMM will see a rating of 3.0.

9.7.5.7.1 OOTA behaviors

OOTA can be performed only if there is no other step exists for the same user.

Let us consider the folowing route map:

E(current) -> EM -> E -> EM(OOTA) -> EX(OOTA)

In this Route map, only EX has OOTA access now. EM(OOTA) has no effect now as there is another EM step prior to the EM(OOTA) step. The manager can have OOTA access when this form is in the second E step(E -> EM -> E(current) -> EM(OOTA) -> EX(OOTA)).

Example:

- E -> E -> EM(OOTA) The EM OOTA draft will be created in form creation.
- E -> I (E, EM) -> E -> EM(OOTA) The EM OOTA draft will NOT be created in form creation.

Form draft logic in form creation

- Get every user's first pending step.
- Create drafts for the steps OOTA enabled.

Example: E -> EM -> EX(OOTA) -> EM(OOTA)

Only create form draft for the EX step.

Form draft logic in form routing forward

- Merge drafts: Merge all drafts in crossed steps.
  Example: E(old current step) -> EM(OOTA) -> EX(OOTA) -> E(new current step) -> EH(OOTA)
  There are two form drafts merged.
- Create drafts
  1. Get all passed users.
  2. Loop the passed users and check whether there is OOTA step in the first pending steps of the passed users.
  3. Create draft for the valid OOTA steps.

Example: E(old current step) -> EM(OOTA) -> EX(OOTA) -> E(new current step) -> EH(OOTA)

Create draft for the EH(OOTA) step.

Form draft logic in form routing backward

- Merge drafts: Merge all drafts in crossed steps.
  E(new current step) -> EM(OOTA) -> EX(OOTA) -> E(old current step) -> EH(OOTA)
  There is one form draft merged.
- Create drafts
  1. Get every user's first pending step.
  2. Create drafts for the steps OOTA enabled.

Example: E(new current step) -> EM(OOTA) -> EX(OOTA) -> E(old current step) -> EH(OOTA)

Create three drafts.

Save form

The form lock does not get released since the OOTA user is not the form owner.

Form draft logic in form documents transfer

When manager change occurs, you should update draft information to allow new manager be able to view form via OOTA.

Update draft owner

If both the old manager and the new manager are valid users, the owner of form draft will be updated.

Delete drafts

If a form is transferred from an old manager to NO_MANAGER, the draft of old manager will be deleted. And we won't merge the draft.

Create draft

If a form is transfered from NO_MANAGER to a new manager, system will auto generate a new form draft for new manager if there is a pending OOTA step.

EX transfer

Matrix manager transfer displays the same behaviors as EM transfer.

9.8 Rating Scales

To create a form you need a Rating Scale. A rating scale is a tool used during the evaluation process to qualify a reviewer's perspective on the employees performance.

You can choose from the predefined rating scales that are based on best practices, but you can also create a new rating scale using the Rating Scale Designer. The default rating scale contains 5 points, with 1 being the lowest rating and 5 is the highest.

> **Note**
>
> We recommend using a 5-point rating scale.

If you wish to reverse the rating scale, it can be done from Provisioning. Enable *Rating Scale Order: lower values are considered MORE favorable (e.g. 1 is better than 5) (Used for Dashboards & Reports only)* from *Provisioning* > *Company Settings*. Once the scale is reversed, it applies to all rating scales in the Performance forms. This is a system wide setting that also affects reports.

> **Remember**
>
> As a customer, you do not have access to Provisioning. To complete tasks in Provisioning, contact SAP Cloud Support.

Rating Scale Options

Scale type	Advantages and Drawbacks
7-Point scale	This type of scale may offer too much differentiation, as scores are too close to be of much value.
5-Point scale	This type of scale contains a midpoint and allows for the most useful level of differentiation.
4-Point scale	This type of scale lack a neutral midpoint and so evaluations tend to be artificially skewed towards one end of the scale or the other.

Scale type	Advantages and Drawbacks
3-Point scale	This type of scale does not provide enough differentiation, which often leads to inaccuracies and too many neutral ratings.

9.8.1 Creating a Rating Scale

A rating scale is required before creating a form template. SuccessFactors comes with a number of predefined rating scales that are based on best practices, but you can also create a new rating scale using the Rating Scale Designer. We recommend using a 5-point rating scale.

Prerequisites

To create a new Rating Scale and to modify an existing Rating Scale, enable *Rating Scales* from *Admin Center* > *Manage Permission Roles* > *[Permission Role]* > *Permissions* > *Permission settings* > *Administrator Permission* > *Manage Form Templates*.

Procedure

1. To create a new rating scale, select *Admin Center* > *Rating Scales*.
2. In the *Rating Scale Designer*, select *Create New Rating Scale*.
3. Type a name for your rating scale and a description.
   A rating scale with a range of 1-5 appears on the page. You can also choose from among these options:
   - 1-3
   - 1-5
   - 1-7
   - Build your own
4. Select one of the rating scale options.
5. The scores are entered by default depending on the option you choose. SuccessFactors also proposes labels and descriptions for each label. If you wish to modify the label or description, enter your changes.

Option	Description
If you choose this option	**Do this**
Pre-built rating scale	Modify the *Label* and *Description* or leave the default values.
Build your own	Enter a *Score*, *Label*, and *Description*

Option	Description
	Click *Add New Score* to add lines to your scale.
Generate a rating scale based on ○ **Minimum score** ○ **Maximum score** ○ **Increment**	Enter values for: ○ *Low* ○ *High* ○ *Increment* Then click *Generate*.

6. Click *Save*.
   The rating scale appears in the list of available rating scales.

   > **Note**
   >
   > You can create a rating scale with up to 40 levels via the Admin Center.

Next Steps

It is possible to reverse the order of rating scales so that a low number is associated with a high rating. Reversing the rating scale is configured in Provisioning.

> **Remember**
>
> As a customer, you do not have access to Provisioning. To complete tasks in Provisioning, contact SAP Cloud Support.

Related Information

Reversing Rating Scales [page 319]

10 Configuring Templates Using Admin Center

After setting up the system for Performance Management v12 Acceleration, you need to Manage Forms and configure Form Templates settings .

You can create content, configure settings and form templates by using the features listed under Performance Management in the Admin Center.

A template is where the configuration and structure of forms is set and recorded.

Regardless of whether you add a new template from the *SuccessStore*, or if you modify an existing template, you need to define the general settings and then edit the fields and sections.

After you have defined the general settings you need to edit the other fields and sections in the form.

In earlier versions of Performance Management, the designation of a role other than the direct manager (EM) role as the official rater of a form in Performance Management v12 templates was configured via a permission called official rating permission. This configuration is no longer supported in Performance Management v12 Acceleration

You can configure field permissions and section permissions for a Performance Template using the Show Advanced Options in Manage Templates.

You can configure roles to view or modify various sections or fields in a Performance Management template, by granting or denying permissions. You can also configure roles to add or remove items from a Performance Management template.

10.1 Managing Templates

A template is where the configuration and structure of forms is set and recorded.

When forms are launched, they will appear and behave as configured in the template. The manage templates tool allows you to update your SuccessFactors process forms and plans quickly and easily.

In the manage templates tool you can:

- Add a new template
- Copy a form or plan from a previous year
- Change labels
- Reorder sections

If you have permission to Comprehensive template configuration for Performance Management V12, you can also make advanced configuration changes. This includes modifying permissions and configuring rating and comment options.

Before you begin editing templates, make sure that you have selected a route map and a rating scale.

Parent topic: Configuring Templates Using Admin Center [page 108]

Related Information

Configuring the Template: General Settings [page 110]
Fields and Sections [page 131]
Rating Options [page 156]
Configuring Desired Field and Section Permissions: Advanced Options [page 165]
Configuring Custom Roles Using Manage Templates [page 167]

10.1.1 Adding a New Template from the SuccessStore

Describes how you can add a new template from the SuccessStore.

Procedure

1. Go to *Admin Center*, in the tools search field type *Manage Templates*.
   The *Manage Template* page opens.
2. On the *Manage Templates* page, select *Performance Review* tab.
3. Select *Add a New Template*.
   The SuccessStore opens to display a number of pre-built templates for the type of form that you want to create.
4. In the *SuccessStore* window, you can click the name of the template to see a preview of the form.
5. Choose the template that you want to use, for example, Manager Evaluation Template, then click *Add to My Instance*.
6. In the *Save as New Template* dialog, type a name for your template, then click *Save*.

Next Steps

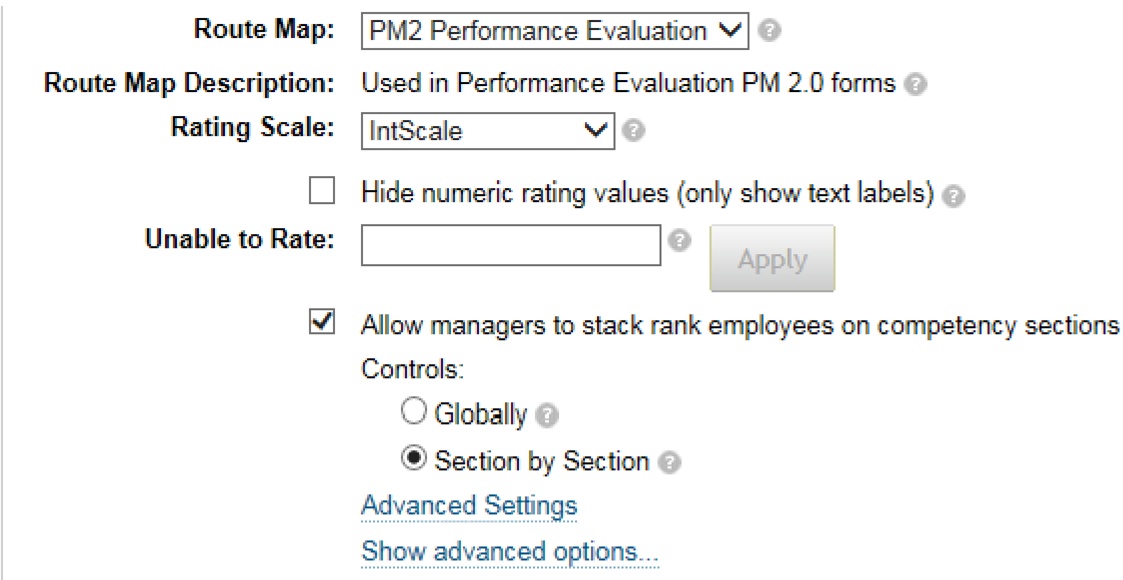
The next steps are to define the *General Settings* and to configure the *Fields and Sections* from the tabs on the left side of the screen. You define the foundational pieces of your template such as the name and description on this page as well as the rating scale and the route map.

10.2 Configuring the Template: General Settings

Regardless of whether you add a new template from the *SuccessStore*, or if you modify an existing template, you need to define the general settings and then edit the fields and sections.

The *General Settings* page is where you define the basic fields of your template such as name and description. This is where you define the rating scale and add a route map. When you add a route map, you also indicate how the form will be routed when it is launched.

In the General Settings you can also allow managers to stack rank employees on competency sections.



Parent topic: Configuring Templates Using Admin Center [page 108]

Related Information

Managing Templates [page 108]
Fields and Sections [page 131]
Rating Options [page 156]
Configuring Desired Field and Section Permissions: Advanced Options [page 165]
Configuring Custom Roles Using Manage Templates [page 167]

10.2.1 Understanding the Message Key

You enter text for a localized label in the *Localize PM Template Label* dialog box.

The system does not initially display the message key the first time you use the *Localize PM Template Label* dialog box. The reason is because the key is a unique random number generated in the back end. You need to save the template for the system to generate the message key for the label. Once you have saved the template, you can customize the message key.

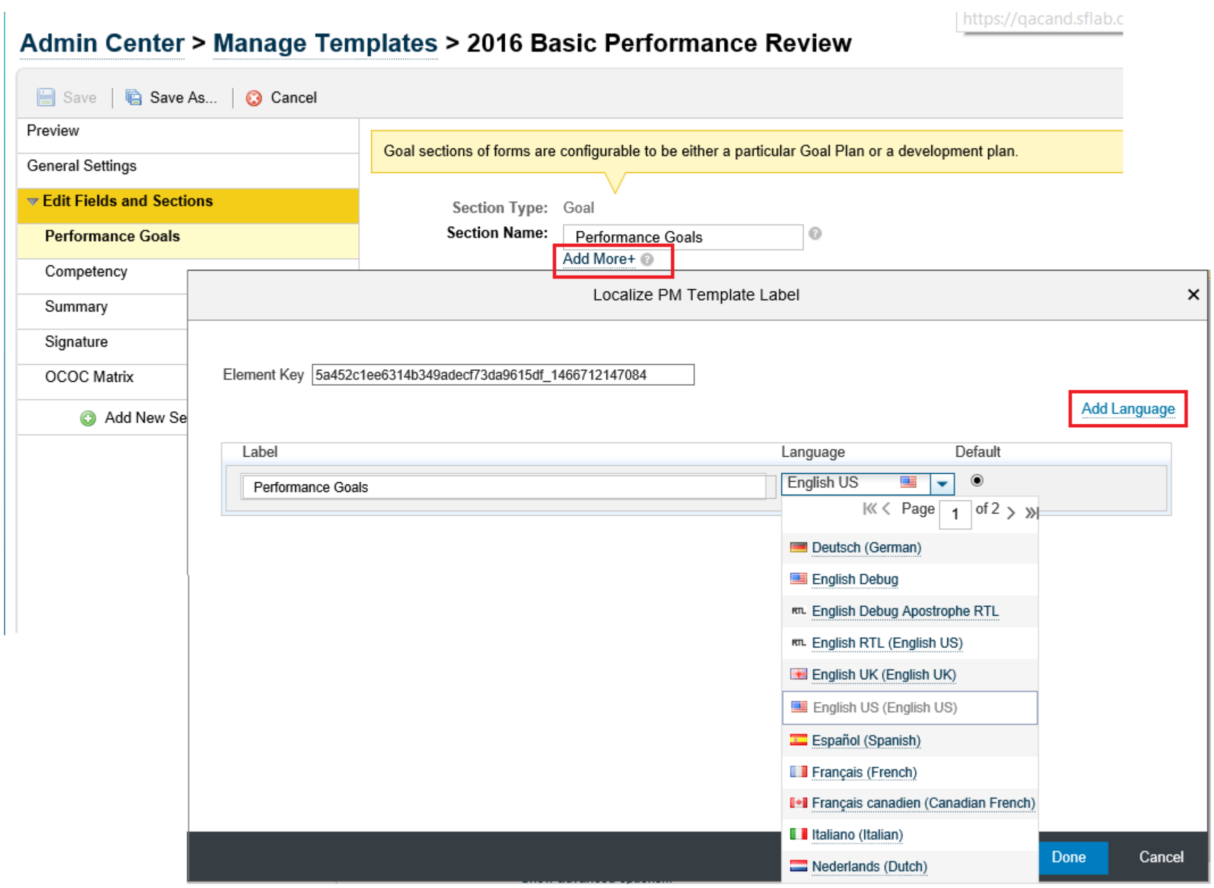
> **Note**
>
> You are not required to first configure the message in the template. However, If the key has already been configured via XML, the dialog box displays the message key, and you can make any necessary edits directly from the interface.

10.2.1.1 Localizing Labels

You can localize labels in the review form in either the *General Settings* or in specific *Fields and Sections*.

To add a language to a label, in the section where you want to add the label:

1. Click the *Add More+*.



2. In the *Localize PM Template Label* dialog box, click *Add Language*.
3. Type a text for the label, then select the language.
4. Click *Done*.

10.2.1.2 Editing the Message Key ID

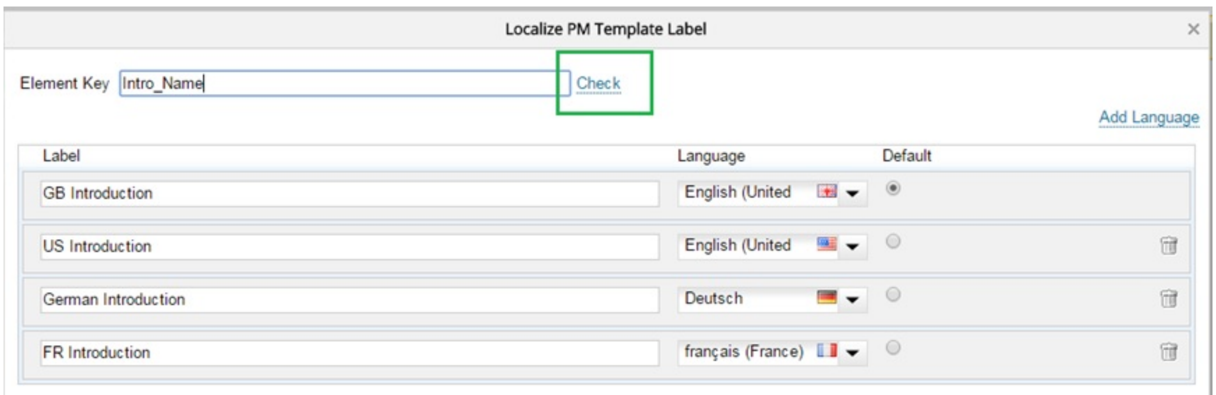
Users can edit and reuse an existing message key ID associated with a template.

Context

When a template is copied using the *Save As* feature, the existing message key IDs associated with the original template are copied to the new template.

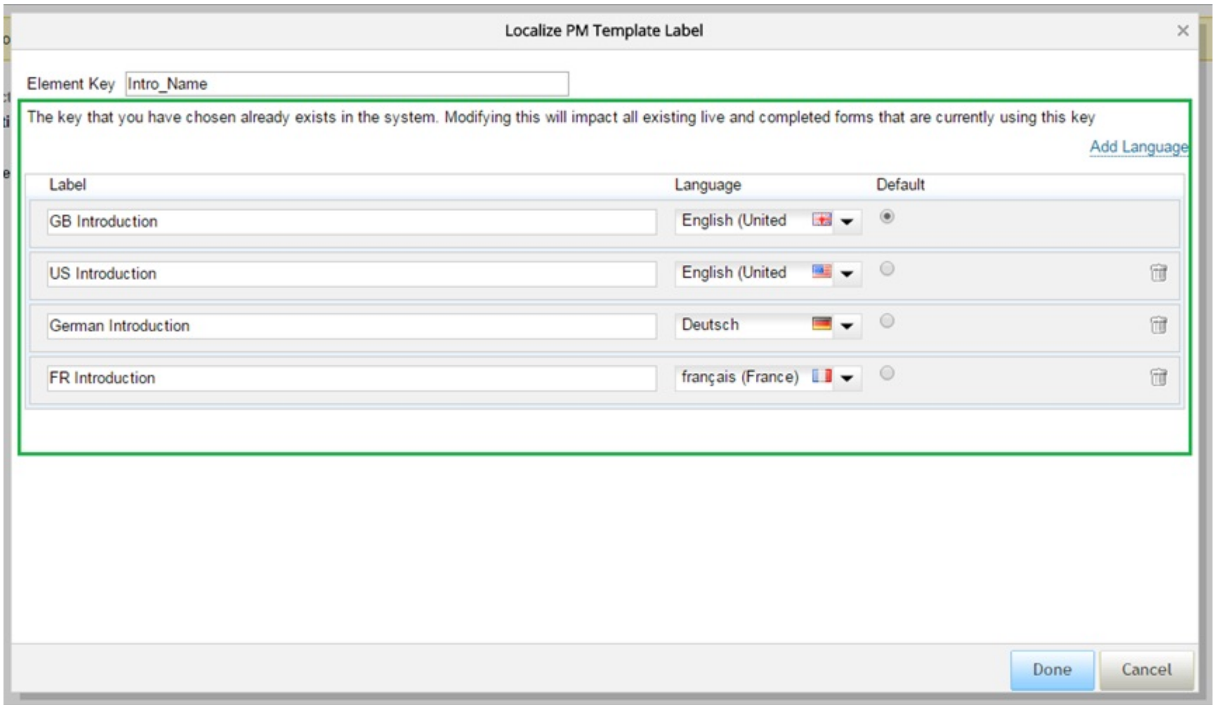
Procedure

1. Open the *Localize PM Template Label* dialog box.

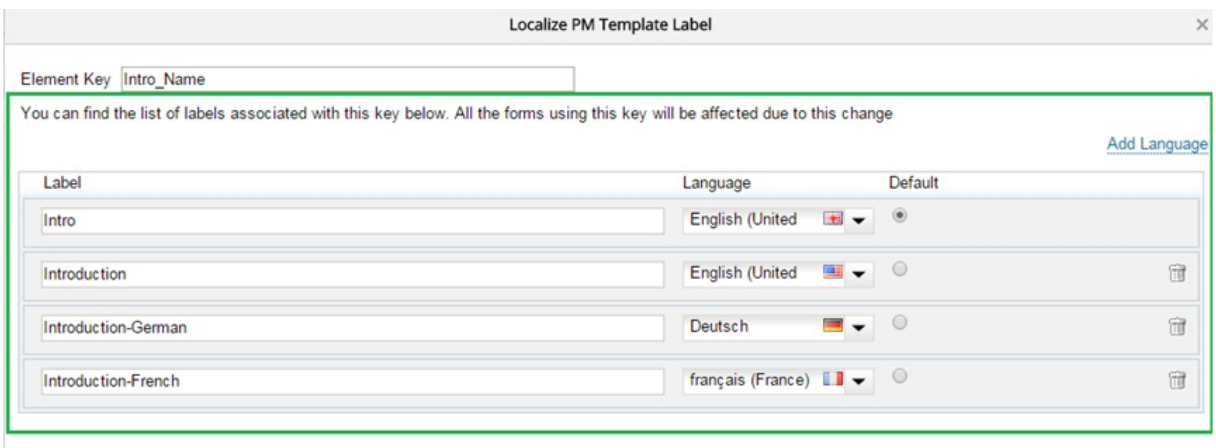


2. Type an element key (message key) in the *Element Key* box.
3. Click *Check*. The system checks to see if the ID already exists.
4. Select one of the following:
    - Use this message configuration, refresh : lets you apply the existing message key, with the configurations noted numerically, to the template label.
    - Update the configuration with the following configuration: lets you use the existing key with new labels

Existing message key applied



Existing message key applied to new labels



5. If the element key is new, select *Please click here to use this key* to confirm that you want to apply the new message key.
6. Click *Done*.

10.2.2 Form Template Settings

You can use the *Form Template Settings* page to configure the Administration settings before creating any forms based on your new template.

Click *Advanced Settings* in the *General Settings* section of the form template to open the *Managing Form Templates* page.

The following table describes the Administration settings you can configure for your Performance and 360 form template.

Setting	Description
Template Name	• the external name of your template • upon creation, forms will also include this name in the form title • template name can be changed at any time although not recommended • form data reporting is driven off external name not internal ID.
Template Type	• not editable, read only • type is set when form template is uploaded • form XML syntax identifies template type
Last Modified	• not editable, read only • identifies when the template was uploaded or last modified in Provisioning
Routing Map	• • route map must already be defined before it can be associated with a template that is, available for selection in the dropdown list determines the workflow or routing and stages of a form
Default Dates for Form Creation	determines the workflow or routing and stages of aSet the Default Start, End, and Due dates either Fixed or Relative to the: • Form Creation Date • Default Start Date • Default Due Date
Disable Ask for Feedback functionality	You can: • Disable the Ask for Feedback functionality by selecting this option • Select a date range for collecting feedback from employees If disabled, enter the date range for collecting feedback from employees.
Display circle icon as rating	The default rating icon is a star. By selecting this option you select a circle icon to display the rating.
Display check mark instead of rating in Team Overview	If enabled, check mark is displayed instead of rating in Team Overview. All scores recorded for the form are made visible to any use who has access to Team Overview. To hide any scores from users in Team Overview, you must select the check mark option.
Form Template for Last Competency Ratings	Choose the form template for Last Competency Ratings from the dropdown menu. Enabling this will enable the Last Ratings tab in competency sections. On this tab, the last official rating from a completed form of the specified form template for the competency will be displayed. It is important to note that this will only work if the competencies are the same and the previous form is completed. Form Tab Configuration and Visibility Control [page 366]
Default Due Date (in days)	• used to set the default due date of the form when the form is created • calculated based on form creation date + number of days specified

<table>
<tr><th>Setting</th><th>Description</th></tr>
<tr><td></td><td>emails are sent during off business hours, after midnight EST</td></tr>
<tr><td>Default Due Notification Date (in days)</td><td>used to set the default date upon which an e-mail notification is sent to the user who has the form in his/her Inbox that the form due date is approaching
calculated based on form due date- number of days specified
emails are sent during off business hours, after midnight EST</td></tr>
<tr><td>Default Late Notification Date (in days)</td><td>used to set the default date upon which an e-mail notification is sent to the user who has the form in his/her Inbox that the form is past due
calculated based on form due date + number of days specified
emails are sent during off business hours, after midnight EST</td></tr>
<tr><td>Template Status</td><td>choices are Enable or Disable
Enable – enables the form to be created by users assigned permission to create the form
Disable – prevents the form from being created; does not revoke the permission to create the form from users who were granted permission</td></tr>
<tr><td>Template Flag</td><td>choices are Public or Private
applicable to forms only, not notes
Public – forms are transferable whenever a manager-transfer process is started. For example, all public forms under the old manager are transferred to the new manager. Most forms are Public.
Private – forms are not transferred during the manager-transfer process. A Private form remains with the original manager, that is,. it will not be transferred with any public forms that are transferred to the new manager.
This flag has no impact on the route map and if there are any EM steps in the route map that have not yet been completed, these EM steps will reference and route the form to the new manager at that time.</td></tr>
<tr><td>Do Not Transfer Documents</td><td> If enabled, forms cannot be transferred . Setting this option disables all the options nested under this option. It means forms will not get transferred when the manager changes regardless of any other settings you have elsewhere. Note This is for current step only. Future steps will still show the new manager </td></tr>
<tr><td>Automatic Manager Transfer</td><td> Select... Automatic insertion of new manager as next document recipient if not already: This will automatically select the new manager as the recipient of the form if not already selected.
Automatic Inbox Document Transfer To New Manager: This will automatically transfer the form to the new manager's inbox
Automatic en route Document Transfer To New Manager: This form will get automatically forwarded to the new manager's for further action.
Automatic Completed Document Copy to New Manager: This will automatically copy the completed form to the new manager.</td></tr>
</table>

Setting	Description
	• Hide Visibility After Document Transfer: After the form gets transferred, the visibility of the form will be hidden from the old manager.
Do Not Trigger Change Engine	If enabled, you will not be allowed to define rules to handle form changes and form transfers, when the employee data changes.
Trigger Change Engine (for HR Rep. change)	If enabled, you can set the following rules to change and transfer forms: Document Changes • Auto complete old forms • Disable autosync in old forms Document Transfer • Keep forms with old HR Rep. • Send copy of a form to new HR Rep. on completion • Insert New HR Rep. as next document recipient if not already • Transfer documents in Inbox to new HR Rep. • Transfer documents in en route to new HR Rep. • Send copy of completed forms to new HR Rep.

When the system is configured to remove documents for inactive employees, apply these overrides so the system does not remove documents for this form template	• When an employee is set to inactive, this setting overrides the global setting that may remove inactive employee's documents. This setting may be useful when an employee is terminated yet still has an active form that entitles eligibility for incentive pay.
	  ○ Do Not Remove Inactive Employee's In-Progress Documents.
	  ○ Do Not Remove Inactive Employee's Completed Documents.

Default Targets	Choices are Self and Direct Reports, Self Only, or Direct Reports Only • Self and Direct Reports – enable the users to create a form for which their direct reports are the subjects • Self Only – enable the users to create a form for which they are the subjects • Direct Reports Only – enable the users to create a form for which one of his/her direct report is the subject • HR Reports Only- enables a user to create a form for which HR report is the subject • Self and Matrix Reports- enable the users to create a form for which their matrix reports are the subjects • Matrix Reports Only- enable the users to create a form for which one of their matrix reports is the subject **Note** The user creating the form is called the form originator. Also see the setting for *Allow form creator to select anyone as a subject*.
Hide Route Map on the Form	Hides the route map entirely on the form. The route map never appears to the end user.
Keep last touched version upon Document completion	If enabled, users will only be able to see the form up through the last step where they have made modifications.

Setting	Description
Enable Auto Logout at Session Timeout	If enabled, you will be automatically logged out of the system when the session gets timed out.
Enable Auto Restore Deleted Form When Importing User	• In the case of employees who've been deactivated and are reactivated, restores the most recent deleted for that employee when they are imported into the system. • Only forms that were in an in-progress state when deleted will be restored. Completed forms will not be restored. • If document transfer option is disabled, and the manager info has changed, the managers associated with the form at the time it was deleted will remain the same when the form is restored for the user • If the manager associated with the user has changed since the user was reactivated, the manager in the form will still remain the same as it was at the time the form was deleted. • If document transfer option is enabled, and the manager info has changed, the managers associated with the form at the time it was deleted In this case, we will first restore the In-Progress documents and then follow the rest of the document transfer rules. • If form was out for feedback when deleted, form will be restored to individual who the form was with
Enable Spell Check	• Enables spell checking for each form comment box • A Spell Check button will be available with each item • company must be provisioned with the spell checking feature
Enable Legal Scan	If enabled, the form is scanned for potentially improper or discriminatory language in comment sections of form.
Disable Spell Check on Route	If enabled, spell check is not performed on the form as it proceeds along the various steps.
Disable Legal Scan on Route	If enabled, legal scan is not performed on the form as it proceeds along the various steps.
Use Plain Text Only for Comments (Warning: You will lose RTE formatting in existing forms by enabling this.)	If enabled, plain text is to be used only for comments.
Bypass Draft Routing	No longer allows users to create a new form as a draft version (Draft Mode). When you select this option, users won't be able to edit the form before routing it to others for evaluation. This change applies to newly created forms only, it doesn't affect existing forms.
Enable Writing Assistant	• displays a writing assistant hyperlink for each form comment box that provides context sensitive assistance to the form's content • company must be provisioned with the writing assistant feature
Disable Ask for Comment Routing	• disables the comment option when using Get Feedback.
Disable Ask for Edit Routing	• disables the edit functionality when using Get Feedback
Allow Add Approver/Evaluator buttons or disable	• This setting enables users to add approvers to the route map via route map actions.
Hide Add Signer buttons	• Prevents users from adding signers

Setting	Description
Disable All Toolbar Buttons (overrides all button selections below)	If enabled, hides all of the icons, and actions and history drop-downs at the top of the page.
Disable Print Button	If enabled, it hides the Print button.
Disable Send and Open Next Form Button	If enabled, it hides Send and Open Next Form button at the bottom of the Performance Form.
Disable Page Setup button	• Not applicable to Performance Management v12Acceleration.
Disable Delete button	If enabled, hides the Delete action from the Actions menu on the Performance Form. Note the ability to delete forms is available to only form originators and the manager of the form subject
Disable Note button	• If enabled, hides Notes information from the Supporting Information pod.
Disable Form button	If enabled, hides the Performance Forms selection from the History dropdown.
Disable 360 button	If enabled, hides the 360 Forms selection from the History dropdown.
Disable Info button	If enabled, it hides the document information that would otherwise be viewable in a pop-up window. Note The document info button displays info about the routing – who has handled the document in the past (and when they sent it to the next person), where it will go in the future.
Disable Download button	Note This option is available only for PM v11 forms, not for PM v12 Acceleration forms.
Disable Send button	• prevents users from being able to send a form • disabling the Send button will keep the form in the Inbox unless the form can be deleted or until the Send button is enabled to send the form onto Completion
Disable Send button for completed documents	If enabled, Send button for completed forms is disabled.
Disable Late Notification	• suppresses e-mail notifications informing users when a form is late • turns off the notification for the form only and not for other forms that are enabled in the instance
Disable Due Notification	• suppresses e-mail notifications informing users when a form is due • turns off the notification for the form only and not for other forms that are enabled in the instance

Setting	Description
Disable Step Exit Notification	• suppresses e-mail notifications informing users when a routing step has been completed, that is, when a form moves from one workflow stage to another • turns off the notification for the form only and not for other forms that are enabled in the instance
Enable Custom Layout Printing	Links to a page where you set parameters for custom layout Configuring Custom Print [page 364]
Disable PDF printing	If enabled, hides the PDF icon at the top of the Performance form
*Allow form creator to select anyone as a subject	• allows users to select a form subject outside of self or direct reports • a "Find User" search box will appear in the New Document wizard
Allow Matrix Manager to Delete document if Delete button is available	If enabled, the matrix manager is allowed to delete the form if the Delete button is available.
Show Signoff routing step names in Signoff Stage	If enabled, the Signoff routing step names are displayed in Signoff Stage.
Display Stop Start Date	If enabled, the Stop Start Date of the form is displayed.
Enable form title editability in the Form	When this option is enabled, the form title becomes decoupled from the template's name. This has the following results: • The form title will be the name of the template's name in the subject's language at the time of form launch. • The form title will no longer be affected by changes to the template's name. • The form title will no longer be sensitive to the logged-in user's language settings. The form will have only one title for all languages. If this setting is disabled, the title of all launched forms will automatically update to match the form's current name, and the original name will be lost.
Enable form title editability in Form info page	Both "Enable form title editability in the Form (V10)" and "Enable form title editability in Form info page (V10)" behaves in the same manner. However, when this setting is enabled you can edit the form's title in the Form Information Page. Editing the form's title in the form itself was supported in Performance Management v11, but is not supported in Performance Management v12 Acceleration, and so "Enable form title editability in Form info page (V10)" has no effect on the form title's editability.
Enable Completed Form Item Comment Copy	If enabled, the completed form item comment can be copied.
Only create for users who don't have ...	Prevents the form from being launched for users who already have the form in the specified parameters.
Automatic create form upon completion. Any date error	If enabled, the form gets automatically created after completion.

Setting	Description
will result setting end and due date to 90 days after start date.	**Note** Any date error will result setting end and due date to 90 days after start date.
Hide the Export and Export (Compact) buttons for documents in the Completed Folder.	If enabled, the Export and Export (Compact) buttons for forms are hidden in the Completed Folder.
Show digital signatures in Document Print Preview.	If enabled, digital signatures are displayed in the document print preview.
Select Add Signers UI/	Select one of the following: • v1 - Adding signers is allowed only during Modification stage • v2 - Allows adding signers during Modification and Signature stages
Disable Due Date Validation	Disables the validation by which the form is checked to make sure the end date is before or the same as the due date. By default, this setting is not selected, therefore the form is checked for validation.
Disallow users from changing the Start Date	If enabled, prevents users from changing the Start Date on the Performance Form
Disallow users from changing the End Date	If enabled, prevents users from changing the End Date on the Performance form.
Disallow users from changing the Due Date	If enabled, prevents users from changing the Due Date on the Performance form.
Enable form routing to previous step	If enabled, allows users to send the form to the previous step in the route map.
Enable SMART Goal Wizard (requires SMART Goal Wizard enabled on goal plan)	If enabled, the SMART Goal Wizard is enabled on the goal plan.
Show Manager Rating first for EZ Rater mode	If enabled, the manager's rating appears first in the EZ Rater mode.
Prevent forms from being created with overlapping date ranges	If enabled, prevents users or admins from creating forms that have date ranges which overlap. **Note** This setting checks the dates on all forms which are launched and have this setting enabled.

Setting	Description
Enforce permissioning for Detailed Document Search & Archive & Print Reporting	If enabled, this option controls the form to be included in the Detailed Document Search and Archive and Print reports. By default, Detailed Document Search disregards permissions and includes all fields, however, an administrator can require DDS to obey permissions when displaying fields by selecting the Enforce permissioning for Detailed Document Search & Archive & Print Reporting option.
Allow exit step comments to be visible to all participants in a Collaborative (C) Step	If enabled, exit step comments are visible to all the participants in a Collaborative (C) Step. Only applicable for forms that have not progressed beyond the C Step.
Enable attachments	If enabled, allows users to upload attachments in the Supporting Information pod.
Disable Table of Contents	If enabled, hides the table of contents or form navigation at the top of the Performance form.
Define the PDF file name format:	• Form Title and Creation ID • Custom
Enable Achievements tab in Performance Goal Section	If enabled, Achievements tab will be visible for all users in Performance Goal Section.
Display Achievement Feedback for Performance Goal Achievements	If enabled, you can view the Feedback provided on Continuous Performance Management (Performance Goal) Achievements under Achievements tab.
Enable Achievements tab in Performance Development Goal Section	If enabled, Achievements tab will be visible for all users in Development Goal Section.
Display Achievement Feedback for Development Goal Achievements	If enabled, you can view the Feedback provided on Continuous Performance Management (Development Goal)Achievements under Achievements tab.

10.2.3 Enabling Ask for Feedback

Ask for Feedback allows managers to be ask other employees for feedback on the person being rated.

Context

To enable *Ask for Feedback*, you need to enter date ranges in the *Advanced settings* of the *General Settings* when you create a form template.

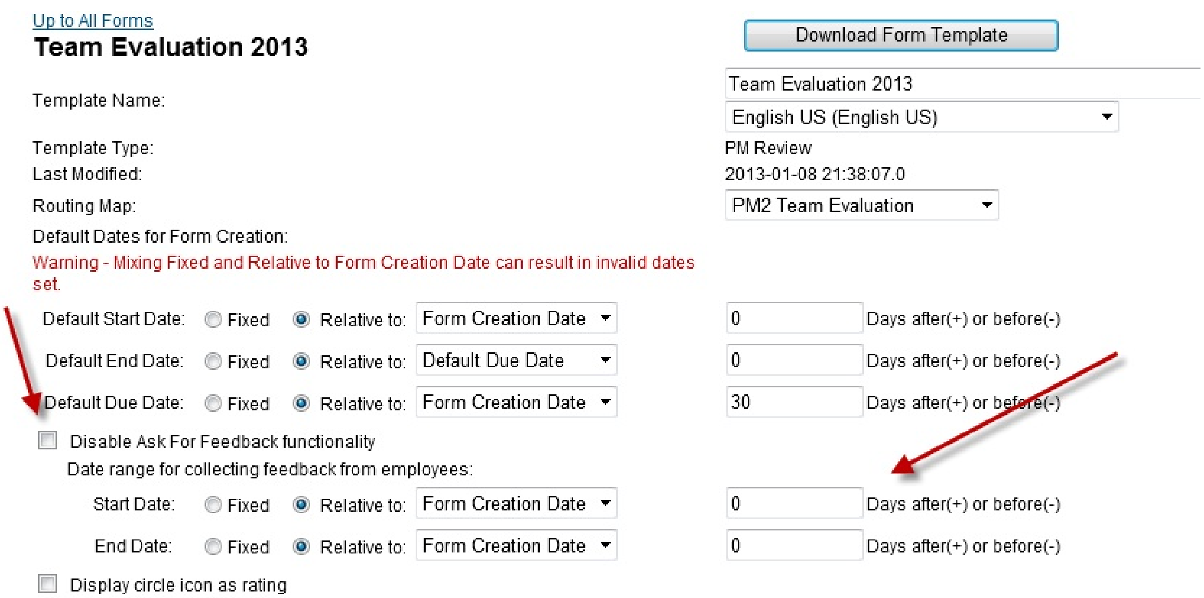
Procedure

1. Under *Managing Form Templates* select the template that you for which you want to enable Ask for Feedback.
2. Select the Default Start, End, and Due dates during which managers can request and people can respond with feedback. The dates can be

If you select...	Then do this...
Fixed	Enter the date
Relative	Select the type of relative date and enter a date range

The relative dates can be set relative to the form creation date or the default start, end, or due dates.

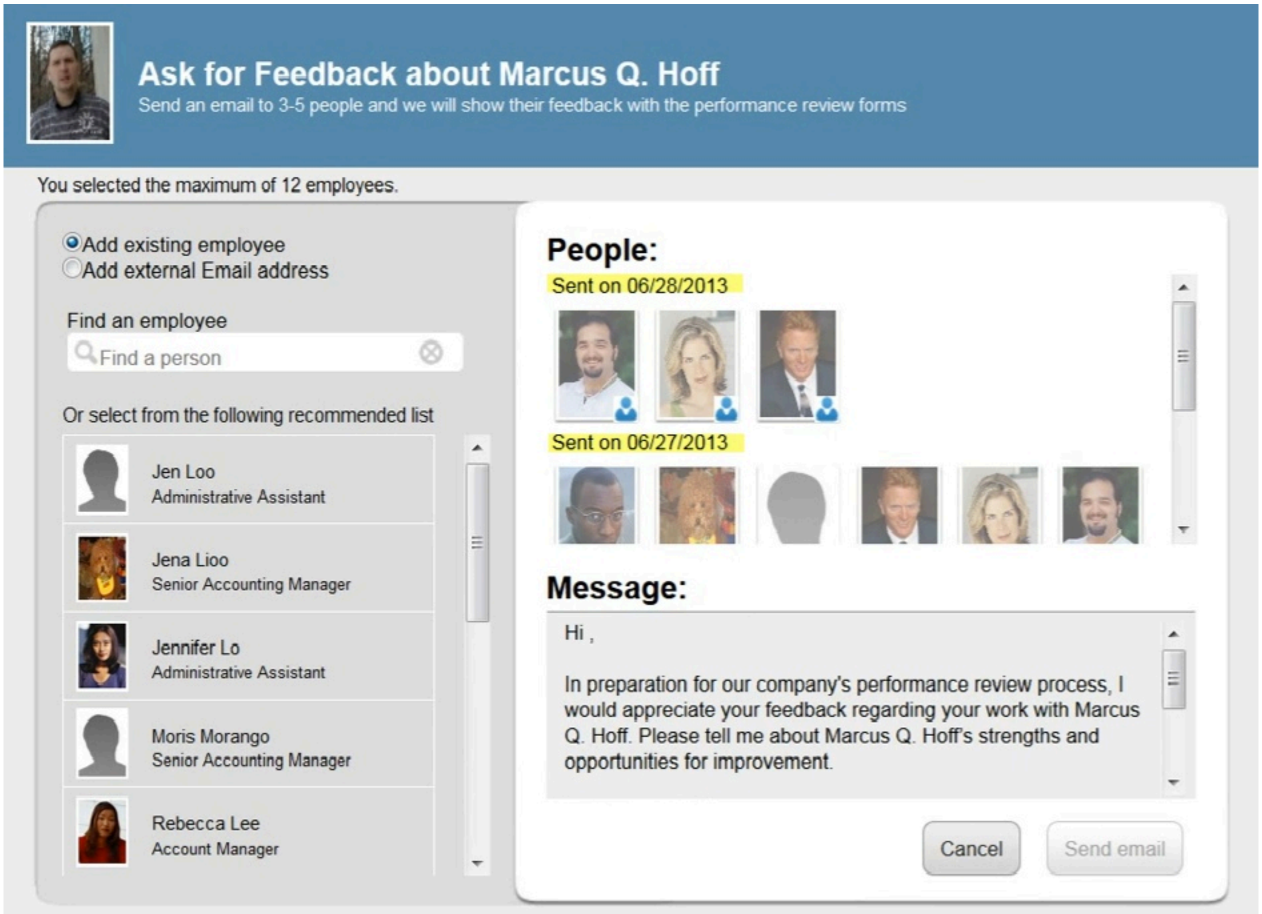
> **Note**
>
> Do not select *Disable Ask for Feedback*.

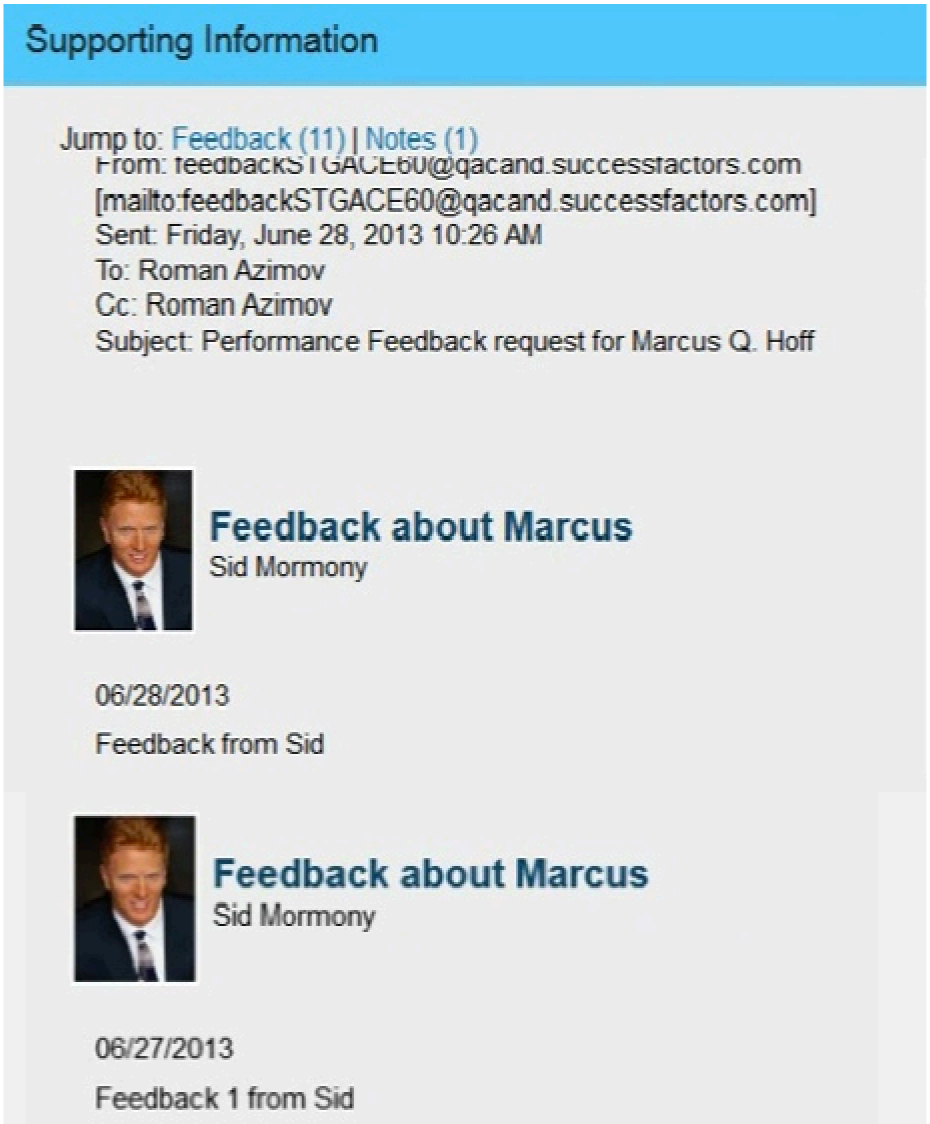


Ask for Feedback now supports multiple, discrete requests for feedback from the same user, as long as the feedback requests are made on different days.

Results

This is an example of Ask for Feedback:


Ask for Feedback about Marcus Q. Hoff
Send an email to 3-5 people and we will show their feedback with the performance review forms
You selected the maximum of 12 employees.
Add existing employee
Add external Email address
Find an employee
Find a person
Or select from the following recommended list
Jen Loo
Administrative Assistant
Jena Lioo
Senior Accounting Manager
Jennifer Lo
Administrative Assistant
Moris Morango
Senior Accounting Manager
Rebecca Lee
Account Manager
People:
Sent on 06/28/2013
Sent on 06/27/2013
Message:
Hi ,
In preparation for our company's performance review process, I would appreciate your feedback regarding your work with Marcus Q. Hoff. Please tell me about Marcus Q. Hoff's strengths and opportunities for improvement.
Cancel
Send email



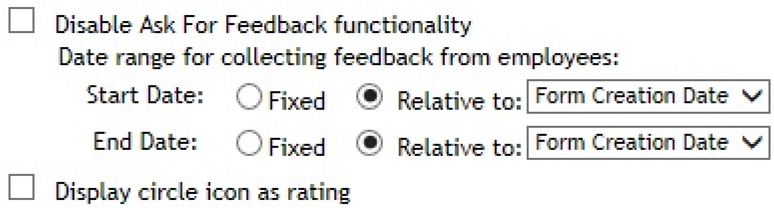
10.2.4 Enabling the Circle Rating Option

The default icon in a rating scale is the star. If you want to use a circle instead of a star, you need to select that option in the *Advanced Options* of the *General Settings*.

Procedure

1. Select *Display circle icon as rating* if you prefer to use circle icons instead of stars.

2. When you have completed selecting your advanced options, click *Update Form Template* at the bottom of the page.

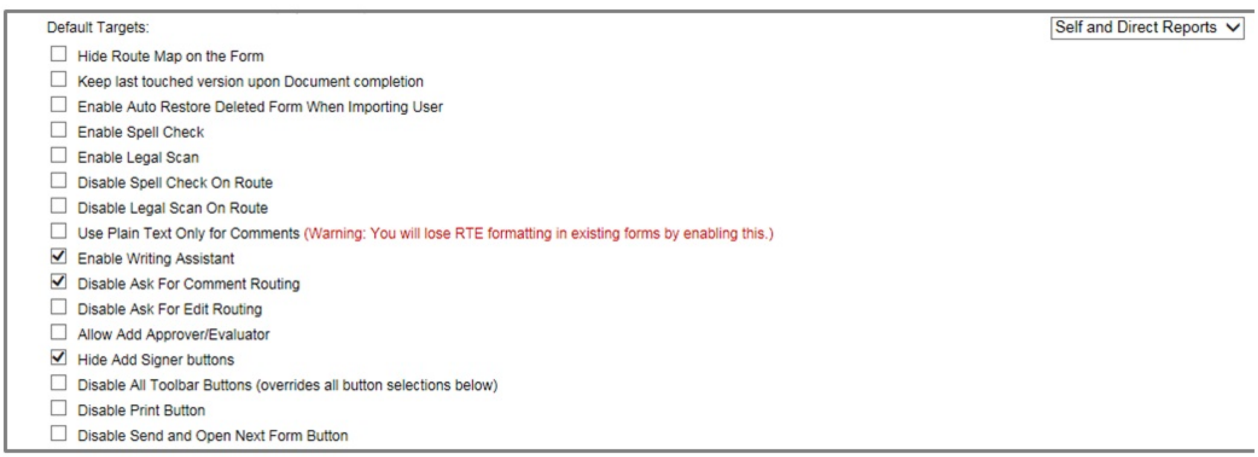


10.2.5 Plain Text vs Rich Text Editing

Performance Management v12 Acceleration supports the configuration of comments and custom text fields to use plain text instead of rich text.

Because rich text editing (RTE) includes HTML tags, which are included in the character count, you may prefer that character limits reflect the true character count without HTML tags.

To enable the use of plain text only for comments, select this option via the *General Settings > Advanced Settings* when creating a form template or via *Admin Center > Manage Templates* when modifying a template.



10.2.6 General Settings - Advanced Options

Access the advanced options by clicking the *Show advanced options* link in the *General Settings* page.

Route Map Options

In this section you can enable the:

- *Send to Previous Step* button
  Delete button for specified roles and steps

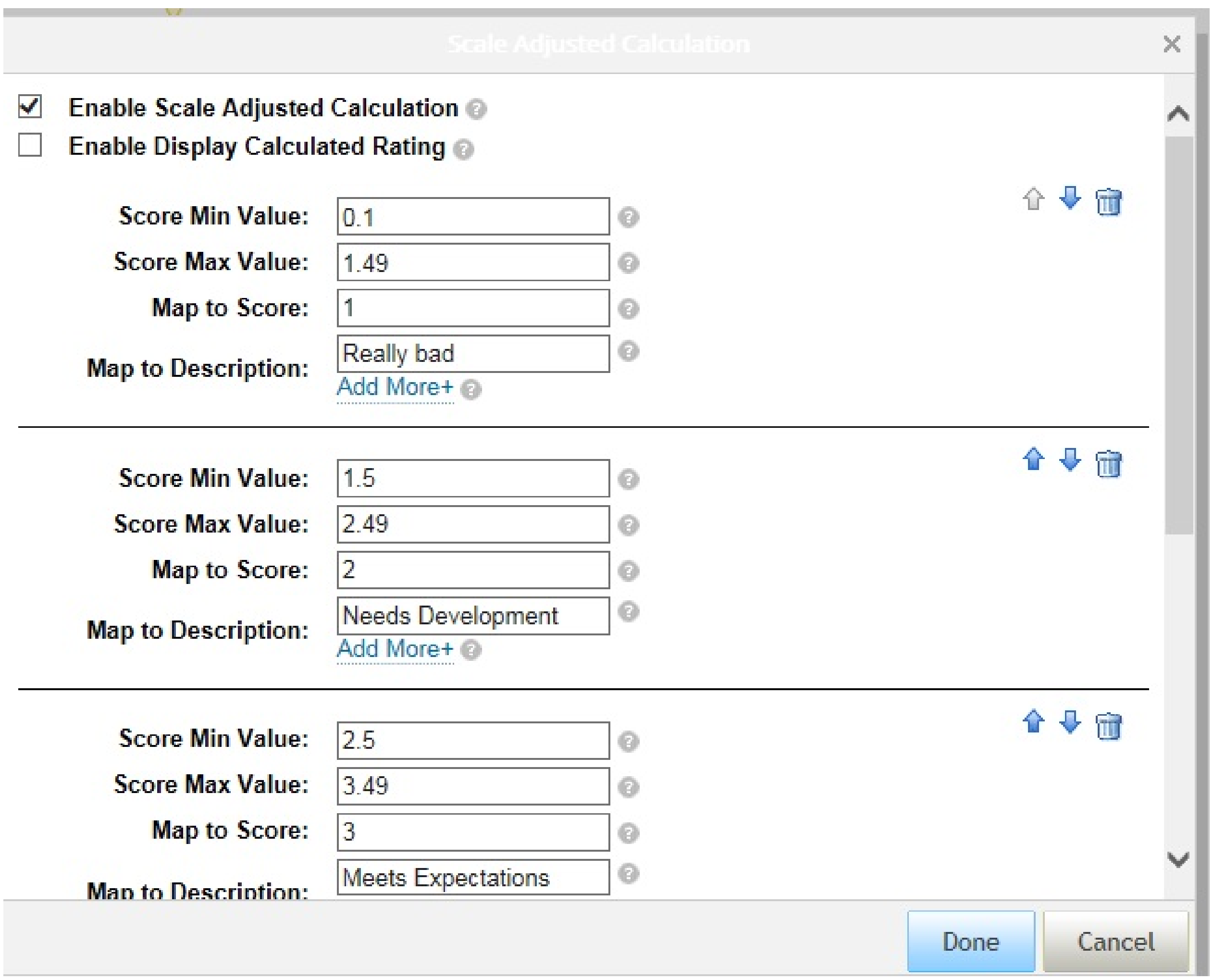
Scale Adjusted Calculation

Adjusted rating scales allow you to control the calculation or display of ratings. You can use an adjusted scale to show only the label of a calculated score. For example, instead of displaying a scale that rates from 1 to 5, you want the ratings to display:

- Unsatisfactory
- Needs improvement
- Satisfactory
- Meets Expectations
- Exceeds Expectations

In this case, use the scale adjusted calculation to map values to a score. You can map values up or down depending on your company policy by setting a minimum and a maximum value to map to a score. Performance Management maps the values to the score, maps the score, and then displays the description as the rating.

In this example maximum scores are mapped down: a score of 1.49 is mapped down to 1, 2.49 is mapped down to 2, 3.49 is mapped down to 3, and so on.



If you want to allow users to view the calculated rating value, select *Enable Display Calculated Rating*.

Button Permissions

When you select the *Enable Previous Step Button* option you insert a *Previous Step* button into the form, which allows the form to be sent to the previous step for specified roles and steps.

When you select *Enable Delete Button*, you enable the *Delete* button for specific roles and steps.

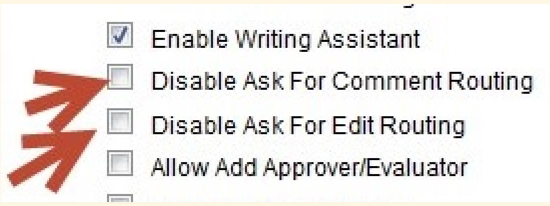
The *Previous Step* and *Delete* buttons are controlled by button permissions as well as form template settings. By default, 3 button permissions are defined. Click the link to modify the permissions.

There are two types of access:

- *None*: the user cannot see the button
- *Enabled*: the user can see and click the button

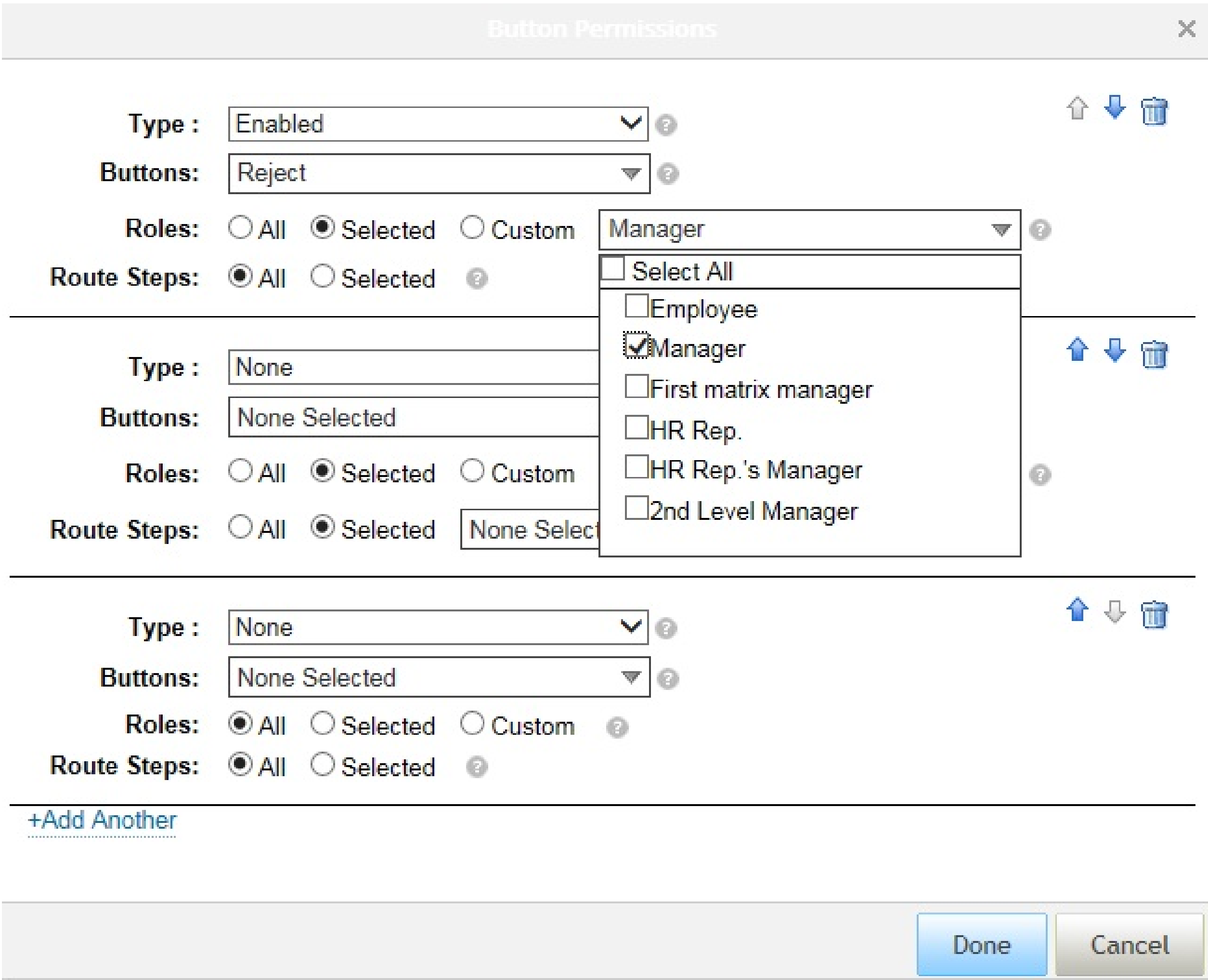
The buttons for which the permission is applicable can be:

- Reject- sends the form from a signature step to the last modify step.
- Finalize form - allows a user to send the form to the next step in the route map. This is best configured through the route map than in button permissions.
- Sign - in the signature stage
- Overall Score
- Gap analysis - shows where the employee has rated himself higher or lower than the manager's rating
- Incomplete Items - highlights a number of required fields that have not been completed. We recommend hiding this pod if there are no fields required at a certain step.
- Team Ranker - shows where this employee ranks when compared to peers who have been evaluated with the same form template. We recommend turning this pod off when manual ratings are used.
- Supporting Information - this pod displays responses from the:
  - Ask for Feedback tool: All responses from the current form; feedback responses are not visible to employee
  - Notes from the Employee Profile Notes: All notes retrieved from the Notes service with a max count limit of 1000 but there isn't any filter on date range.
  - Attachments: Includes the ability to upload an attachment and download attachments which have been added to the form.
- Send to Previous Step - gives the user permission to send the form to the step prior to the current step.
- Delete Form - grants permission to the *Delete* button. This is also controlled through *Form Template Settings*.
- Get Comments - enabled the *Get Feedback* button that button allows you to get feedback from a particular set of roles in selected route steps.
- Get Edits - when enabled, the *Get Feedback* button permits comments from a particular set of roles in selected route steps.

> **Note**
>
> The *Get Feedback* button can be hidden from all users by checking the appropriate boxes via *Form Template Settings > Managing Form Templates* in the Admin Center.
>
> 
>

The *Roles* for which you set the button permissions are based on the route map that is associated with the template. You can select all roles, specific roles from the template, or custom roles that you define.

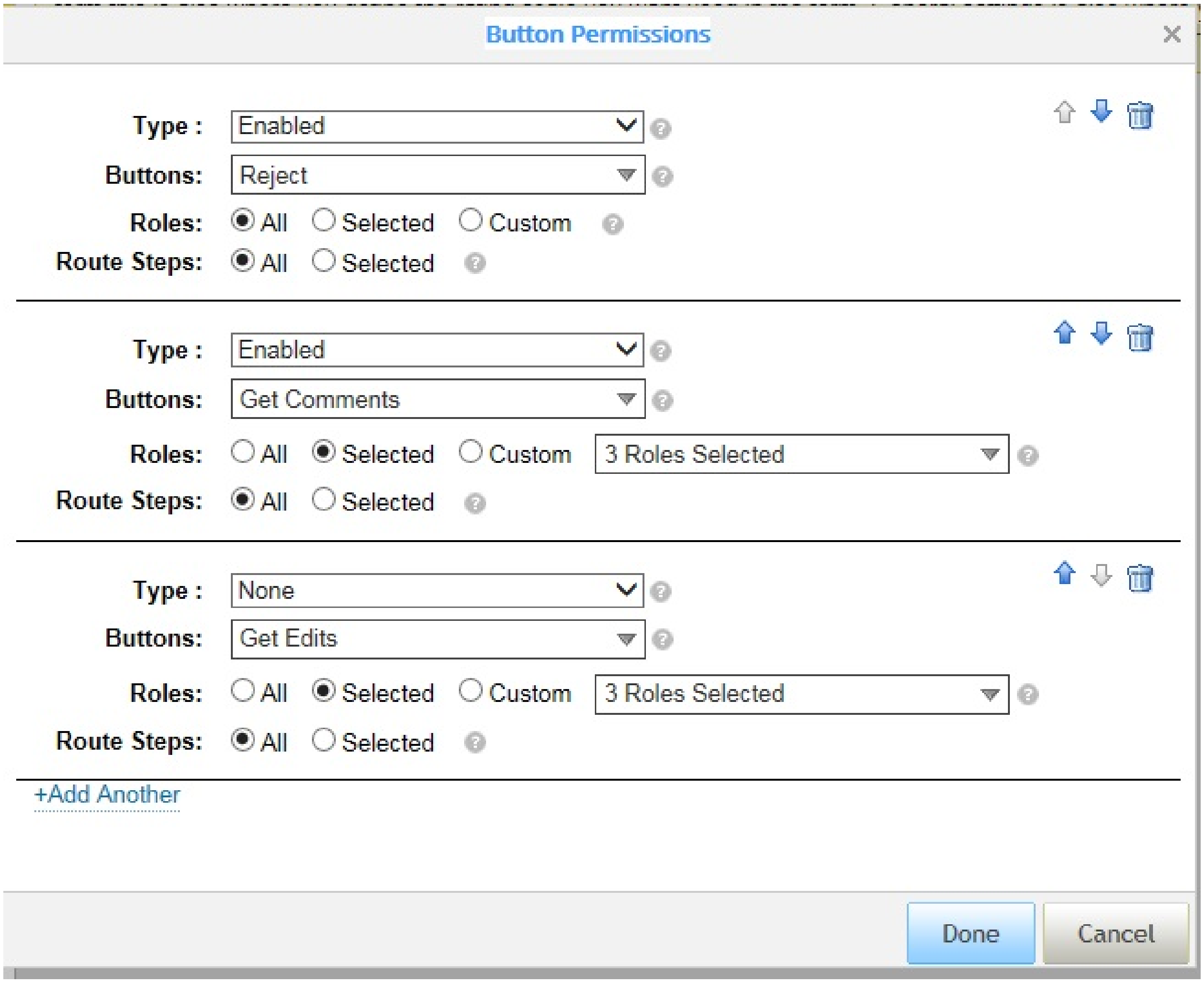
In this example, the *Reject* button is enabled for the manager.



Route Steps come from the route map attached to the template. You can enable buttons for all steps in the route map or you can select specific route steps from the list.

By using roles and route steps you can set permissions granularly.

In this example, *Get Comments* and *Get Edits* are enabled, which means that the *Get Feedback* button is enabled for both comments and edits by three roles in all route steps.



Other's Rating Tab Permissions

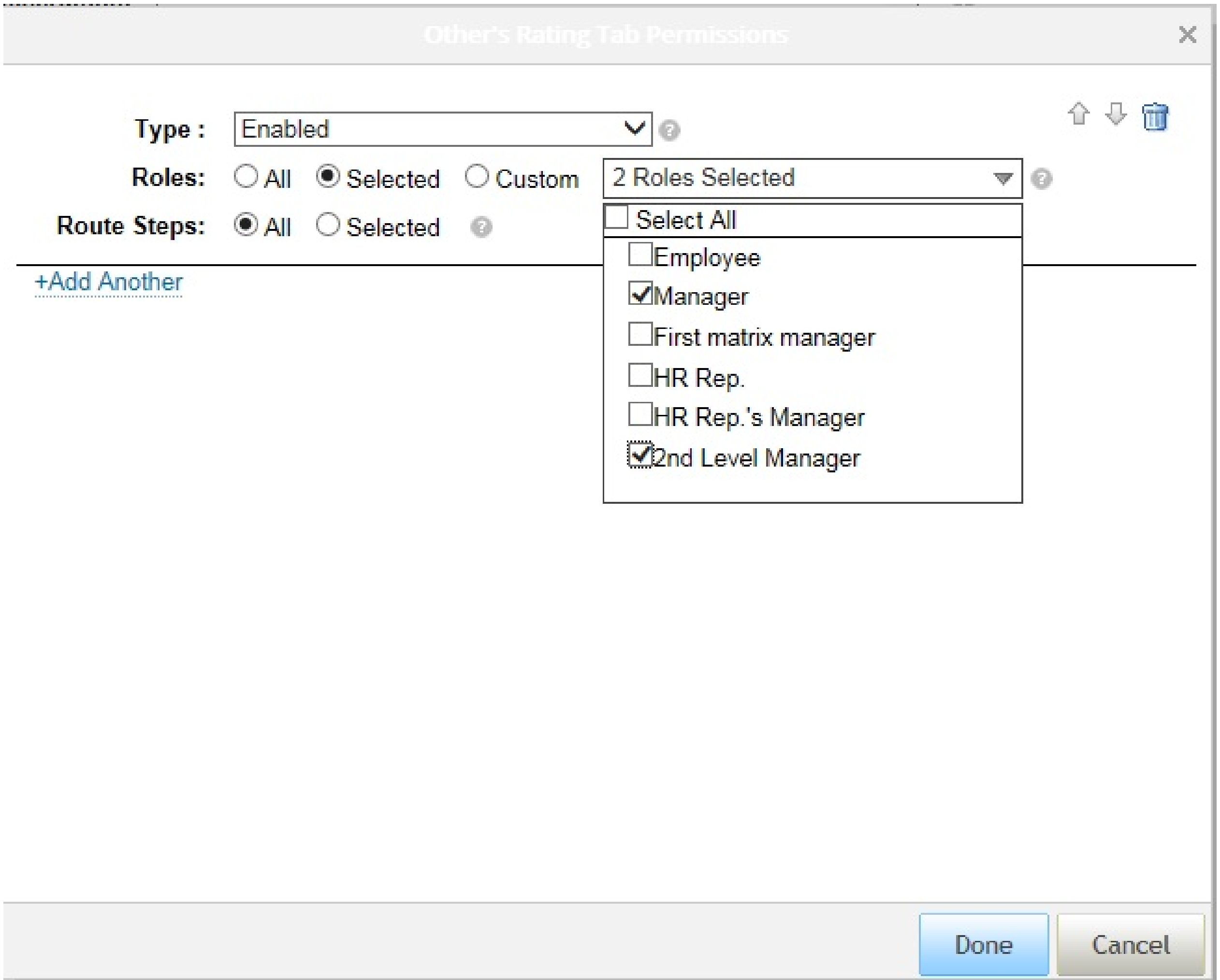
The *Other's Rating* tab applies to the entire form. In *Performance Management v12 Acceleration*, you can always see the ratings of the logged-in user. Everyone other than the logged-in user is under Other's Ratings. The manager can see the employee's ratings as well as his or her own ratings. The manager can also see the ratings of other raters, such as a matrix manager or an HR manager, under the *Other's Ratings* tab. The logged-in user's ratings are on the left and other ratings are on the right.

This behavior is different from that of Performance Management v11 where it is customary to have only two rating fields with other roles rating into one data field. The route map determines which role has the final say. The only way to view a specific user's rating after it has been changed is to look at the audit trail.

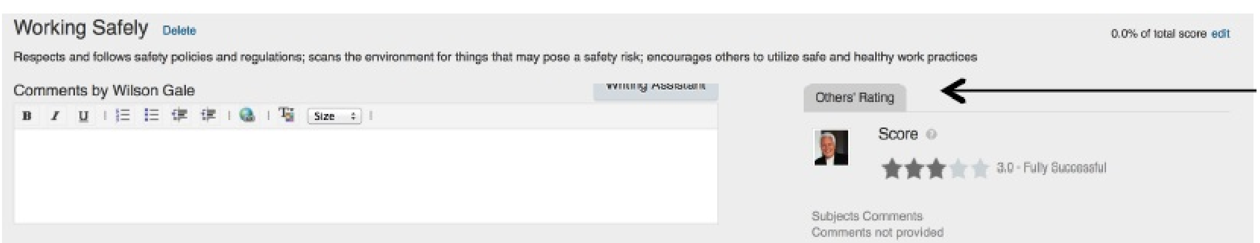
Note

There is a difference between the Performance Management v12 and how Performance Management v12 Acceleration displays Others Ratings.

Performance Management v12 Acceleration takes a snapshot of each individual rating and stores it in the *Other's Ratings* tab. You can choose to hide or display this tab. When you enable the *Other's Ratings* tab you allow the selected roles to view ratings and comments made by other roles. In this example, the tab is enabled for the employee's manager and 2nd level manager for all route steps.



The *Other's Rating* tab is shown here:



10.3 Fields and Sections

After you have defined the general settings you need to edit the other fields and sections in the form.

Under *Edit Fields and Sections* you define more detailed settings for your form templates. As with the General Settings, the various sections also contain advanced options that are discussed in this chapter.

Form Sections

Form Section	Comments
Employee Information	Displays basic employee data for the individual you are reviewing, the subject of the form. You can rename the section and include or exclude various fields to show more or less information about the employee.
Section weights	Each of the Goals and Competencies sections on the form must have a weight. This weight is used in the overall performance form score calculation. For example, you may set the weight of the Goals section as 30% and the weight of the Competencies section as 70%, or you may set these sections as 50/50. The calculated overall rating takes this into consideration.
Goals	On a performance form: • Performance Goals can be automatically populated into the form from the goal plan of the employee, or added manually. • Development Goals can be added to assist in planning for the upcoming year.
Competencies	The basic abilities needed by employees to perform their role within the organization successfully. Including core competencies in the review reinforces their importance to all employees and signals what is expected of them. Competencies can be automatically populated into the form or added manually.
Summary	Displays summarized information from the goal and/or competency sections on the form in one central area. The amount of summarized information is determined by the content in the working sections of the form as well as form configurations. For example, if your form includes ratings and weights, the average score from these values is shown for each section, as well as a general overall performance score.
Signature	Displays the names of the people who will sign the form and, once signed, displays the signature of the signer and the date signed.

Parent topic: Configuring Templates Using Admin Center [page 108]

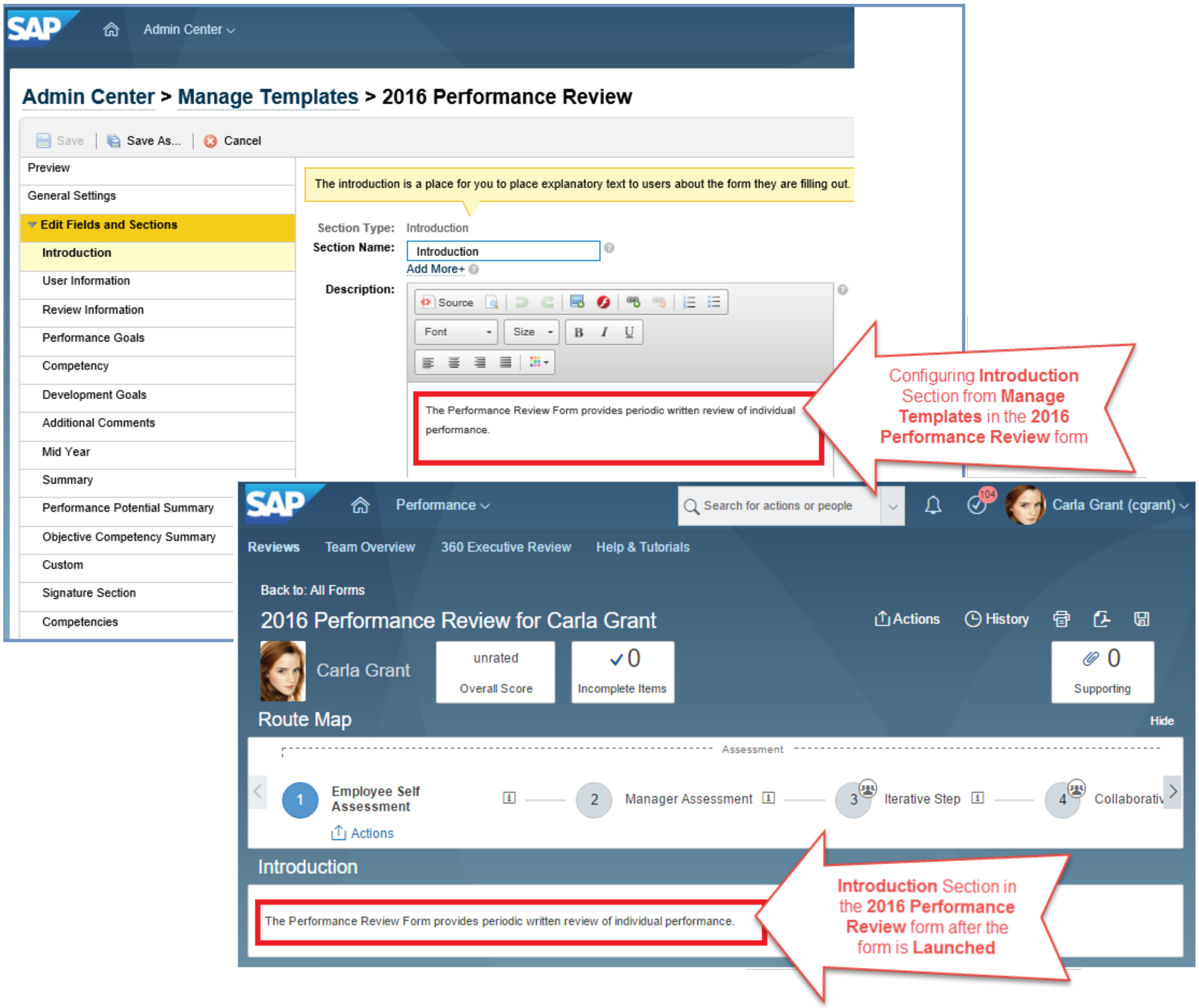
Related Information

Managing Templates [page 108]
Configuring the Template: General Settings [page 110]
Rating Options [page 156]
Configuring Desired Field and Section Permissions: Advanced Options [page 165]
Configuring Custom Roles Using Manage Templates [page 167]

10.3.1 Introduction

The introduction section displays the kind of form the users are about to fill out.

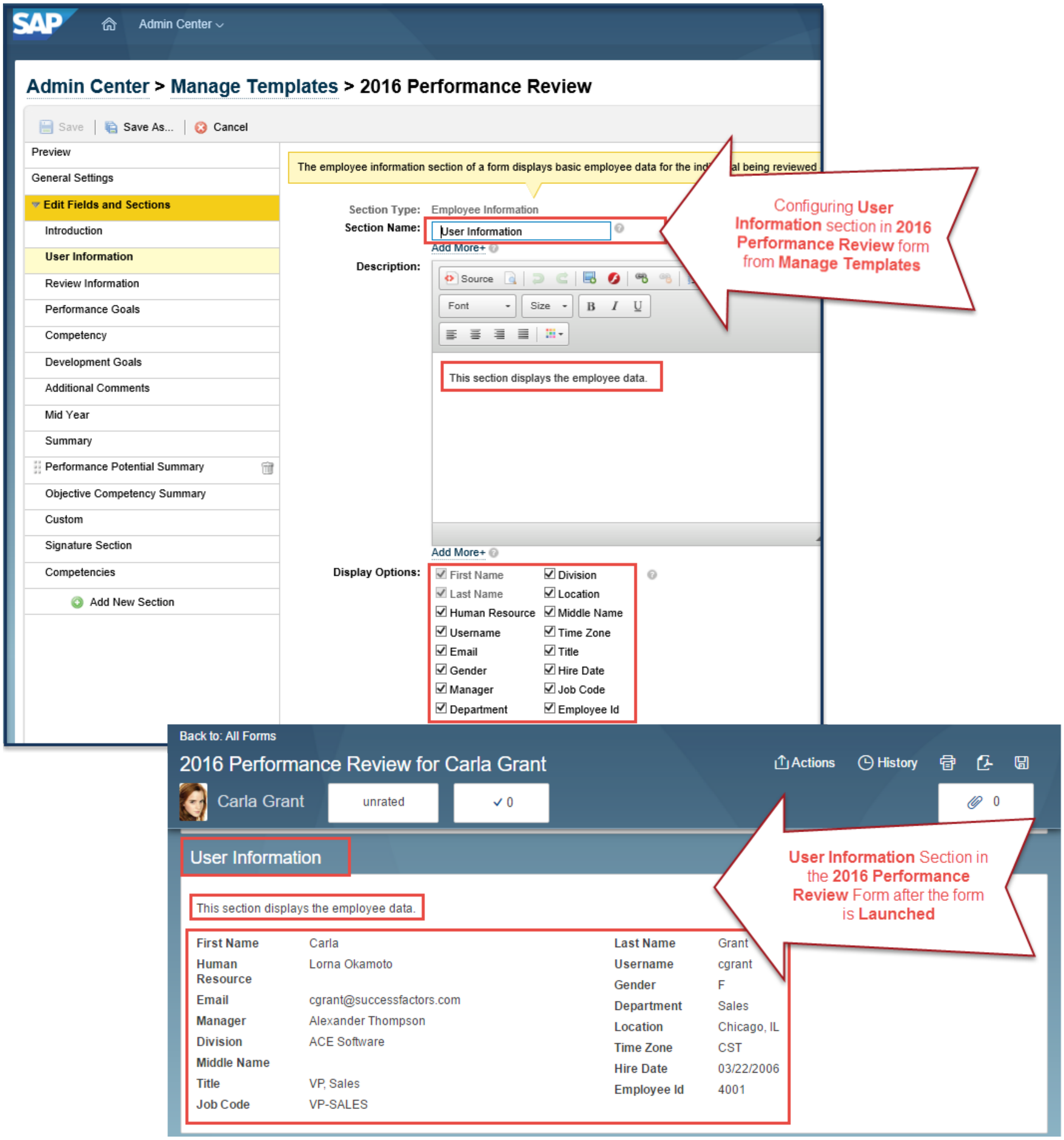
In this section you can place an explanatory text about the form.



10.3.2 User Information

The User Information section displays basic employee data for the individual being reviewed.

You can rename the section and include or exclude various fields to show more or less information about the employee.



The section name and description are mandatory whereas other display information is optional:

- First and Last names - sometimes mandatory
- Human Resource
- User name
- E-mail address
- Manager
- Gender
- Department
- Division

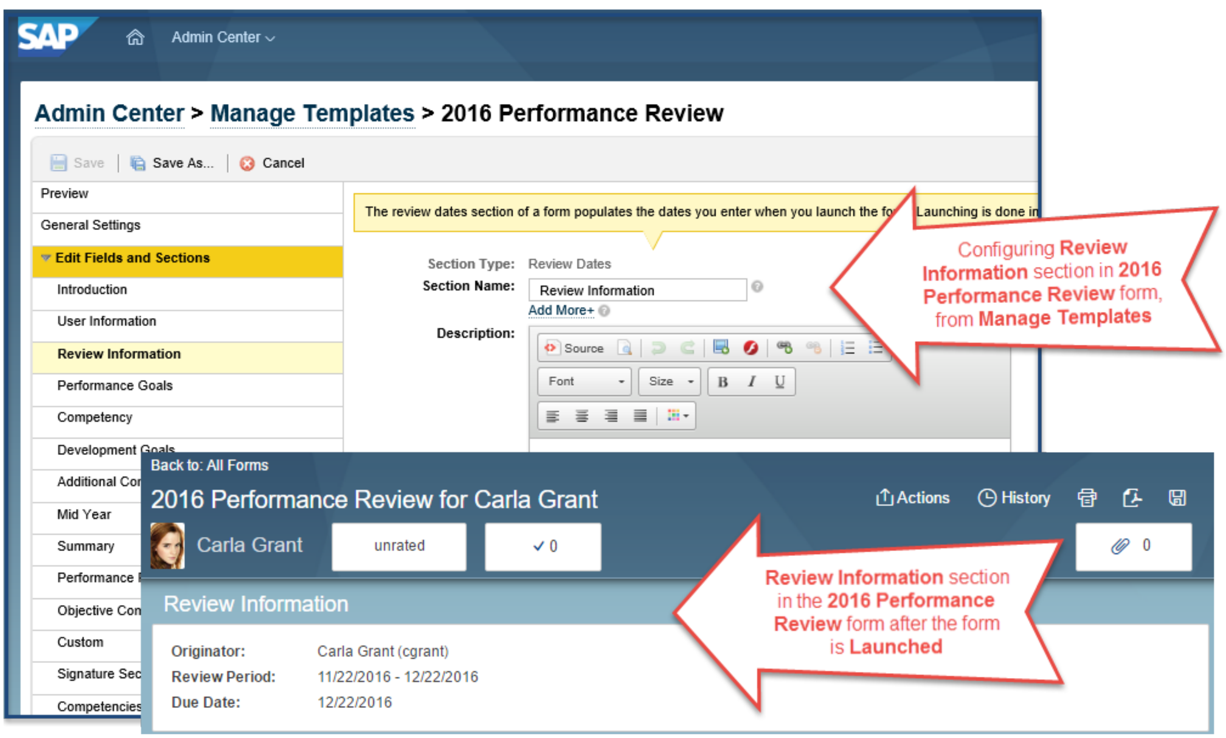
- Location
- Middle Name
- Time Zone
- Title
- Hire Date
- Job Code
- Employee Id

In the advanced options, you can choose to show or hide the *Employee Information* section to selected roles along selected steps of the route map.

10.3.3 Review Dates

The Review Information section displays dates of a review form.

The review dates section of a form populates the dates you enter when you launch the form. In the advanced options, you can choose to show or hide this section to selected roles. There are section permissions to hide or show the section by user role and route map step.



10.3.4 Performance Goals

The goal section is where you see, rate, and comment on how an employee has achieved his or her performance goals.

Along with the name and the description, you need to select a section type:

If you select	Then choose the
Objective Section	Objective plan that you want to link to the form
Individual Development Plan Section	Development plan you want to link to the form

You can also choose to allow users to add existing objectives to the form from the objective play by selecting *Show Add Existing Development Objective Button*.

Note

This button is not needed if goals are synced to the form automatically.

The *Unable to Rate* field is where you type a label that explains the reason an employee cannot be rated. This appears with the rating scale but does not impact the overall rating. Some examples of a label are *Not Applicable* or *Too New to Rate*.

10.3.4.1 Performance Goals: Advanced Options

In Performance Management v12 Acceleration, the rating of record is stored in a separate data field from the rating considered to be a user's personal rating.

The configuration of who has influence over the final rating form has two layers. These layers are the selected *Rating Option* with, in some cases, the addition of *Field Permissions*

Option	Selection	Result
Include the ability to rate	Not selected	No ratings
Include the ability to rate	Everyone has their own rating box for each item *and* The final score is the EM's rating	The final score is the EM's rating
Include the ability to rate	Everyone has their own rating box for each item *and* The final score can be granted to any role by permission.	Everyone has a rating box and sees his or her own rating box. The final score can be granted to any role by field permission.
Include the ability to rate	Everyone shares one rating box for each item	The form has only rating box for each item and you can set permissions to determine which role can make the rating. It there are permissions for more than one role, the last rating entered is the final score.

Option	Selection	Result
Include the ability to rate	Everyone shares one rating box for each item *and* Except the employee who has a self-assessment rating box	The form has a self-assessment box for the employee, plus a single rating box for which you can set permissions by role, and which becomes the final score.
Exclude Private Goals	Selected	When this feature is enabled, the private goals are excluded from the form when the form is being created. Also, you will not be able to add a new private objective to the form. This is used only in PMv12 Acceleration. **Note** Exclude Private Goals function only works when launching a form. **Caution** If you have enabled*Exclude Private Goals* when creating a form, and change the public goals in the form to private goals after launching the form, the goals will still appear on the form. This is because you have set the goals to public while creating the form.
Include the ability to enter a weight	Selected	Allow users to change the weight of a goal or competency on the Performance Management form. This sometimes changes the weight in the goal plan, depending on configurations for the synchronization of the Performance Management form and goal plan.
Include a comment for each item	Selected	Enable users to comment on each goal or competency item in the form. If not checked, no comment box is displayed.
Include an overall comment	Selected	Include a section-level comment
Display the section in the summary	Selected	Display ratings and weights from this section in the summary section
Display calculated section rating	Selected	Display the calculated rating for this section in the summary.
Auto populate objective weights from weights in the objective plan	Selected	Bring the weights from the goal plan into the Performance Management form.
Allow users to add/remove Objectives within the section	Selected	You choose to allow users to add or remove objectives. You need to configure action permissions.

Option	Selection	Result
Avoid Objective Plan State Change by Multiple Forms	Selected	If goal plan is locked in the goals module, it cannot be modified in Performance Management.
Synchronize objectives from an objective plan and a review form	Selected	Changes made to goal plan in the Goals module auto-synch to the goal section of the Performance Management form. Changes to goals on a Performance Management form auto-synch to the goal plan in the Goals module.
Use Metric Lookup Table Rating	Selected	If goal plan has a metric lookup table. This option is selected by default.
Include in overall Objective/Competency rating calculation	Selected	Lets you do a calculated rating over the goal sections. This is particularly useful if you have multiple goal sections and want to leave one out of the calculation.
Display in Objective/Competency section	Selected	Items from this section will be listed in the Objective/Competency summary section.
Lock item weights	Selected	Lock or unlock the item weights of a section. The user cannot change weights.
Include in overall performance summary section rating	Selected	Can exclude a section from or include a section in overall rating of the form.
Minimum Goals Required	Text entry	Set a minimum number of goals a user is required to enter.
Maximum Goals Required	Text entry	The maximum number of goals that are allowed to be in this section.
Section Weight for Obj/Comp Summary		Allows you to apply a relative weighting for that objective section relative to other objective sections in the Performance Management form.
Total Weight		Set target total weight for items in that section
Rating Scale		The name of the rating scale you want to be used.
Hide numeric rating values (only show text labels)	Selected	Makes ratings appear as their text labels, for example, *Excellent*.
Default Rating		You can give the default rating for a rating scale.
Choose an alternate label for the rating field		Enter the label of your choice, for example, *Too New to Rate*.

Section Permissions

For Roles and Route Steps

Action Permissions

Possible action permission are:

- Add item
- Remove item
- Both

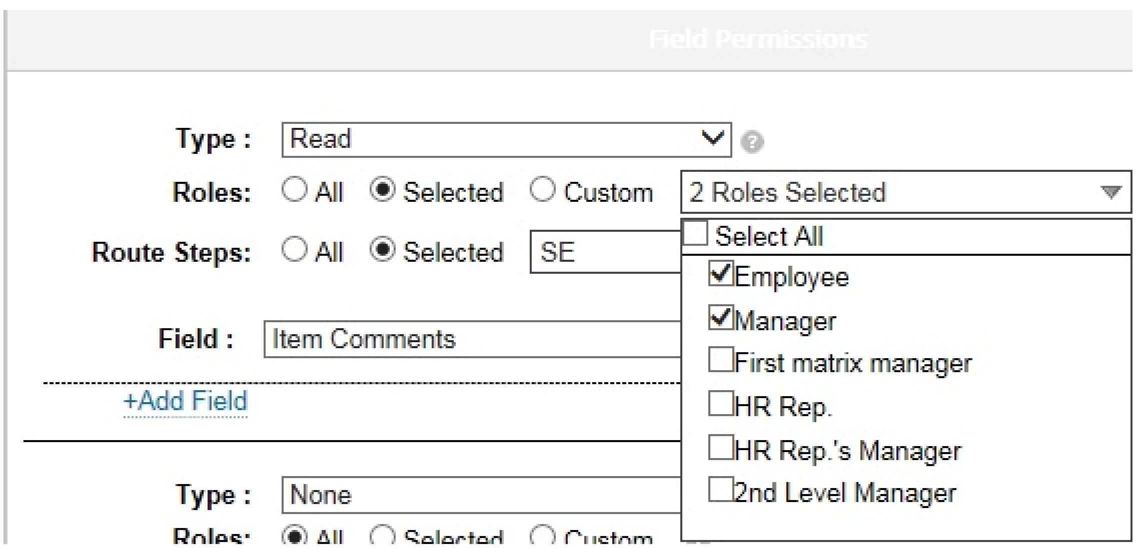
Field Permissions

Field permissions can be None, Read, or Write.

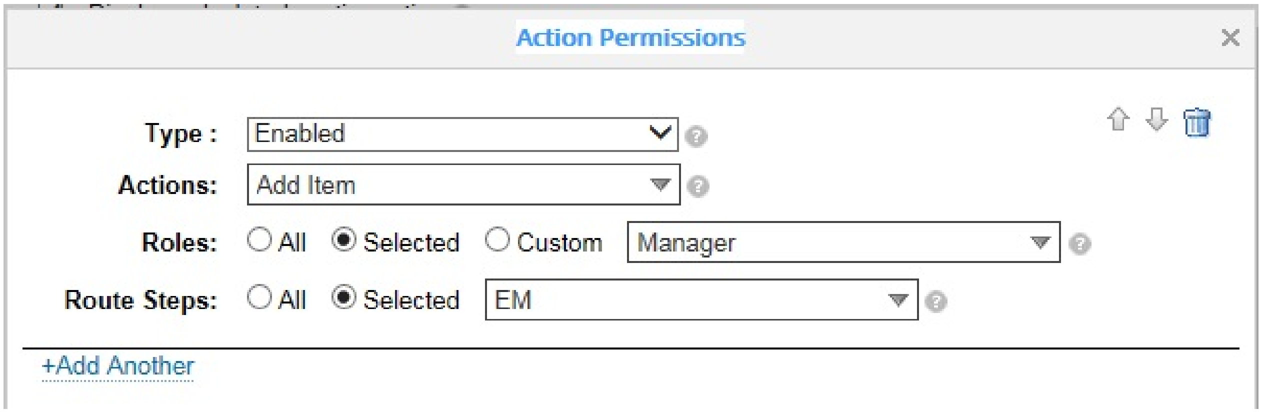
Fields are:

- Item Rating
- Unofficial User Rating
- Item Weight
- Section Weight
- Item Comments
- Subject Rating
- Section Comments

In this example, the employee cannot see item comments made by anyone other than himself and the manager for the signature step.

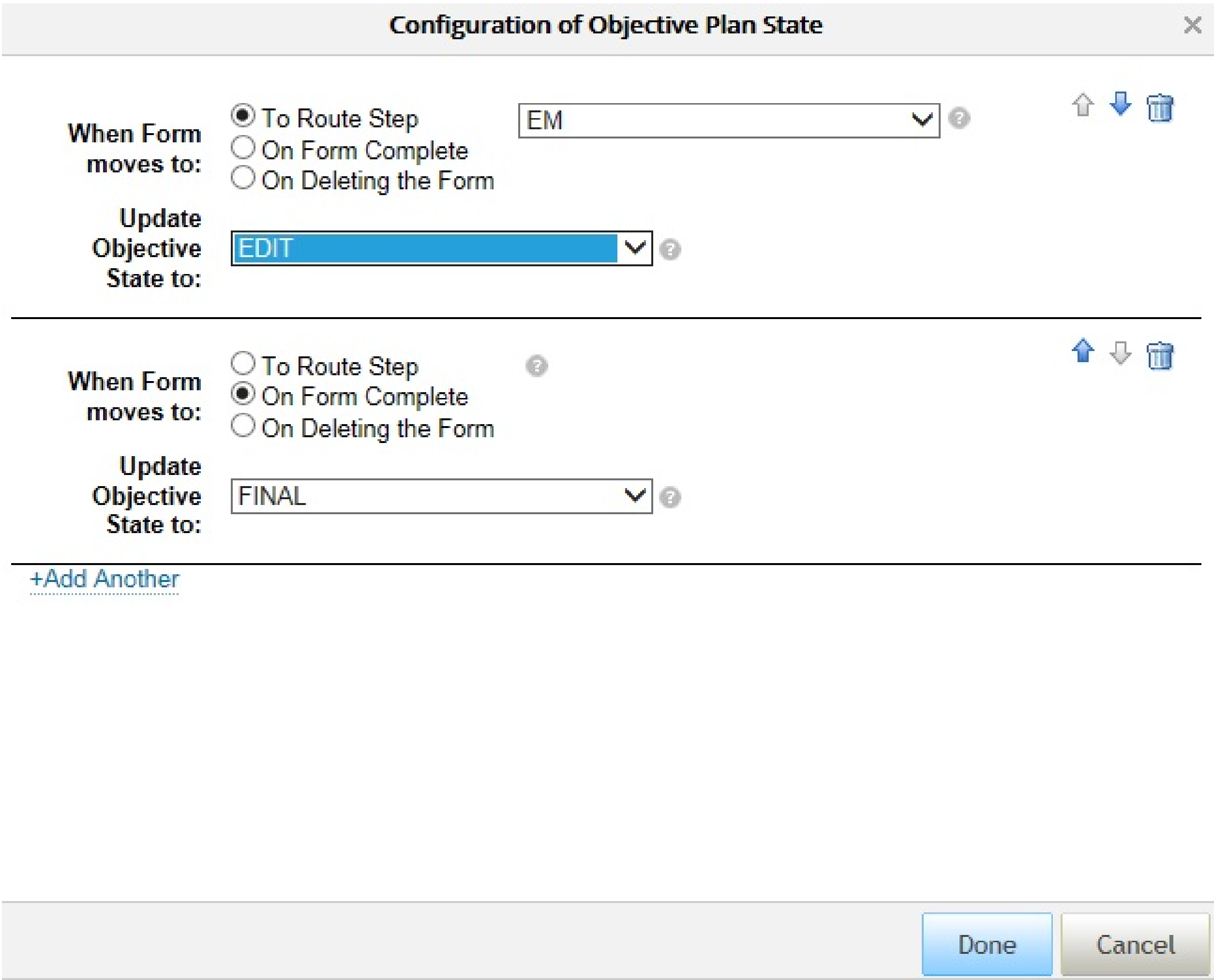


If you select *Allow users to add/remove objectives within the section,* you modify the action permissions for the section. If you select this option and do not specify permissions, all roles and add or remove objectives at all route steps. In this example, an action permission has been granted to the manager to add an objective at the EM route step.



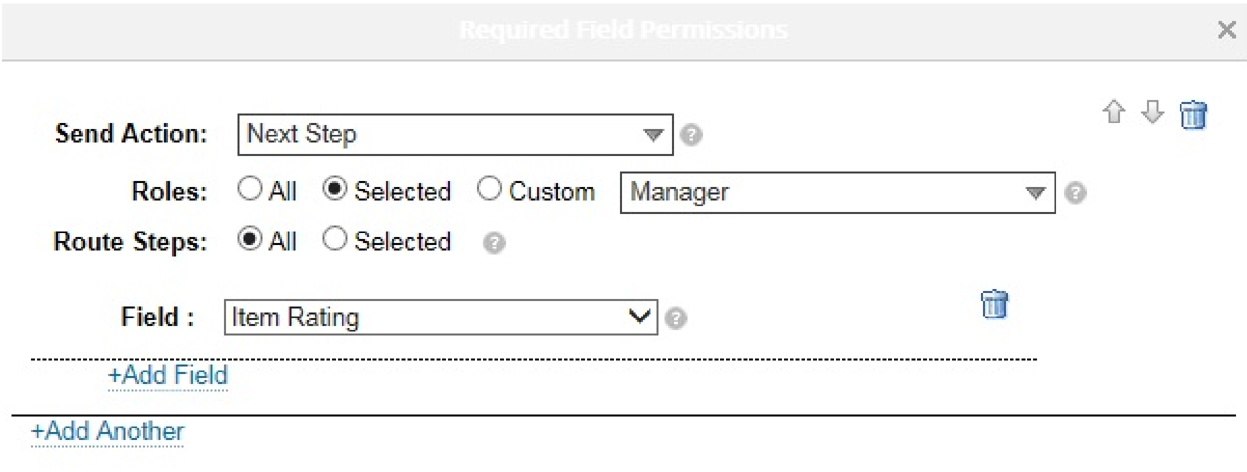
Objective Plan State

You can change the goal plan state (Objective Plan State) based on the route map step. For example, a customer might set up a quick performance management form and route map to start a goal-setting process. You can configure the form so that once it has been sent to a certain step, the manager can edit or update an objective. In this example, the goal plan has been configured to that when the form reaches the EM route step, the manager can edit the form. Then, when the form moves to the completed step, the objective is updated to *FINAL*.



Required Field Permissions

This field sets a requirement before a form is sent to the next step. For example, if a manager wants to send a form to the next step, he must enter something in a particular field. In this example, the manager is required to enter a rating in the *Item Rating* field before sending the form to the next step.



Related Information

Rating Options [page 156]
Auto-Synch and Auto-Populate [page 142]

10.3.4.1.1 Displaying Rating Score Derived from Metric Lookup Table

You can view the ratings of the metric-based goals on the Performance Form.

When there are goals that are metric-based, the rating is calculated based on the metric value. The metric values assigned to a rating must be achieved to qualify for the next rating. For example, Rating 4 has a metric value of 25.00, Rating 3 has a metric value of 20.00, Rating 2 has a metric value of 15.00, and Rating 1 has a metric value of 10.00. If the employee achieves a metric value of 19.99, their rating would be a 2.

In Performance Management, the score calculated through the metric lookup table in the goal plan is populated in the Performance Review form as star ratings for a 3 point or a 5 point rating scale.

> **Note**
>
> When a Metric Lookup table is being used to calculate the rating, but the value does not match the rating scale, only the star rating and the rating value is displayed. The rating label is not displayed.
>
> For example, if you have a rating scale, where 1.0 - Unsatisfactory, 2.0 - Needs Development, 3.0 - Meets Expectations, 4.0 - Exceeds Expectations, and 5.0 - Substantially Exceeds Expectations, and if an employee is given a rating of 2.75, a two and a half filled star rating is displayed along with the rating value 2.75. The label "Needs Development", is not a fair statement. Hence, it is not displayed.

10.3.4.2 Auto-Synch and Auto-Populate

The goals in a goal plan can be auto-populated on to a performance appraisal form. When the form is created, any goals already created in the Goals module will be included in the form. Goals can also be auto-synchronized between a goal plan and a performance appraisal form.

When goals are changed, added, or removed from a goal plan those changes automatically apply to the performance appraisal form.

Auto-Populate

Change Made on Goal Plan	Results on Goal Section in PM Form	Change Made on Goal Section in PM Form	Results on Goal Plan
Add a goal after form opened	New goal does not appear	Add goal	New goal appears
Add goal before form opened	New goal automatically appears, if configured		
Add target or task	New target or task appears	Add target or task	New target or task appears
Edit target, task, goal name, and so on	Changes appear	Edit target, task, goal name, and so on	Changes appear
Remove goal	Goal still appears and is not deleted	Remove goal	Goal still appears and is not deleted

Note

If new goals are created in the Goals module after a form has been created, the user must manually add any new goals created to the Performance Management form.

Auto-synchronize

Change Made on Goal Plan	Results on Goal Section in PM Form	Change Made on Goal Section in PM Form	Results on Goal Plan
Add a goal after form opened	New goal appears	Add a goal	New goal appears
Add goal before form opened	New goal automatically appears, if configured		
Add target or task	New target or task appears	Add target or task	New target or task appears
Edit target, task, goal name, and so on	Changes appear	Edit target, task, goal name, and so on	Changes appear
Remove goal	Goal is deleted without warning message	Remove a goal	Goal is deleted without a warning message

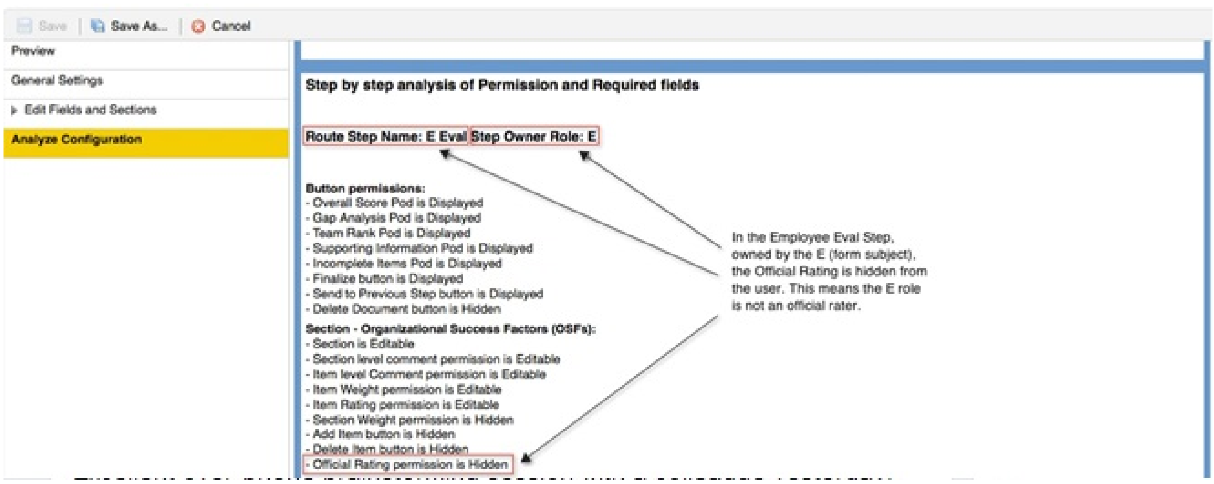
> **Note**
>
> Changes to goals on a form auto-synch to the goal plan in the Goals module when the form is saved.

10.3.4.3 How to Configure Rating Options in Performance Management v12 Acceleration

While it may seem complex to convert Performance Management v12 official rating configurations to Performance Management v12 Acceleration rating options, the *Validation Tool* in *Manage Templates* does most of the work for you. We recommend that you record your current rating configurations before using the Validation Tool. Locate the configurations by analyzing the configuration of the template as follows:

Procedure

1. Open the Performance Management v12 template for which you want to convert the rating configurations in the Manage Templates tool.
2. Select *Analyze Configuration* on the left side of the page.



The tool analyzes the most common configurations and shows you where there are potential configuration issues. You can see the

- Route Step Name
- Step Owner Role
- Permissions

Roles with *write* permissions are official raters and roles with *hidden* permissions are not official raters. We recommend that you take note of the roles and steps that have *hidden* or *write* permissions.

> **Note**
>
> Sometimes a role may be granted write permission for the official rating in one step but not in another step. Doing so makes it possible for a role to assign a rating that affects the rating of record. If the rating of record is later changed by another role, the initial role can see only the rating of record.

3. Review all the configuration changes to be made by the Validation Tool, then click *Update and Edit*, which copies the template to a new, Performance Management v 12-compatible template.

   The validation tool sets a baseline rating options configuration that can be further configured to match your previous settings. The baseline set is:
   - Rating Option 2: everyone can rate in his or her own data field and any roles who are to determine the final rating of record are granted access to the single rating of recorded data field.
   - Field permissions are set to grant access to the rating of record data field to the direct manager (EM) role.
4. Approve the form for launch.
5. Test all forms before launching.

10.3.5 Competency Section: Advanced Options

Competency sections of forms are configurable to be either for core values you have set for your company, or job specific competencies. Creating and managing competencies is done in a separate administration tool. Job-specific competencies are dynamically pulled for each user based on the user's job code and role.

You can set the competency section of a form to gather comments only, gather ratings only, or gather both. If

You want to	Select
Gather comments	*Include a comment for each item*
Gather ratings	*Include the ability to rate*
Gather both comments and ratings,	*Include a comment for each item and* *Include the ability to rate*

Option	Comments
Allow users to add competencies	If you want users to be able to select competencies from the libraries and add them to the form.
Show behaviors	Behaviors must be loaded into your competency library. Select the Display Mode. You can choose to: • Show only job-specific behaviors • Enable the rating of behaviors associated with the competency
Include the ability to rate	*Select* if you want to rate employees using the rating scale selected in the General Settings. If this is not selected, reviewers of the form are not able to select a rating for the employee for the section.
Rating-opt=0 Include the ability to rate *and* • Everyone shares one rating box for each item	The form will have only one rating box for each item, and you can set permissions for which role can make the rating. If it's permissioned for more than one role, the last rating entered will be the final score.

Option	Comments
Rating-opt=1 Include the ability to rate *and* • Everyone shares one rating box for each item • Except the employee who has a private self-assessment rating box	The form will have only one rating box for each item, and you can set permissions for which role can make the rating. If it's permissioned for more than one role, the last rating entered will be the final score. The form will have a private self-assessment box for the employee, plus a single rating box, which can be permissioned by role, and which becomes the final score.
Rating-opt=2 Include the ability to rate *and* • Everyone shares one rating box for each item • The final score can be granted to any role by permission	The form has only one rating box for each item and you can set permissions to determine which role can make the rating. If there are permissions for more than one role, the last rating entered is the final score. You can also choose the give the employee a private self-assessment rating box. There is also a single rating box that can be permissioned by role and becomes the final score.
Rating-opt=3 Include the ability to rate *and* • Everyone has their own rating box for each item • The Final score is the EM's rating	Everyone has a rating box and sees his or her own box next to the employee's self assessment. You need to select the final score: • EMs rating • Can be granted to any role by permission (field permission)
Include a comment for each item	Selected: Enables users to comment on each item - goal or competency- in the form. Not selected: no comment box is displayed.
Include an Overall comment	Enables one comment box for the section.
Include in Overall Competency rating calculation	Lets you do a calculated rating over the goal sections. This is particularly useful if you have multiple goal sections and want to leave one out of the calculation.
Display in Competency section	Items from this section will be listed in the Objective/Competency summary section
Show expected competency rating	This option is available only to competencies. It allows you to show an expected rating for the job role along with the actual rating, to view the gap between an employee's expected and actual performance.
Include in overall performance summary section rating	Selected: This section will be included in the overall score calculation in the Performance Summary. Not Selected: This section will not be included in the overall score calculation in the Performance Summary.
Include the ability to enter in a weight	Selected: Allow the user to enter a weight for the section. Not selected: The user will not be allowed to enter a weight for the section.

Option	Comments
Display Section in Summary	Display ratings from this section in the Summary section You can select to display a calculated section rating in the summary
Include competencies based on Filters **Note** Relevant for custom competency sections	You can populate competencies into the form based on the: • Job Code • Department • Title • Customizable field

10.3.6 Development Plan Section: Advanced Options

The *Development Plan* section is similar to a goal section

Development goals were not ratable in Performance Management v12 but they are ratable in Performance Management v 12 Acceleration.

As with other sections you choose to:

- Include the ability to rate
- Include the ability to enter in a weight
- Include a comment for each item
- Include an overall comment
- Allow users to add or remove objectives within the section
- Set section permissions
- Set action permissions

10.3.7 Performance Summary Section

The *Summary* section, also called the *Performance Summary* section, displays summarized information from all other section in one central area.

Option	Info
Allow manual rating	When selected, allows users to manually override ratings on the form. All reporting of employee scores rely on the manually entered score instead of the auto calculated score.
Allow manual rating *and* Everyone has his own rating box for each item	Then you choose if the final score: • is the EM's rating • is granted to any role by permission

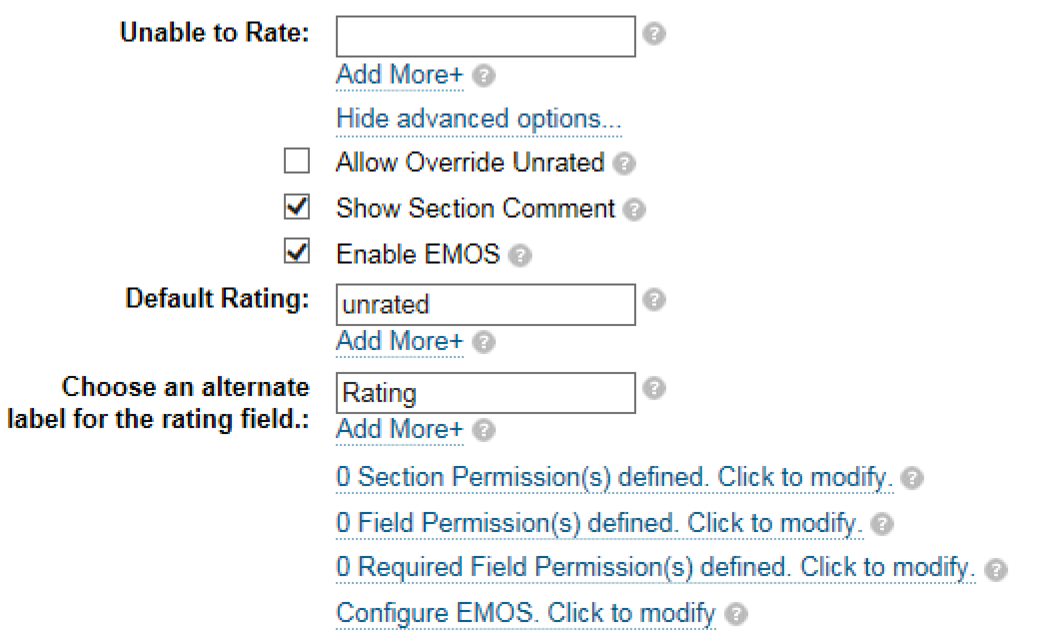
Option	Info
Weight Section Equally	Click to weight each section of the form equally to add up to 100% *or* Manually enter section weights
Allow Override Unrated	If a manual rating is enabled, select this option to allow the calculated rating to write over the unrated manual rating when sending the form to the next step.
Show Section Comment	Select to enable section comments
Everyone shares one rating box for each item *and*Except the employee who has a private self-assessment rating box	Self explanatory

Enable EMOS

When you configure EMOS, or *Enforce Maximum Overall Score*, you set limitations on the rating that a specified role can give to an employee. Sometimes called *Fail one, fail all*, EMOS allows the form to set a maximum possible overall score to be selected by the rater, based on minimum scores at the goal or competency level. The rater cannot give a higher score that what is permitted by the form. This option enforces a limit on the manual overall score based on the lowest goal and competency ratings in the form.

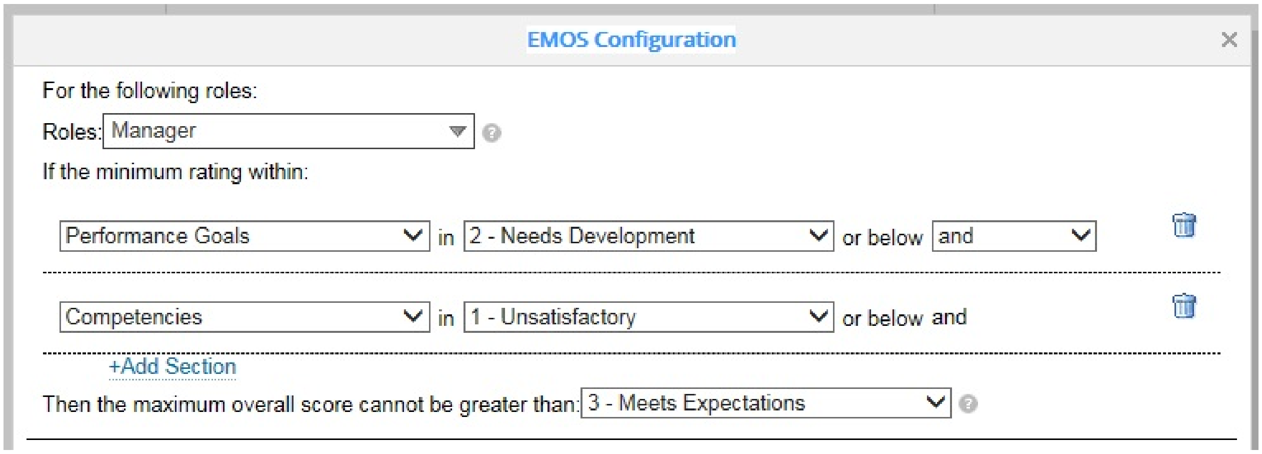
To enable EMOS you need to

1. Select *Enable EMOS* in the *Advanced Options.*
2. Select the *Configure EMOS* link.



3. Configure the parameters in the *Configuration* screen.

In this example, when a *Manager* rates an employee, if the employee's *Performance Goals* are at the *Needs Development* level or below, and the competencies are *Unsatisfactory* or below, then the manager cannot select a maximum overall score greater than *Meets Expectations*. When EMOS is configured, only the available ratings are enabled in the list of possible ratings.



In the Summary section you can also:

- Select default ratings
- Enter an alternate label for the rating field.
- Set section and field permissions
- Set required fields

There isn't an option to select a rating scale. The rating scale in the summary section is the one set in the General Settings. If a rating scale is not configured in a section in which you can configure a separate one, the form uses the rating scale set in the General Settings.

10.3.8 Signature Section

In the signature section you can set section permissions and required fields.

You can set a required field for Section Comments in the Signature Section, which means that an employee is required to enter a comment before signing the form. This is the only required field available.

10.3.9 Objective Competency Section

The Objective Competency section calculates three scores: an Overall Objectives score, an Overall Competencies score, and an Overall Objective/Competency score.

The scores can be plotted to determine the quadrant in which an employee fall on an optional obj-comp chart if the chart is configured.

The objective score is an aggregate of the ratings from all the objective sections selected for inclusion in the form template configuration in the Performance Management form. The competency score is an aggregate of the ratings from all the competency sections selected for inclusion in the Obj/Comp calculations in the Performance Management form.

> **Note**
>
> If an Objective/Competency Score, that is, the score that combines the two, is used, it supersedes the overall score in the performance summary section. The manual performance rating in the Performance/Potential section supersedes this rating.

The overall objective/competency matrix is a graphic that shows the how the employee is placed with respect to his or her objective and competency ratings.

Advanced options are:

- Show section comments
- Calculate the overall competency rating
- Allow overall competency rating to be edited
- Calculate the overall objective rating
- Allow the overall objective rating to be edited
- Show the overall objective/competency rating
- Display the overall objective/competency matrix
- Overall Rating Display Order - manual, then calculated, or calculated, then manual
- Section Display Order - competency, then objective, or objective, then competency
- Section permissions
  - Roles
  - Route steps
- Field permissions
  - Roles
  - Route steps
- Required field permissions
  - Competency Manual Overall Rating - Used to control the visibility of the calculated competency rating section in a competency section where rate by behaviors is turned on.
  - Objective Manual Overall Rating - Used to control the visibility of the calculated competency rating section in a competency section where rate by behaviors is turned on.

10.3.10 Performance Potential Summary Section

The Performance-Potential summary section supports two overall scores: an overall Performance score and an overall Potential score. These two scores can then be plotted to determine the quadrant in which an employee fall on the performance-potential chart. These two scores are completely independent of each other.

> **Note**
>
> The manual Performance score in this section, if configured, will become the rating of record for the whole form.

Options are:

- Show section comments
- Allow overall performance rating to be edited.
- Allow overall ratings to be edited.

- Allow potential rating to be edited
- Display the overall performance-potential matrix
- Section Display Order: Show the performance before the potential or the potential before the performance
- Section permissions
- Field permissions
- Required Field Permissions
  - Manual Performance Rating: Set the default rating value for the manual performance score.
  - Manual Potential Rating: Set the default rating value for the manual potential score.

> **Note**
>
> Section weights are not displayed beside a section name when a performance potential summary section is configured in the form. This is because the performance rating, that is, the rating of record, is determined by the selection in the matrix section and not the weightings from the individual sections. The rating of record is based on the manual selection of values in the matix section, and the weightings in the sections are ignored.

10.3.11 Rating Calculation

Provides information on rating calculations used in Performance Forms.

Overview

Normally rating calculations are done at:

- Overall Ratings
  - Form Rating from Section Ratings (Summary)
  - Overall Objective Rating from Goal Section Ratings (ObjCompSummary)
  - Overall Competency Rating from Competency Section Ratings (ObjCompSummary)
  - Overall Calculated Objective Competency Rating (ObjCompSummary)
- Section Rating from Item Rating
- - Objective Section
  - Competency Section
- Competency Rating from Behavior Ratings
- Calculated Objective Rating with MLT (on Total Goal Management)

10.3.11.1 Configuring Rating Scale for Rating Calculation

Provides details for configuring the rating scale in form template.

The default XML for rating scale configuration in form template is as follows:

```
<fm-sect-scale show-value="true">
  <scale-source>1</scale-source>
  <scale-id><![CDATA[5pt]]></scale-id>
  <scale-type><![CDATA[null]]></scale-type> ---- As per the comment on PMU-290, PMU
doesn't support BAR, RADIO, FREETEXT scale types
</fm-sect-scale>
```

Customized rating map based on calculation (adjusted calculation) also can be configured for rating scale `<fm-sect-scale>` as below:

```
<scale-adjusted-calculation enable="true"  display-calculated-rating="true">
  <scale-map-value>
    <score-min>0.01</score-min>
    <score-max>1.0</score-max>
    <mapto-score>1.0</mapto-score>
    <mapto-desc><![CDATA[ONE]]></mapto-desc>
  </scale-map-value>
  <scale-map-value>
    <score-min>1.01</score-min>
    <score-max>2.0</score-max>
    <mapto-score>2.0</mapto-score>
    <mapto-desc><![CDATA[TWO]]></mapto-desc>
  </scale-map-value>
  <scale-map-value>
    <score-min>2.01</score-min>
    <score-max>3.0</score-max>
    <mapto-score>3.0</mapto-score>
    <mapto-desc><![CDATA[THREE]]></mapto-desc>
  </scale-map-value>
  <scale-map-value>
    <score-min>3.01</score-min>
    <score-max>4.0</score-max>
    <mapto-score>4.0</mapto-score>
    <mapto-desc><![CDATA[FOUR]]></mapto-desc>
  </scale-map-value>
  <scale-map-value>
    <score-min>4.01</score-min>
    <score-max>5.0</score-max>
    <mapto-score>5.0</mapto-score>
    <mapto-desc><![CDATA[FIVE]]></mapto-desc>
  </scale-map-value>
</scale-adjusted-calculation>
```

When the default rating is 'Unrated" then: `<default-rating><![CDATA[unrated]]></default-rating>`

When the rating is 'Explicit Unrated', such as "Too New To Rate", then: `<unrated-rating><![CDATA[Too New To Rate]]></unrated-rating>`

10.3.11.2 Configuring Weights for Rating Calculation

Provides you information on section weights, item weights and competency/objective summary weights.

Section Weight

- **Predefined Section Weight**
  <sect-weight>: Section weight can be predefined with element <sect-weight>xx.x</sect-weight>. Once the Performance Form is created, the predefined section weight is shown in Summary section. This element is available for Objective section and Competency section.
  <sect-weight-4-objcomp-summary>: The weight configured in element <sect-weight-4-objcomp-summary> appears in OCOC section. Competency rating calculation and Objective rating calculation are performed based on the weight configured in this element. This element is available for Objective section and Competency section.

- **Related Attributes in <sf-pmreview> of form template**
  weight-lockdown: true if not allowing users to modify section weights if applicable.
  show-weight: true if display section weights if applicable.

Item Weight

- **Item Weight Restriction**
  meta-item-weight-floor-ceiling-option: Enforcement Option for Item Weights Floor and Ceiling: "error" or "warning"
  weight-total-option: Enforcement option for item weight totals: "enforce" or "warn"
  fm-meta:

  ```
  <meta-item-weight-floor-ceiling-option>warning</meta-item-weight-floor-ceiling-
  option>
  ```

  objective-sect / competency-sect:

  ```
  <weight-total><![CDATA[100.0]]></weight-total>
          <hidden-strength-threshold>0.0</hidden-strength-threshold>
          <blind-spot-threshold>0.0</blind-spot-threshold>
          <item-weights>
            <item-weight-floor>10.0</item-weight-floor>
            <item-weight-ceiling>70.0</item-weight-ceiling>
          </item-weights>
          <weight-total-option><![CDATA[warn]]></weight-total-option>
  ```

- **no-weight and auto-pop-weight**
  no-weight = true
  - User can see Objective weights neither on the PM form nor overall score callout. Objective Section rating is averaged of the rating of all objectives.
  - Objective Weight field in Goal Management has no linking to weight on Performance Management form.
  - ‘auto-pop-weight’ configuration is ignored.

  no-weight = false
  - Objective weights in the PM form are based on the ‘auto-pop-weight’ configuration
  - **IF auto-pop-weight = false**
    - Goals do not use same weights as in the Goal Plan.
    - By default, all Goals in a section have weight 0.
    - User sees the Objective weight in the top right corner of each Objective and can edit the weight if permission settings allow.
    - Changes to Objective weight do not change the ‘Weight’ field of the Objective in Goal Plan.
  - **IF auto-pop-weight = true**
    - Goal weights in the section are same as their weight in the goal plan.
    - User can see Goal weights on the Performance Management form with 'read only' mode.
    - User can update Goal weights in the Goal Plan or on Goal detail dialog using the edit link for Goal item

Competency/Objective Summary Weight

These two summary weights are used in OCOC calculation when `ococ-rating-calc-mode` is "avg" for Competencies and Objectives. They are invisible to end user.

objcomp-summary-sect:

```
<comp-cal-summary-weight><![CDATA[40.0]]></comp-cal-summary-weight>
       <obj-cal-summary-weight><![CDATA[60.0]]></obj-cal-summary-weight>
```

10.3.11.3 Configuring Calculation Type for Rating Calculation

Provides information on configuring the calculation type in different rating sections.

- Overall Form Rating: `meta-form-rating-calc`: Use this element to select the rating calculation method at the form level. This shows overall calculated rating in summary section.

  ```
  <fm-meta>
        ...
        <meta-form-rating-calc><![CDATA[sum]]></meta-form-rating-calc> ----"avg",
  "sum" can be configured
        ...
  </fm-meta>
  ```

  > **Note**
  >
  > This configuration only impacts the Summary section calculation.

- OCOC Rating: `ococ-rating-calc-mode` ---- "avg", "sum", "matrix-lookup": Use this attribute to specify the method of calculating the overall rating for the objective competency summary section.

  ```
  ococ-rating-calc-mode="sum"
  ```

  Refer, Calculation Process [page 154] for information about the processes involved in rating calculation.
- Section: `section-rating-calc`: Use this element to select the rating calculation method at the section level.

  ```
  <fm-sect-config>
        ...
        <section-rating-calc><![CDATA[sum]]></section-rating-calc> ----"avg",
  "sum" can be configured
        ...
  </fm-sect-config>
  ```

  > **Note**
  >
  > This configuration can be added in OCOC, Objective and Competency sections.

- Competency: `section-item-rating-calc`: Use this element to select the item rating calculation method at the section level.

  ```
  <fm-sect-config>
        ...
        <section-rating-calc><![CDATA[sum]]></section-item-rating-calc> ----"avg",
  "sum" can be configured
  ```

```
    ...
</fm-sect-config>
```

> **Note**
>
> This configuration can be added in OCOC, Objective and Competency sections.

- Friendly: `rate-by-adding-values` With attribute rate-by-adding-values="true" configured in <sf-preview>, rating will be added while ignoring weights (no normalization). This is called the Friendly calculation formula.

```
<sf-pmreview no-calc="false" overall-rating="true" rate-by-adding-values="true"
weight-lockdown="false" show-weight="true">
```

- Matrix Lookup (OCOC)
  This is a two dimensional lookup. It will be used when `ococ-rating-calc-mode="matrix-lookup"`
  The matrix is configured in element `<scale-adjusted-matrix>` in OCOC section.
  With this calculation method, OCOC rating is resulted from the matrix-lookup table which is configured in `<objcomp-summary-sect>` section in form template. Below is an example of matrix map value:

```
<scale-adjusted-matrix enable="true"  show-value="true">
  <rating-label><![CDATA[Overal Performance Rating(OCOC):]]></rating-label>
  <default-rating><![CDATA[unrated]]></default-rating>
  <matrix-map-value>
    <obj-score-min>1.0</obj-score-min>
    <obj-score-max>1.49</obj-score-max>
    <comp-score-min>1.0</comp-score-min>
    <comp-score-max>1.49</comp-score-max>
    <mapto-score>1.0</mapto-score>
    <mapto-desc><![CDATA[Below]]></mapto-desc>
  </matrix-map-value>
</scale-adjusted-matrix>
```

- Other Calculation Configuration
  - Suppress form rating calculation: `no-calc="true"`
  - Suppress rating for section: `no-rate="true"`
  - Suppress section rating from summary calculation: `in-overall-rating="false"` or `in-objcomp-summ-overall-rating="false"`
  - Number of decimal places: `fm-sect-config/num-decimal-places`

10.3.11.4 Calculation Process

Provides information about the processes involved in rating calculation.

Normalization

Rating normalization occurs when source scale is different from target scale. It typically is used for `calc-type="avg"`.

Steps

1. **Source Rating to Fraction**: Use (rating-scaleMin)/(scaleMax-scaleMin)

2. **Calculation**: Use any of the Calculation Formula listed below
3. **Target Fraction to Rating**: Use calculatedFraction*(scaleMax-scaleMin) + scaleMin

Example

- Overall performance rating scale is 1 -3
- Competency section rating scale is 1 - 5 and the competency section rating is 4
- What competency rating should be calculated in overall rating?
  (((rating - original min)/(original max - original min)) * (new max - new min)) + new min ((4-1)/(5-1))*(3-1)) + 1 = 2.5

Calculation Formula

Average

This is the default calculation type ("avg")

avg = (rating1*w1 + rating2*w2 + rating3*w3) / (w1+w2+w3)

Sum

sumRating = (rating1*w1 + rating2*w2 + rating3*w3) / 100

> **Note**
>
> Rating 1, Rating 2, etc may/may not be normalized based on the caclulation type and the rating being calculated. We should update it to be consistent.

Friendly

With attribute `rate-by-adding-values="true"` configured in `<sf-preview>`, rating will be added while ignoring weights (no normalization). This is called the Friendly calculation formula.

friendly = rating1 + rating2 + rating3

Matrix Lookup (OCOC)

Two dimensional lookup based on the lookup map configured in OCOC section. The rule for OCOC rating calculation based on matrix look up table:

- If both Competency rating and Objective rating are EXPLICIT_UNRATED (too new to rate), the result is EXPLICIT_UNRATED.
- If either Competency rating or Objective rating is NOT_APPLICABLE, the result is NOT_APPLICABLE.
- If we cannot match value in matrix look up table, then return NOT_APPLICABLE.
- Else, return the matched value in matrix look up table.

Round of Rating

Rounding happens after every calculation. The rounded value is used for subsequent calculation.

If `scale-adjusted-calculation` is specified in `fm-sect-scale`, the calculated rating will be rounded and adjusted accordingly via lookup.

10.4 Rating Options

In earlier versions of Performance Management, the designation of a role other than the direct manager (EM) role as the official rater of a form in Performance Management v12 templates was configured via a permission called official rating permission. This configuration is no longer supported in Performance Management v12 Acceleration

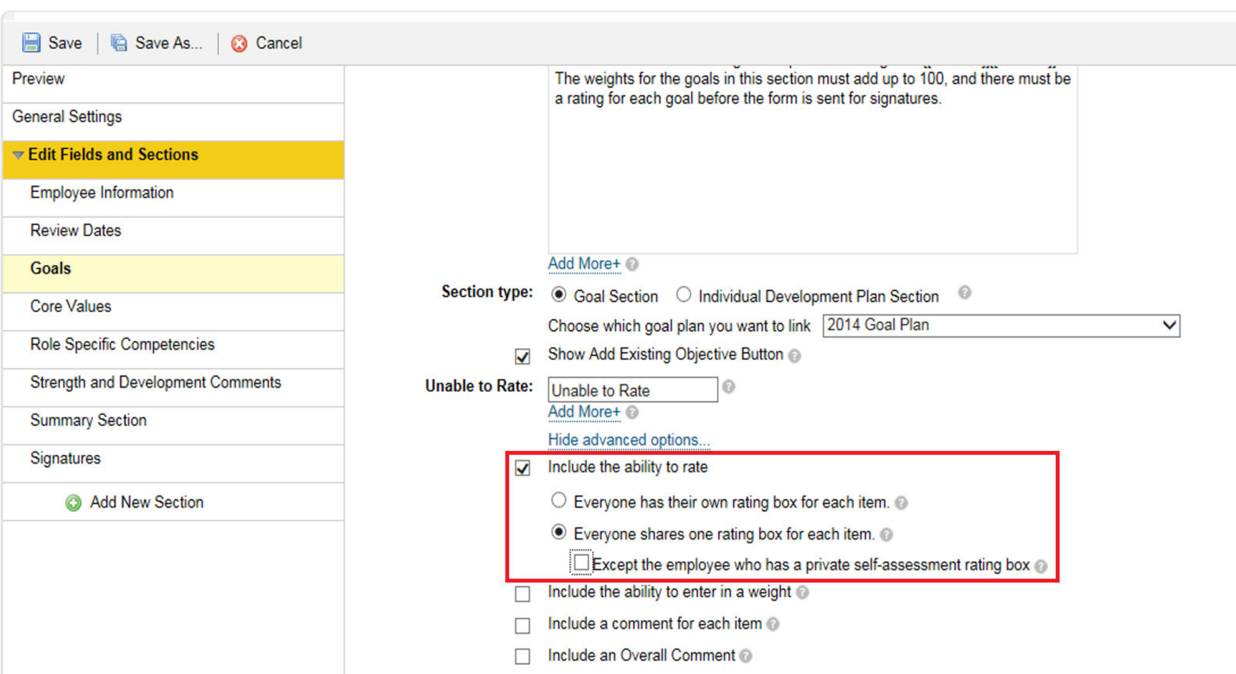
Rating Options in Performance Management v12 Acceleration

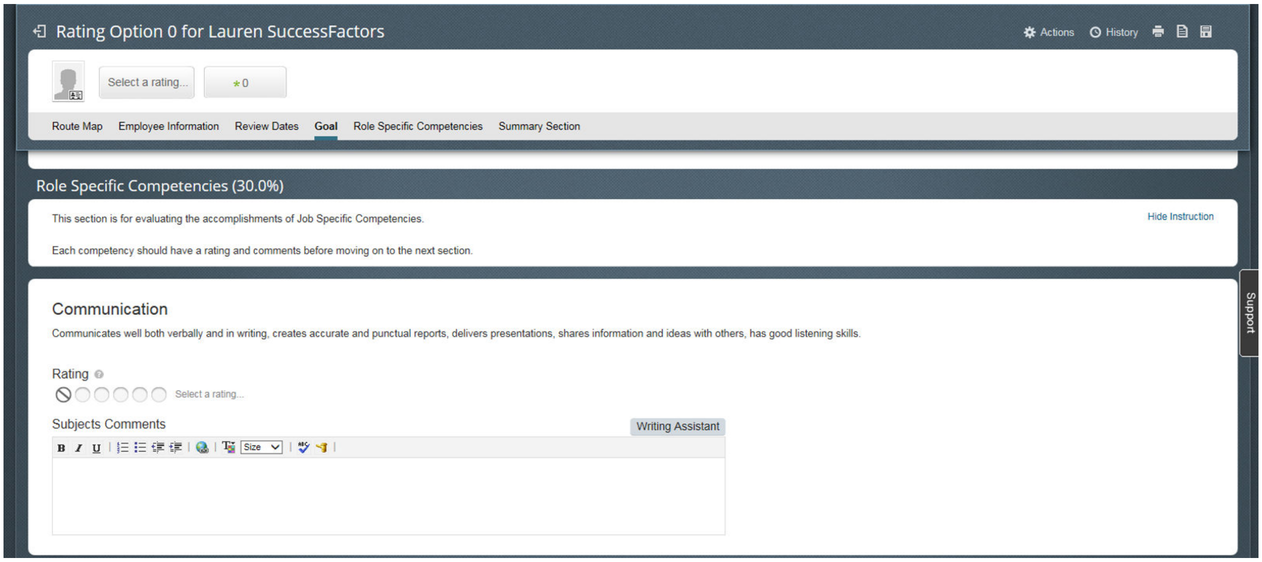
In Performance Management v12 Acceleration, the rating of record is stored in a separate data field from the rating that is considered to be a user's personal rating. The configuration of who has influence over the final rating form has two layers. These layers are selected *Rating Option* with, in some cases, the addition of *Field Permissions*.

Rating Options

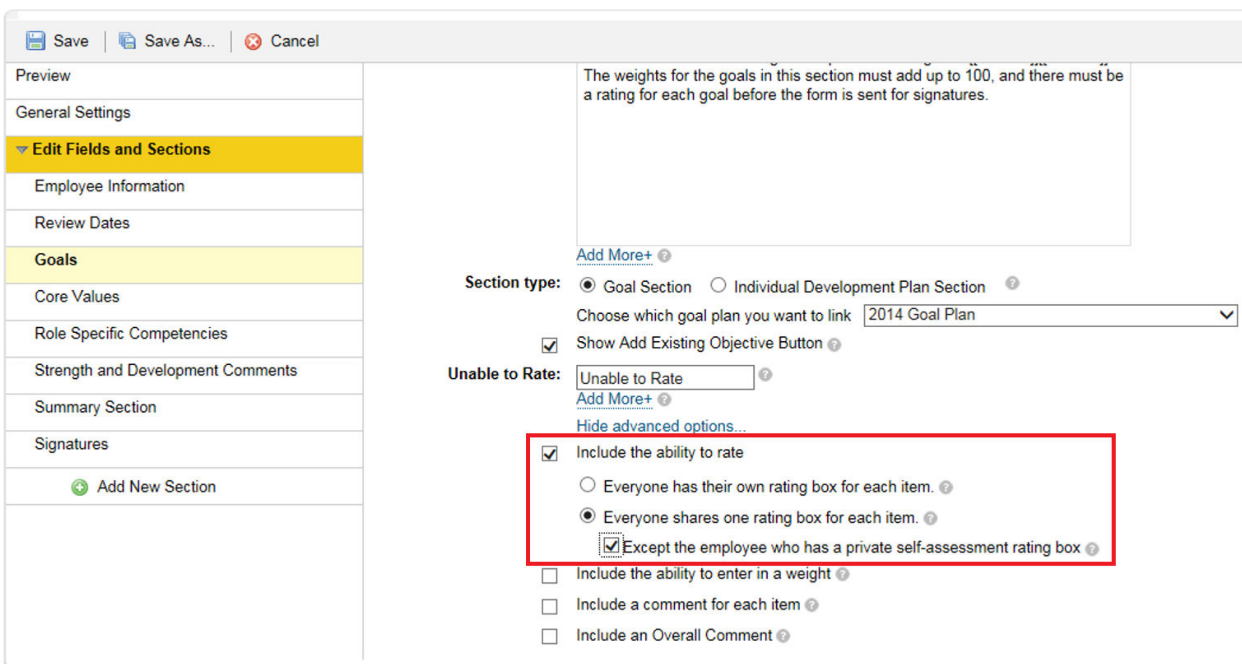
There are 4 rating options supported in Performance Management v12 Acceleration that determine the first level of configuration:

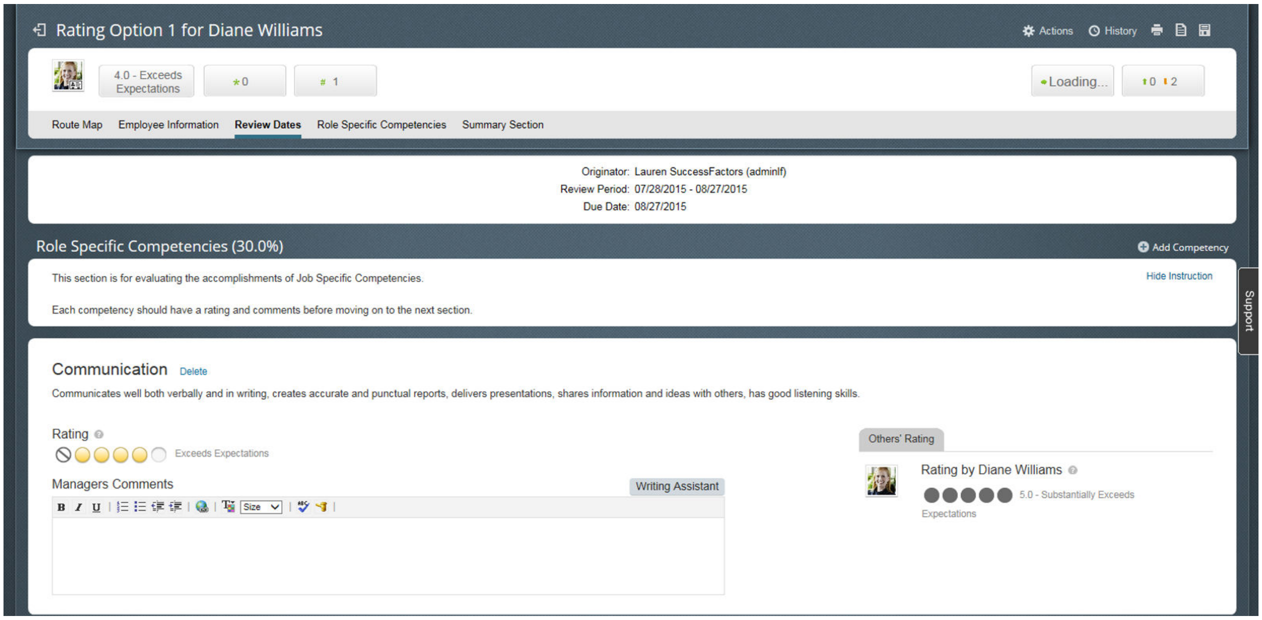
Rating Option 0: All the users with permission shares one rating box for each item. This is known as the rating of record, also referred as the item-rating. Only the rating of record field (item-rating) is displayed and is editable by any user with write permissions for the field. The first user can set a rating of record until the next user changes it. The last user in the route map with write access has final say over the rating of record.



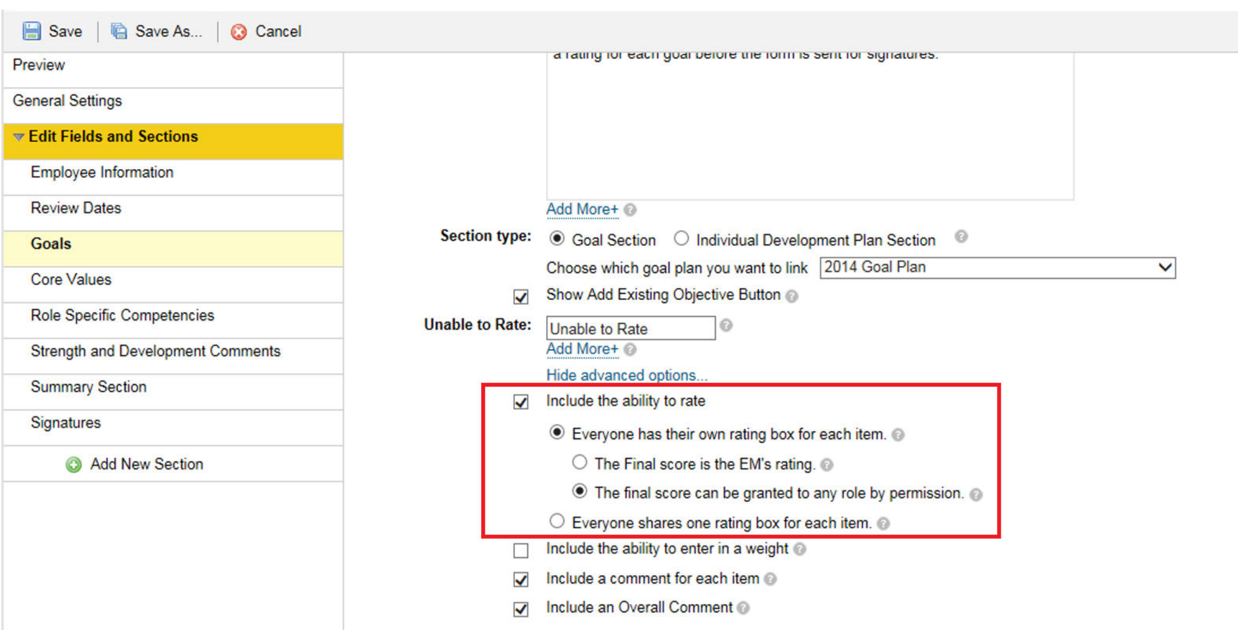


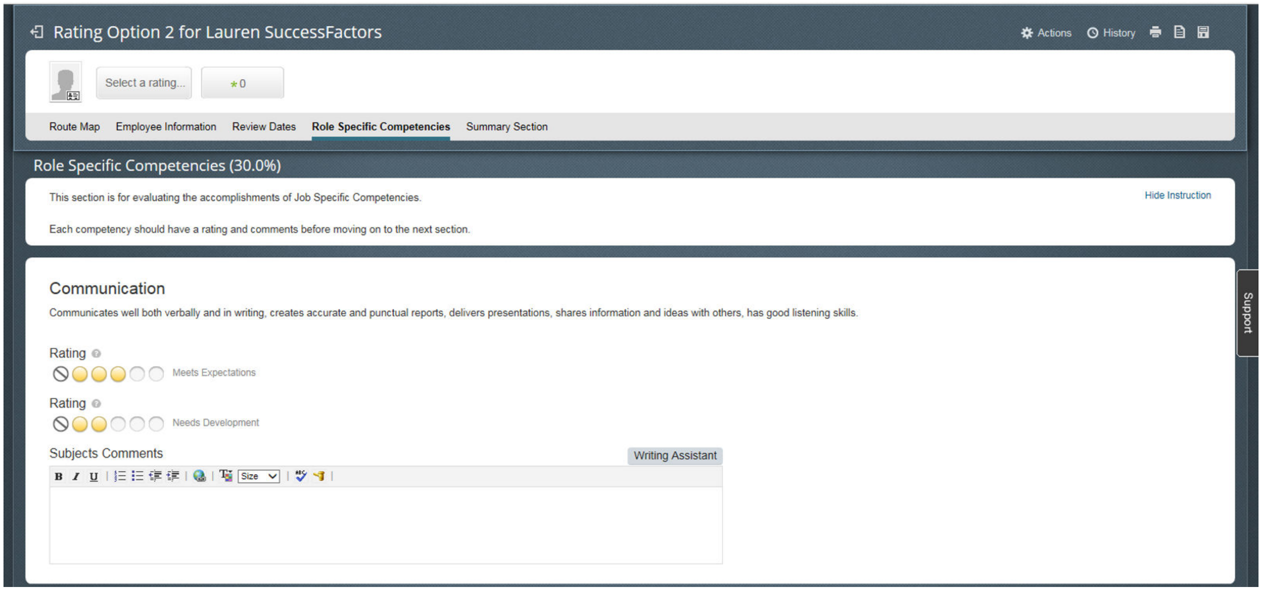
Rating Option 1: In Rating Option 1, everyone is able to edit the rating of record field (item-rating) until the fields are permissioned. For users updating the rating of record field, the last user in the route map with permission to this field will provide the final rating of record for the item. In addition to the rating of record field, the employee is also able to edit the unofficial user rating field (item-cmt-rating). The ideal configuration for the employee role is to grant read or none permission to the rating of record field (item-rating) which will prevent the employee from providing the rating of record (item-rating).



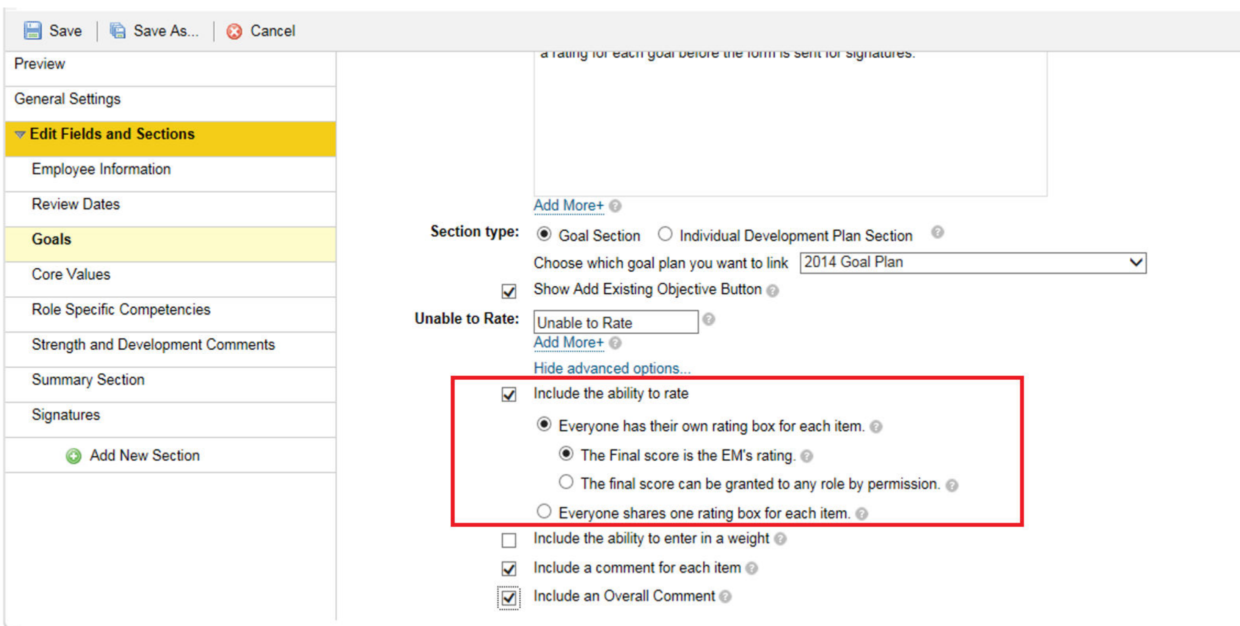


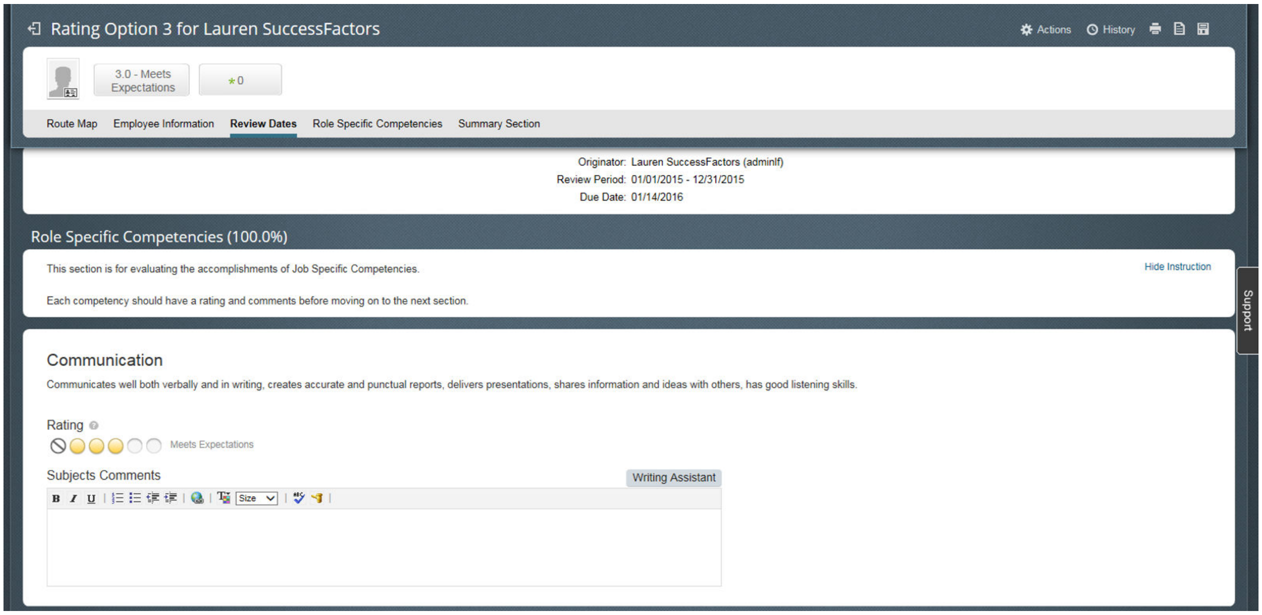
Rating Option 2: In Rating Option 2, everyone is able to edit both the rating of record field (item-rating) and the unofficial user rating field (item-cmt-rating) until the fields are permissioned. The user who should have the ability to provide the final rating of record should have write permission for the rating of record field (item-rating) and, should have at least read or write permission to the Unofficial user rating field (item-cmt-rating) so that they have visibility into the ratings provided by others. Users who should not have permission to update the rating of record field (item-rating) should have none permission for this field and read or write permission to the unofficial user rating field (item-cmt-rating).





Rating Option 3: One rating field appears for the subject of the form that only the subject can access. This is referred to as the subject-item-rating. Another rating appears for the manager, and this rating field can only be accessed by the manager. This is also know as the rating of record or item-rating, which is only displayed and can be written into by the EM (direct manager) role. The subject-item-rating field is displayed and is editable only by the subject of the form. No other users on the route map will be able to rate the form.





ℹ Note

A Performance Management v12 form with official rating configurations is best be supported in Performance Management v12 Acceleration by *Rating Option 2*. You need to set field permissions so that non-rating-of-record users are granted permission for `item-cmt-rating` and `rating-of-record` affecting users are granted permission for `item-rating`.

Field Permissions

With Rating Option 2, configuration of the roles that determine the rating of record is accomplished by putting permissions on the rating of record data field.

➔ Tip

To avoid confusion, we recommend hiding the personal rating field and displaying only the rating-of-record field for any role that has rating-of-record rights.

ℹ Note

Performance Management v12 customers whose templates include configurations for any role other than the direct manager (EM) role to determine the official rating of record will need to pay special attention to the Performance Management v12 Acceleration template validation process.

Parent topic: Configuring Templates Using Admin Center [page 108]

Related Information

Managing Templates [page 108]
Configuring the Template: General Settings [page 110]
Fields and Sections [page 131]
Configuring Desired Field and Section Permissions: Advanced Options [page 165]
Configuring Custom Roles Using Manage Templates [page 167]

10.4.1 Rating Option on the PDF and Print Version of Performance Management Form

To save the PDF version of the form, click the icon, and to print the form click the icon.

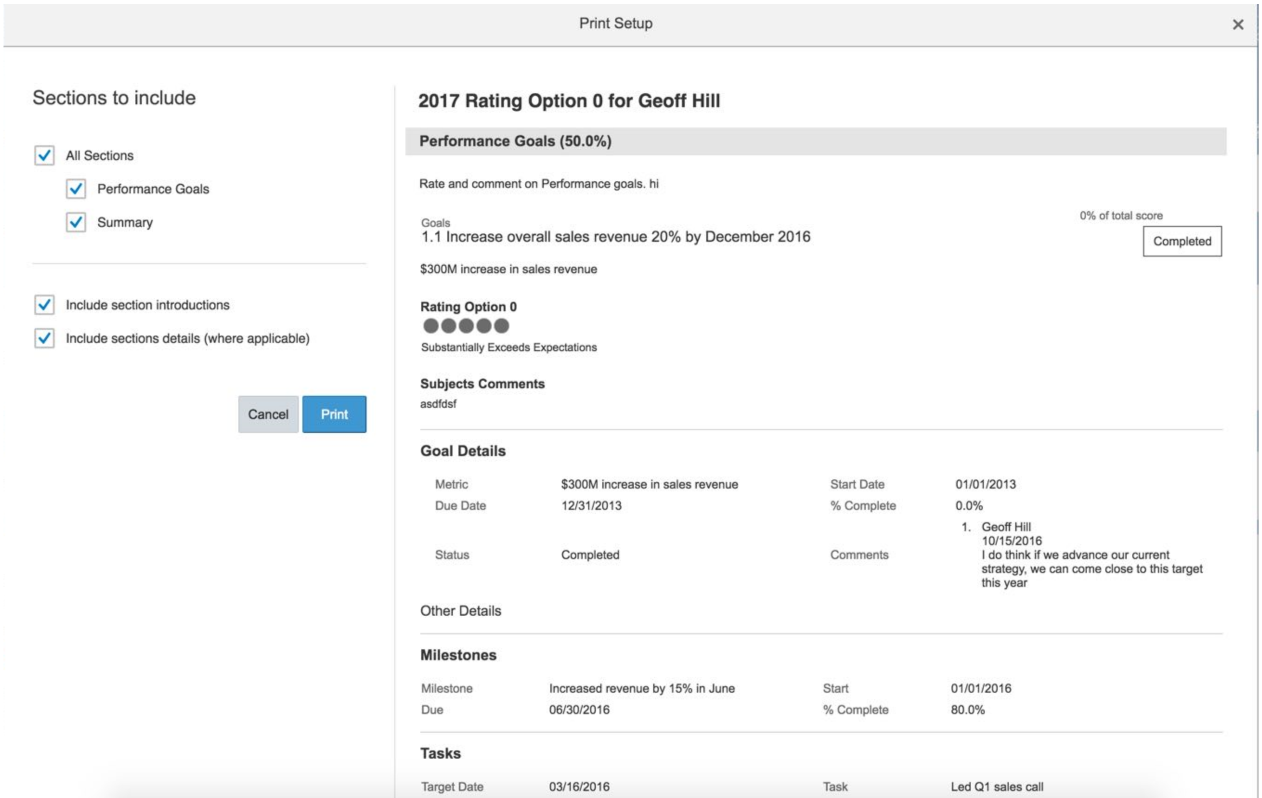
> **Note**
>
> On the Peformance Management form, the ratings in the competency section are displayed as *Rating by <employee name>* or *Official Rating*. However, in the PDF and Print version of the Performance form, the rating label is displayed as *Rating* and is not followed by the employee name.

For some rating options, the ratings which has been configured in the XML are displayed:

```
<rating-label>
<![CDATA[Rating]]>
</rating-label>
<rating-label-others>
<![CDATA[Rating]]>
</rating-label-others>
```

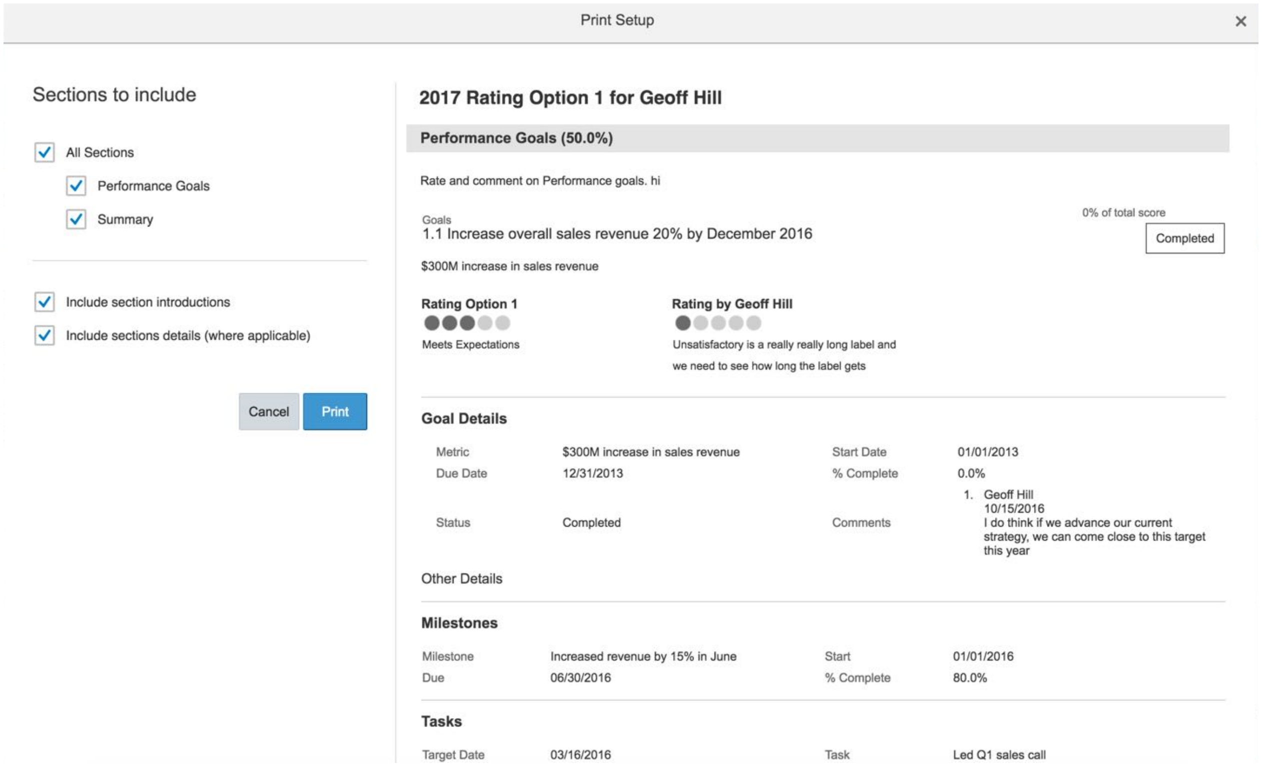
Where, *Rating Label = Rating of record/Official Rating* and *Rating Label Others = All other ratings*

Rating-opt=0



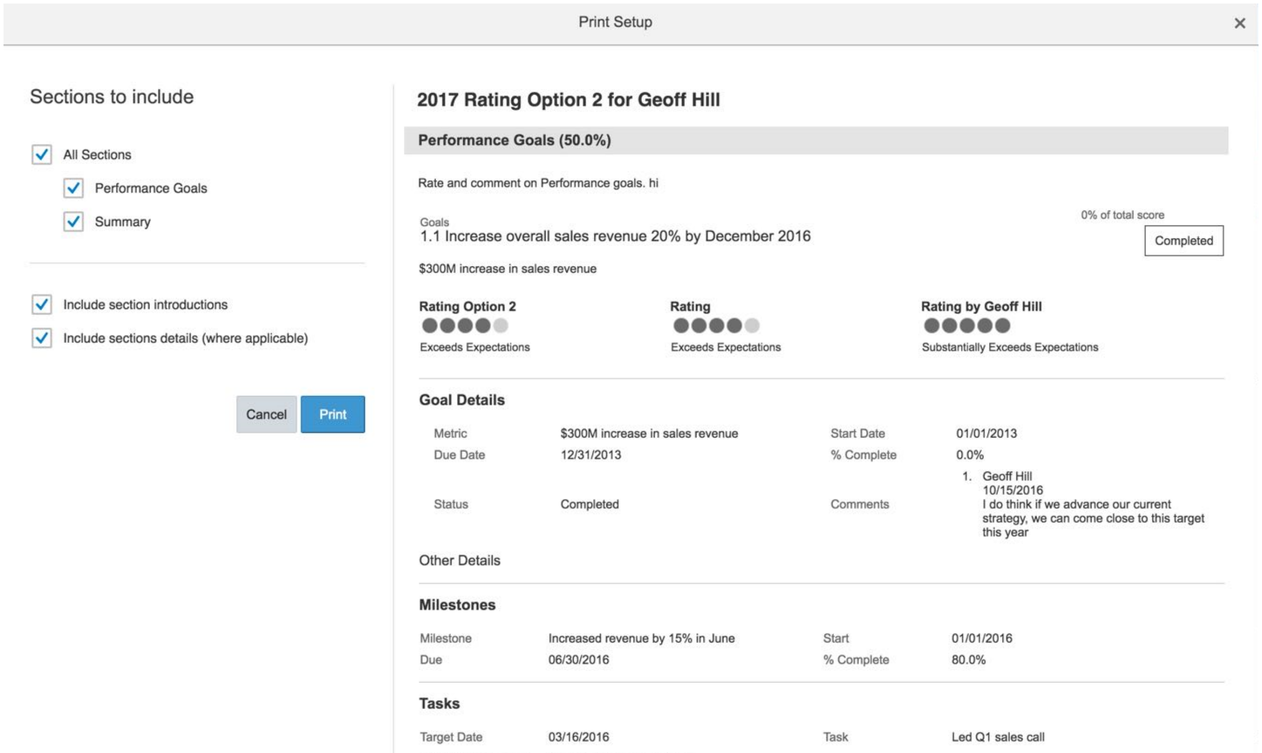
- Only shows one rating scale in PDF and Print version since all users with permission update the rating of record also know as the official rating.
- Uses rating-label

Rating-opt=1



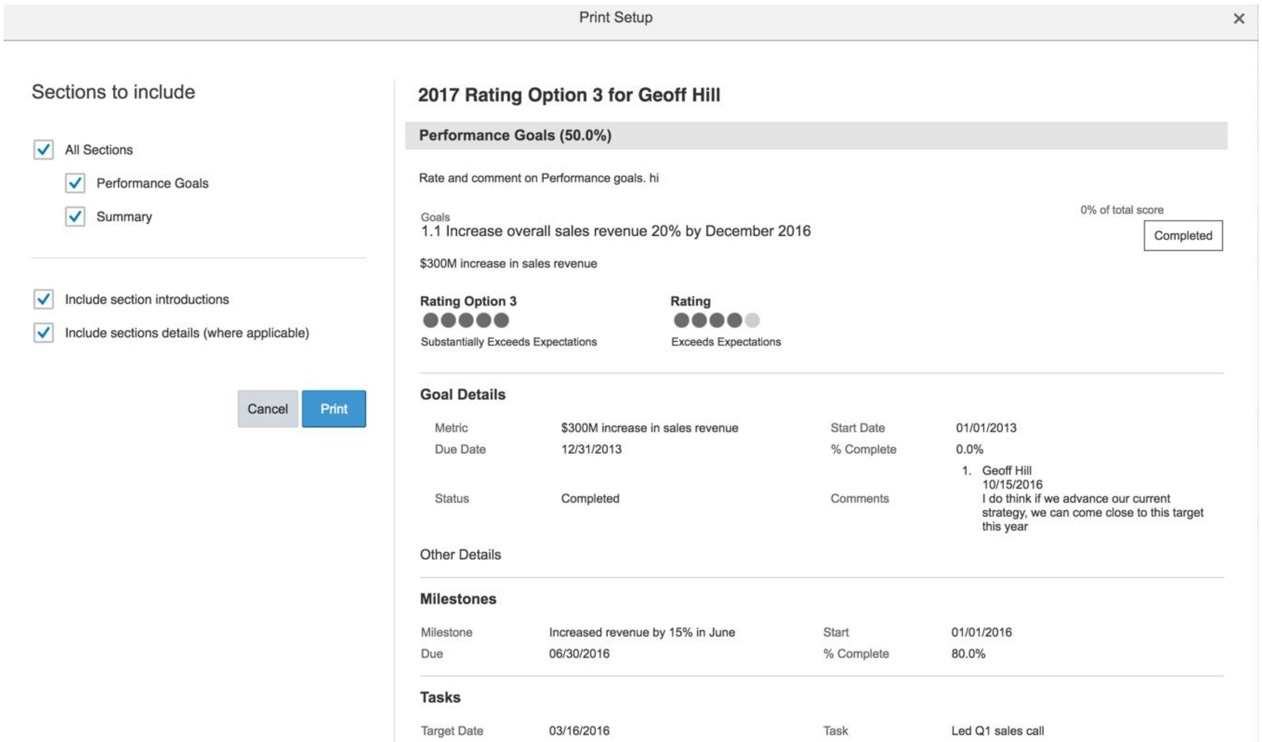
- Uses [rating-label] for official rating
- Users [rating-label-others by USER] for other ratings

Rating-opt=2



- Uses [rating-label] for official rating
- Users [rating-label-others by USER] for other ratings

Rating-opt=3



- Uses [rating-label for official rating
- Users [rating-label-others] for subject rating

10.5 Configuring Desired Field and Section Permissions: Advanced Options

You can configure field permissions and section permissions for a Performance Template using the Show Advanced Options in Manage Templates.

Prerequisites

To access the Advanced Configuration Options on the Manage Templates page, go to *Admin CenterManage Permission Roles[Permission Role]PermissionAdministrator Permissions*, and enable *Comprehensive template configuration for PMv12*.

Procedure

1. To set the Field permissions, go to *Admin Center* ▶ *Manage Templates* ▶ *[Performance Form]* ▶ *Show Advanced options* ▶, and click *Field Permission(s) defined. Click to modify*.

   In the *Field Permissions* dialog box, add field permissions for any one of the following: Section Comments, Item Ratings, Unofficial User Ratings, Section Weights, Item Weights, Subject Rating or Item Comments, to hide or to show them to all or specific role as desired. Also, select the Route steps for which this permission is applicable.

   > **Note**
   >
   > It is important to be careful of which owner role you choose. Please note that Owner Roles only apply for Section Comments. If you want the E role to see neither the EM's rating nor that of the EX role, you have to reach out to the SAP Cloud Support in order for them to grant *Other's Rating* tab permission to specific roles through backend configuration.
   >
   > Conversely, if you want the E role to see ratings and comments from some roles and not from others, include only the roles you want to hide in the "none" permission. There's no need to create an explicit permission to grant access—that is assumed by the system.

   You will want to indicate the route map steps in which you want to hide these fields, as anything that you desire the E role to see in the completed stage should not be hidden with a permission for all steps ("*").

   Finally, always be aware of the order of your permissions. These are read by the system from the top to the bottom, with each new line overriding any previous permission that it may conflict with.
2. To set the Section permissions, go to *Admin Center* ▶ *Manage Templates* ▶ *[Performance Form]* ▶ *Show Advanced options* ▶, and click *Field Permission(s) defined. Click to modify*.

   For example, add a section permission for the Summary Section to hide or show it to the E role as desired.

   For the section permission as well, you will want to indicate the route map steps in which you want to hide the section, as anything that you desire the E role to see in the completed stage should not be hidden with a permission for all steps ("*").
3. If you are enabling the Out of Turn access feature in PM v12, make sure that you have properly set permissions to view ratings and comments. If other users are not supposed to see the manager's ratings and comments that are entered while using Out of Turn access, you should use field permissions to hide them.

Task overview: Configuring Templates Using Admin Center [page 108]

Related Information

Managing Templates [page 108]
Configuring the Template: General Settings [page 110]
Fields and Sections [page 131]
Rating Options [page 156]
Configuring Custom Roles Using Manage Templates [page 167]

10.6 Configuring Custom Roles Using Manage Templates

You can configure roles to view or modify various sections or fields in a Performance Management template, by granting or denying permissions. You can also configure roles to add or remove items from a Performance Management template.

Prerequisites

To access the Advanced Configuration Options on the Manage Templates page, go to *Admin CenterManage Permission Roles[Permission Role]PermissionAdministrator Permissions*, and enable *Comprehensive template configuration for PMv12*.

Context

Performance Management v12 Acceleration automatically grants all permissions to all users when no specific permissions have been configured. However, you configure *Custom* roles using *Manage Templates* to grant view and edit permissions to specific roles.

Procedure

1. To configure **Field permissions** for a specific role in a Performance form, go to *Admin Center* > *Manage Templates* > *[Performance Form]* > *Show Advanced options*, and click *Field Permission(s) defined. Click to modify*.

   On the *Field Permissions* dialog box, select *Custom* Roles and enter the comma separated Custom Roles for which this permission is applicable. Custom Roles start with 'E' followed by any of these roles 'M', 'X', 'A', 'H'. For example: EMMM, EA or EA, EH, and so on.
2. To configure **Section Permissions** for a specific role in a Performance form, go to *Admin Center* > *Manage Templates* > *[Performance Form]* > *Show Advanced options*, and click *Section Permission(s) defined. Click to modify*.

   On the *Section Permissions* dialog box, select *Custom* Roles and enter the comma separated Custom Roles for which this permission is applicable.
3. You can select *Actions Permission(s) defined. Click to modify* in *Admin Center* > *Manage Templates* > *[Performance Form]* > *Show Advanced options* to configure custom roles to add or remove items from the Performance template.
4. Similarly, you can select *Required Field Permission(s) defined. Click to modify* to edit and modify mandatory fields in the Performance template.

Task overview: Configuring Templates Using Admin Center [page 108]

Related Information

Managing Templates [page 108]
Configuring the Template: General Settings [page 110]
Fields and Sections [page 131]
Rating Options [page 156]
Configuring Desired Field and Section Permissions: Advanced Options [page 165]
Roles [page 51]

11 Additional Configurations

After you have configured Form Template Settings, you need to define the rules to handle document changes and transfers. Also configure email notifications, configure permissions for reporting and enable or disable various Performance Management Features.

11.1 Required Fields

Required fields or mandatory fields are details that you must fill before the submitting a form.

If a required field is configured for a particular section, the field appears with an asterisk sign under the section in the form. You must fill in the details of the required fields before submitting a form. You will not be able to move the form to the next step without filling the required field details.

Note

You can set multiple fields as required fields for a particular section.

You can configure required fields for the following sections of the Performance form:

- Goals Section
- Competency Section
- Performance Potential Summary Section
- Goal Competency Summary Section
- Summary Section
- Signature Section
- Custom Section

You can configure the required fields from *Admin Center* > *Manage Templates* > *<form>* > > *Required Field Permission(s) defined. Click to modify*.

You can also configure the required fields using XML from *Provisioning*.

Remember

As a customer, you do not have access to Provisioning. To complete tasks in Provisioning, contact SAP Cloud Support.

11.1.1 Configuring Required Fields

You can configure required fields in the Performance form by adding the field and granting the required field permissions to the intended user roles at specific steps in the route map.

Procedure

1. Go to *Admin Center* > *Manage Templates* , and select a form template.
2. Select the section in which you want to configure required fields, click *Show Advanced Options*, and select the link for modifying the required field permissions.

   The *Required Field Permissions* dialog box appears.
3. Click the *Add Another* link and configure the following:
   - In *Send Action* select the route map step to which the form will be routed only after the required fields have been populated.
   - Select the *Roles* for which the fields will be made mandatory in the Performance form.
   - Select the *Route Steps* at which the fields will be made mandatory in the Performance form.
   - Click *Add Field*, and select the *Field* that you want to set as mandatory in the given section.

   > Note
   >
   > Using the *Add Field* link you can set multiple fields as mandatory.
4. Click *Done* and on the form template, click *Save*.

Results

You have successfully configured required fields for a given section in the Performance form.

11.2 Custom Fields

You can use Custom fields to add additional information in the Performance form. For example, if your processes dictate that the employee should be able to record an overall score, but the solution does not offer such a field. In such a scenario users may create a custom section that includes a custom field. The custom field can then be used by the employee to record his manual overall score.

> Note
>
> Custom fields are be rendered vertically as stacked fields, it is not possible to layout custom fields side-by-side on the same line). In a custom section, custom fields appear only once in the entire section. In an objective or competency section, custom fields will appear only once below each objective and competency listed in the section.

[Configuring Custom Fields [page 171]]

You can use *Manage Templates* to create and configure Custom fields within a custom section, objective section, or competency section.

11.2.1 Configuring Custom Fields

You can use *Manage Templates* to create and configure Custom fields within a custom section, objective section, or competency section.

Procedure

1. Go to *Admin Center* > *Manage Templates*, and select a form template.
2. Select the section in which you want to configure custom fields, click *Show Advanced Options*, and select *Custom Element(s) defined. Click to modify.* link for modifying the custom elements.

   The *Custom Elements* dialog box appears.
3. Click *Add Another* to configure the Custom field data type that is to be displayed in the custom section, objective section, or competency section.

   When displaying data from the Employee table make sure you specify the corresponding data type.
   - Label: a label in bold text
   - Text: one-line text area
   - Text Area: multi-line text box that can have legal scan and spell check
   - Date: a data type
   - List: drop-down lists
   - Integer: a data type
   - Double: a data type
   - Checkbox: a checkbox labeled item

   Depending on the custom element type you selected, you need to configure the following custom element. Refer the table below for the different parameters and their descriptions.

Label	Name	Provide the name of the Label that you want to display. to identify the Label
Text	Minimum Value	Enter the minimum number of characters allowed for the text field.
	Maximum Value	Enter the Maximum number of characters allowed for the text field.

	Editable during mass creation of forms	Selecting this option will allow you to edit the Text element during mass creation of forms.
	Name	Provide the name of the text field
	Value	Provide a default value of the text field
Textarea	Minimum Value	Enter the minimum number of characters allowed for the text field.
	Maximum Value	Enter the maximum number of characters allowed for the text field
	Writing Assistant	Select this option to activate
	Mime Type	Select the nature and the format of the text area.
	Editable during mass creation of forms	Selecting this option will allow you to edit the textarea element during mass creation of forms
	Name	Provide a name for the text area
	Value	Enter the default value for the textarea field
Date	Name	Provide a name for the date field
	Value	Enter the default value for the date field
List	Name	Provide a name for the List
	Custom Element's list's value type	Enter the value type for the list. For example, integer, text, and, so on.
	Custom Element's list's default name	
Integer Double	Name	Provide a name for the Integer or the Double element
	Value	Enter the default value for the type Integer and Double
	Maximum Value	Maximum value for the type Integer and Double
	Minimum Value	Minimum value for the type Integer and Double

Checkbox	Editable during mass creation of forms	Selecting this option will allow you to enable or disable the Checkbox element during mass creation of forms
	Name	Provide a name for the checkbox element
	Custom Element's title	If selected the title will appear on the right-side of the checkbox.

4. Click *Done* and on the form template, click *Save*.

Results

You have successfully configured custom element for a given section in the Performance form.

Task overview: Custom Fields [page 170]

11.3 Configuring Employee Change Engine

Enables you to define rules to handle document changes and document transfers, when the employee data changes.

The rules defined in the Employee Change Engine are applicable to the in-progress Performance Review and 360 Review forms when employee data changes.. These rules are currently triggered for:

- Manager Change
- Job code Change
- Location Change
- Matrix Manager Change
- HR Rep. Change

> **Note**
>
> The Change Engine supports the Performance Management v12 Acceleration forms, not the older versions.

.

11.3.1 Configuring Change Engine for HR Representative Change

Enables you to define rules to handle document changes and document transfers, when an employee HR Representative changes.

When an HR Representative (HR Rep) changes, it's an arduous manual process to transfer the volume of forms associated with that change. To handle the changes, the Employee Change Engine can now be configured to automatically transfer documents for an HR Rep change event.

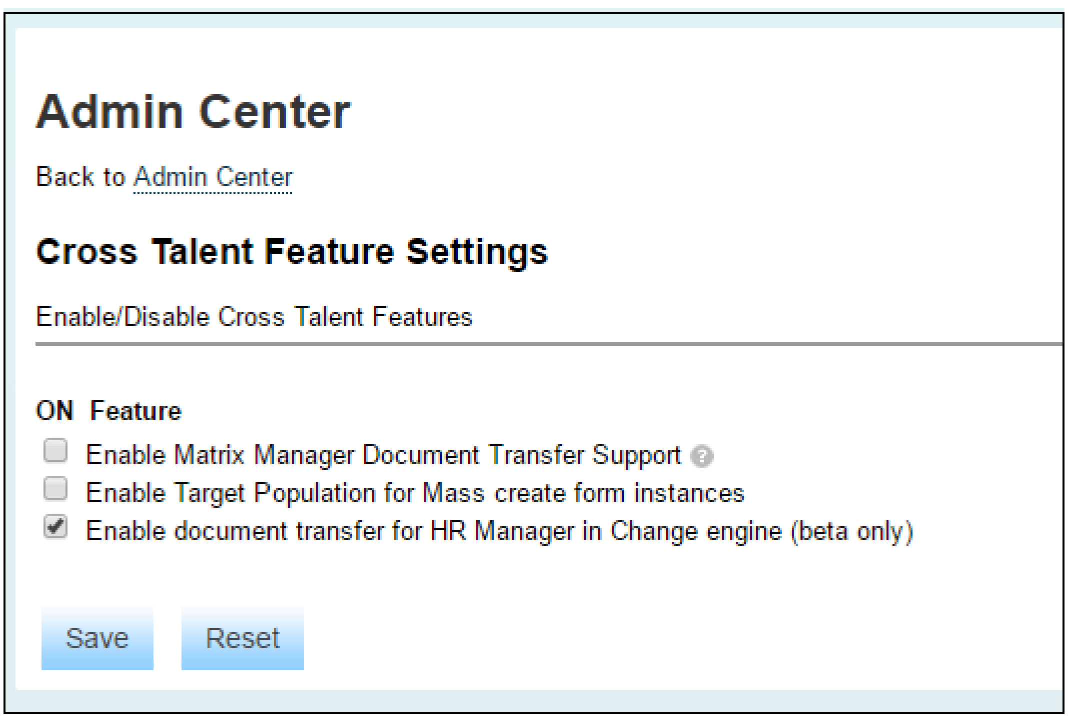
> **Note**
>
> Currently, we have the Beta version of HR Representative change rules defined for documents transfer in the Employee Change Engine tool.

Prerequistes

- Performance Management v12 Acceleration
- Enable the role-based permission: *Administrator Permission* > *Manage System Properties* > *Change Engine Configuration*

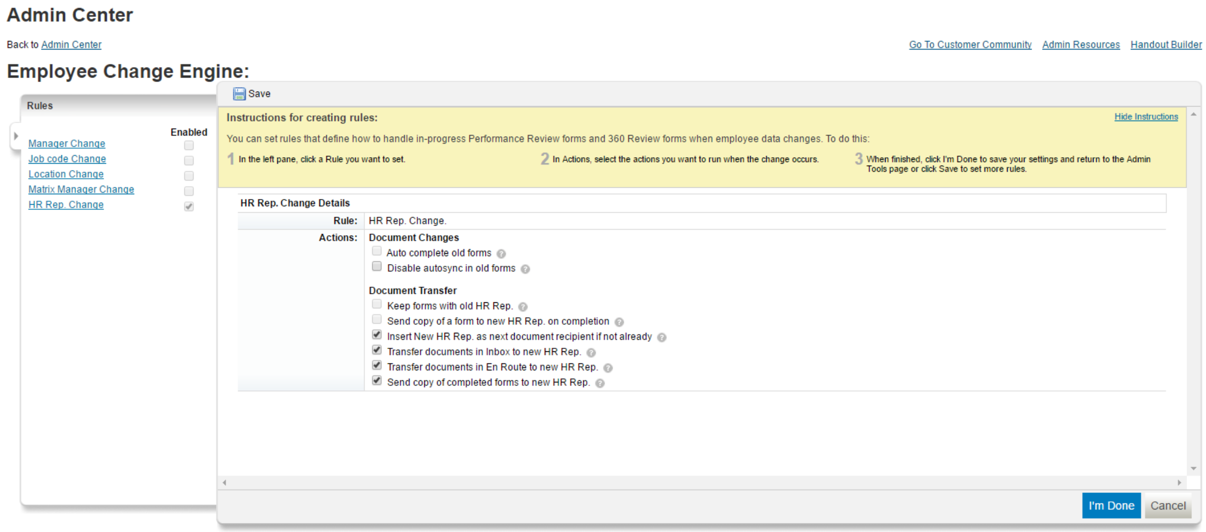
Configuring HR Rep. Changes Rule in Employee Change Engine

To make the HR Rep. Changes rule available in Employee Change Engine, go to *Admin Center* > *Cross Talent Feature Settings*, and enable *Enable document transfer for HR Manager in Change engine (beta only)*.



After activating the feature, you can now configure the HR Rep. Change rule in the Employee Change Engine as follows:

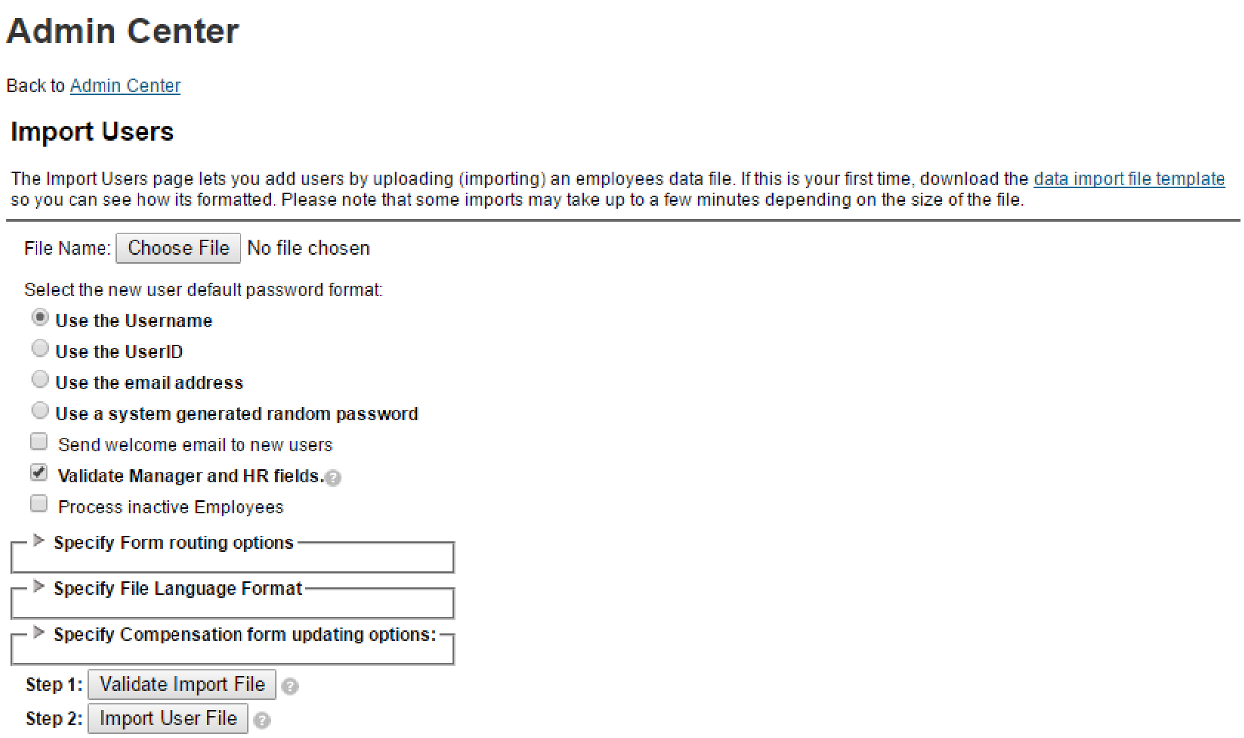
1. Go to *Admin Center* > *Employee Change Engine* .
2. Select the *HR Rep. Change* rule, and select the actions you want to apply on the In Progress, the En Route and the completed Performance Management v12 Acceleration forms, when the HR representative changes.



3. Click *I'm Done*.

You have successfully configured the HR Rep. Change rule in the Change Engine.

You can test this feature while importing employee data using the *Employee Import* tool in *Admin Center*. The change engine rules will be triggered automatically, if the employee data has any HR Rep. changes. Also, you will not have to specify any Form Routing options.



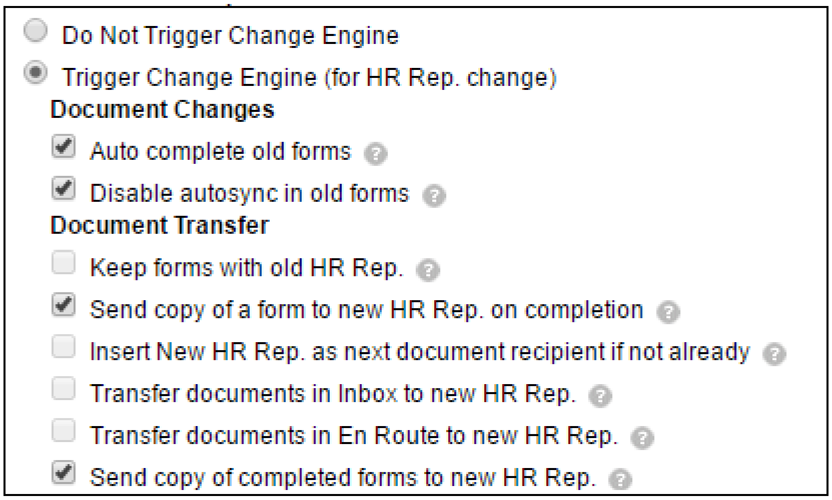
> **Note**
>
> The document trasnsfer and change engine rules are supported in the *Employee Import* tool, available on application instances for which *Employee Central* is not enabled.

Overriding the HR Rep. Change Rules within Individual Form Templates

You can also maintain the HR Rep. Change actions, for individual form templates, using *Form Template Settings*. You can define the document change behavior for a specific template, without altering system-wide settings in the Change Engine, as follows:

1. Go to *Admin Center* > *Form Template Settings*, and select a form template for which you want to redefine the HR Rep Change rules. The *Managing Form Templates* page appears.

2. Select *Trigger Change Engine (for HR Rep. change)*. The HR Rep. Change related actions, grouped under *Document Changes* and *Document Transfer* become active for the selected template.



3. Select the actions you want to configure for the selected template, and at the bottom of the page, click *Update Form Template*.

You have successfully configured a different HR Rep. Change rule for the selected form template.

11.4 Configuring e-mail Notifications

You can configure Performance Management notifications, such that you receive them on your mobile app, on the web application (the "To Do" tile on your home page), and through e-mails.

Context

The e-mail notifications can be turned on and off. When any of these e-mail notifications are enabled, users will receive a notification when the related actions occur.

Procedure

1. To configure e-mail notifications, go to *Admin Center*, and in the *Tools Search* field, enter *Email Template Notification*. The *E-Mail Notification Templates* page appears.
2. Select the e-mail notification, and review the default e-mail template on the right half of the page. You can update the e-mail template, if you want to.
3. Set the interval for sending out consolidated e-mail, by selecting the default notification interval from the *Interval For Consolidated Emails (In Hours Starting From 12:00am):* dropdown list at the bottom of the *Email Template Notification* page.
4. Click *Save Notification Settings*. You have successfully enabled the e-mail notifications.

11.4.1 Understanding Consolidated e-mail Notifications

You can use this feature to send out consolidated notifications for the same recipient into one single e-mail at specific time intervals.

There are jobs running in the background that are responsible for sending out the consolidated e-mail notifications to the users. These jobs are configured from Provisioning. Make sure these jobs are configured correctly.

> **Remember**
>
> As a customer, you do not have access to Provisioning. To complete tasks in Provisioning, contact SAP Cloud Support.

To understand the concept of sending out consolidated e-mail better, let us consider the following example:

Suppose for a user, one form was routed at 11:16, one at 11:48 and one at 12:05, and the job in provisioning is configured to run at 12:10. This job will process all the e-mails that were sent in the last one hour (from 11:10 to 12:10) and will send the consolidated e-mail to the users.

You can configure the consolidated interval from the *Email Template Notification* page and from the *Customize Settings for Form Templates* dialog box:

- Using *"Interval For Consolidated Emails (In Hours Starting From 12:00am):"* setting on the *Email Template Notification* page:
  For e-mail notifications listed on the *Email Template Notification* page that do not have the option to set up a customized interval, you can select the default interval from the *Interval For Consolidated Emails (In Hours Starting From 12:00am):* drop down menu, at the bottom of the *Email Template Notification* page.

  > **Note**
  >
  > Here you are selecting the time interval (in hours). For example, if you select 6 from the dropdown menu, consolidated e-mail notifications will be sent out every 6 hours.

- Using *"Consolidated & Interval "* setting on the *Customize Settings for Form Templates* dialog box:
  You can also select customized consolidated interval for the e-mail notifications used in Performance Management from the *Customize Settings for Form Templates* dialog box.

  > **Note**
  >
  > The interval that you add under Customize Settings for Form Templates takes precedence over the interval specified in the E-Mail Notification Templates page.

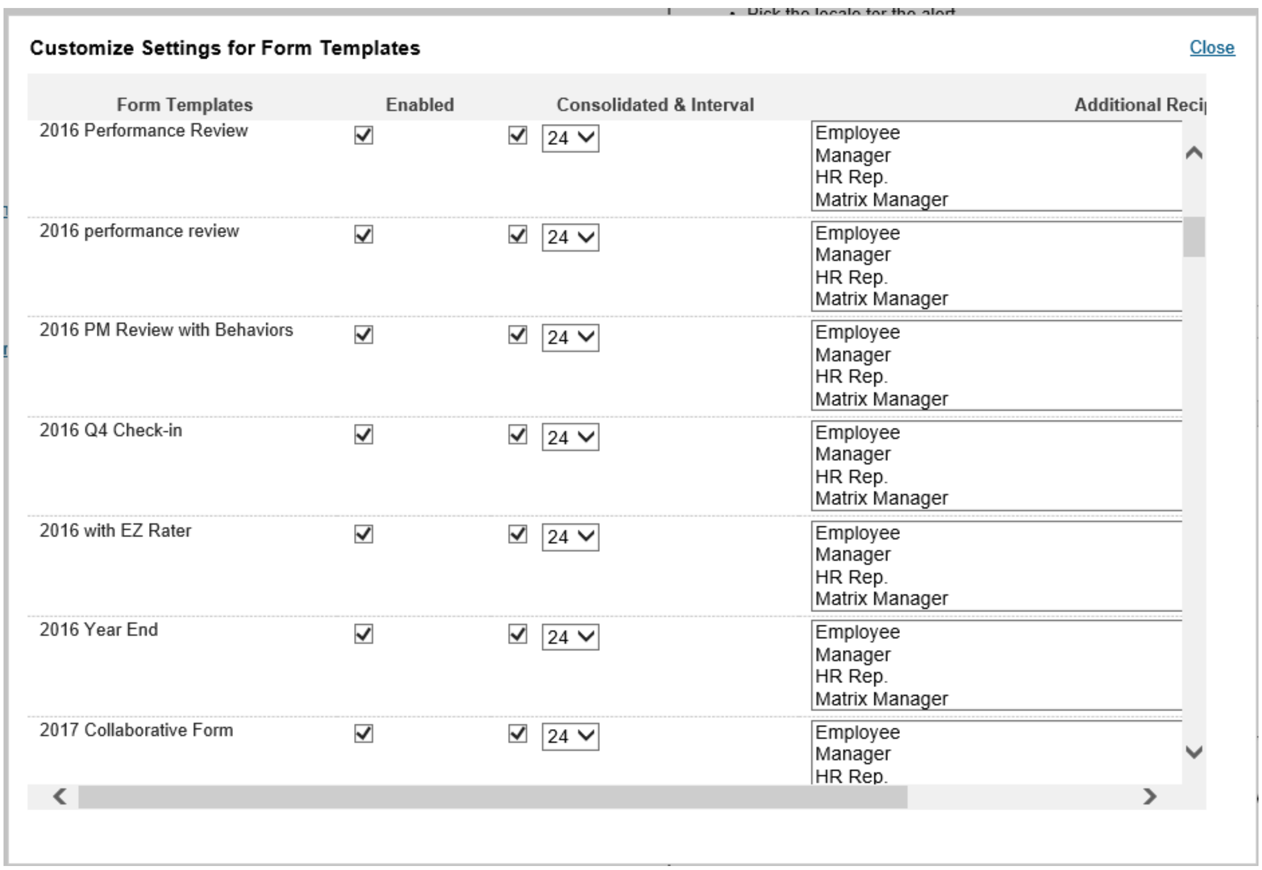
Parent topic: Configuring e-mail Notifications [page 177]

Related Information

Customizing Settings for Form Templates [page 179]
List of E-Mail Notifications in Performance Management [page 180]

11.4.2 Customizing Settings for Form Templates

You can enable a particular notification and customize the settings for one or more form templates from the *Customize Settings for Form Templates* dialog box.



1. Go to Admin Center > E-Mail Notification Templates.
2. Select a notification by clicking on the <Notification> link.
3. Click *Customize Settings for Form Templates*, to customize the settings for one or more form templates.
4. Set the following from the *Customize Settings for Form Templates* dialog box:
   - *Enable* the *Form Templates* by selecting the checkbox.
   - Select the Notification interval from the *Consolidated & Interval* drop down list. Let us consider that you want to set *Document Routing Notification* for Performance Review forms, and you have selected 24 hrs as

the interval. Every 24 hrs you will receive a consolidated document routing notification for all the documents that got routed in the last 24 hrs for the "Performance Review" form template.
   - You can also send notifications to additional recipients by selecting suitable roles under *Additional Recipients*.

Parent topic: Configuring e-mail Notifications [page 177]

Related Information

Understanding Consolidated e-mail Notifications [page 178]
List of E-Mail Notifications in Performance Management [page 180]

11.4.3 List of E-Mail Notifications in Performance Management

You can use this page to edit notification templates.

The email notifications can be turned on/off. When any of these Email notifications are enabled, users will receive a notification when the related actions occur.

E-Mail Notification	Descriptions
Document Creation Notification	Document creation notification will be sent to the user whose form has been created Recipients: All the current step owners in the Route Map, who will receive the form in their Inbox. Note You can set the notification for one or more form template on *Customize Setting for Form Templates*

E-Mail Notification	Descriptions
Document Routing Notification	Document routing notification will be sent to the users when a form instance is availble in their Inbox. Recipients: All the current step owners in the Route Map, who receive the form in their Inbox. **Note** You can set the notification for one or more form template on *Customize Setting for Form Templates*
Document Reject Notification	Document reject notification will be sent to the users when a form instance is re-jected in the Signature stage. Recipients: **Note** You can set the notification for one or more form template on *Customize Setting for Form Templates*
Document Completed Notification	Document completed notification will be sent to the users when the form is com-pleted. Recipients: You can choose the users in the Settings. **Note** You can set the notification for one or more form template on *Customize Setting for Form Templates*

E-Mail Notification	Descriptions
Document Forward Notification	Document forward notification will be sent to a user when a completed form instance is forwarded to the other's Completed folder. Recipients: The user to whom you have forwarded the copy of form. **Note** You can set the notification for one or more form template on *Customize Setting for Form Templates*
Document Routing Step Exit Notification	Document routing step exit notification will be sent to the selected recipient(s) when a routing step is completed. You can select this notification for Document Routing or Document Completed, both of them offers the following options: • Step Exit Notification Only • Document Notification Only • Both Step Exit and Document Notifications Recipients: All the current step owners in the Route Map, who receive the form in their Inbox.
Document Deletion Notification	Document deletion notification will be sent to a user when a form instance is deleted. Recipients: You can choose the users in the Settings. **Note** You can set the notification for one or more form template on *Customize Setting for Form Templates*

E-Mail Notification	Descriptions
Document Due Notification (used in Performance Management)	Document due notification will be sent to the users when the due date is scheduled several days later. The number of days at which this notification can be triggered can be set in the Form Template Settings. Recipients: All the current step owners in the Route Map, who receive the form in their Inbox.
Document Late(overdue) Notification (used in Performance Management)	Document late notification will be sent to the users when the due date has already passed. The number of days at which this notification can be triggered can be set in the Form Template Settings. Recipients: All the current step owners in the Route Map, who receive the form in their Inbox.
Step Due Notification (PM own)	This notification will be sent to the users when the due date to complete a particular step in the Route Map is scheduled several days later.
Step Over Due Notification (PM own)	This notification will be sent to the users when the due date to complete a particular step in the Route Map has already passed.

Note

You can send *Disabled User Notification* and customize *Email Template Alerts* from this page.

Disabled User Notification will be sent when a user is deactivated and there are documents to be completed in their Inbox. The email will go to the person initiating the data upload that deactivated the user.

Parent topic: Configuring e-mail Notifications [page 177]

Related Information

Understanding Consolidated e-mail Notifications [page 178]
Customizing Settings for Form Templates [page 179]

11.5 Configuring Permissions for Reporting

Detailed Document Search

By default, *Detailed Document Search* disregards permissions and includes all fields, however, an administrator can require DDS to obey permissions when displaying fields by selecting the *Enforce permissioning for Detailed Document Search & Archive & Print Reporting* option in the *Form Template Settings* interface.

This option controls the form to be included in the Detailed Document Search and Archive and Print reports.

Archive and Print

The same setting enables the archive and print report to obey permissions for the logged-in user as well.

Form Info Page

You can choose to make step comments available to all Collaborative Step participants via the Form Info page.

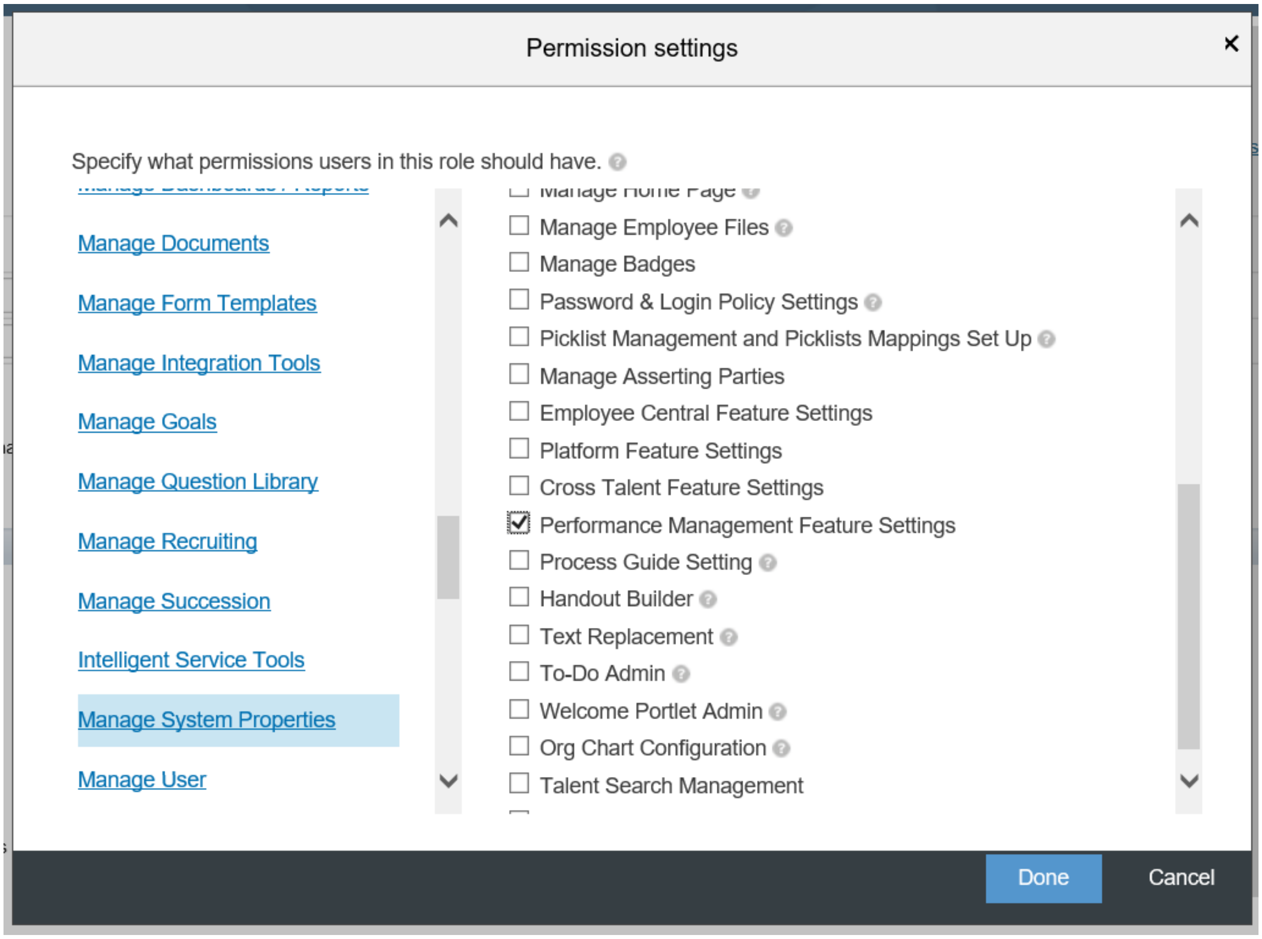
To configure:

1. Enable the flag *Allow exit step comments to be visible to all participants in a Collaborative (C) Step (only applicable for forms that have not progressed beyond the C Step)* in the form template settings page.
2. Enable the *Comments* token in the Email notification template (Document Routing Notification template), and enable *Routing Notification.*

11.6 Performance Management Feature Settings

Performance Management Feature Settings allows you to enable and disable various Performance Management Features.

You need to enable "Performance Management Feature Settings" permission for the selected role via role-based permissions (RBP).



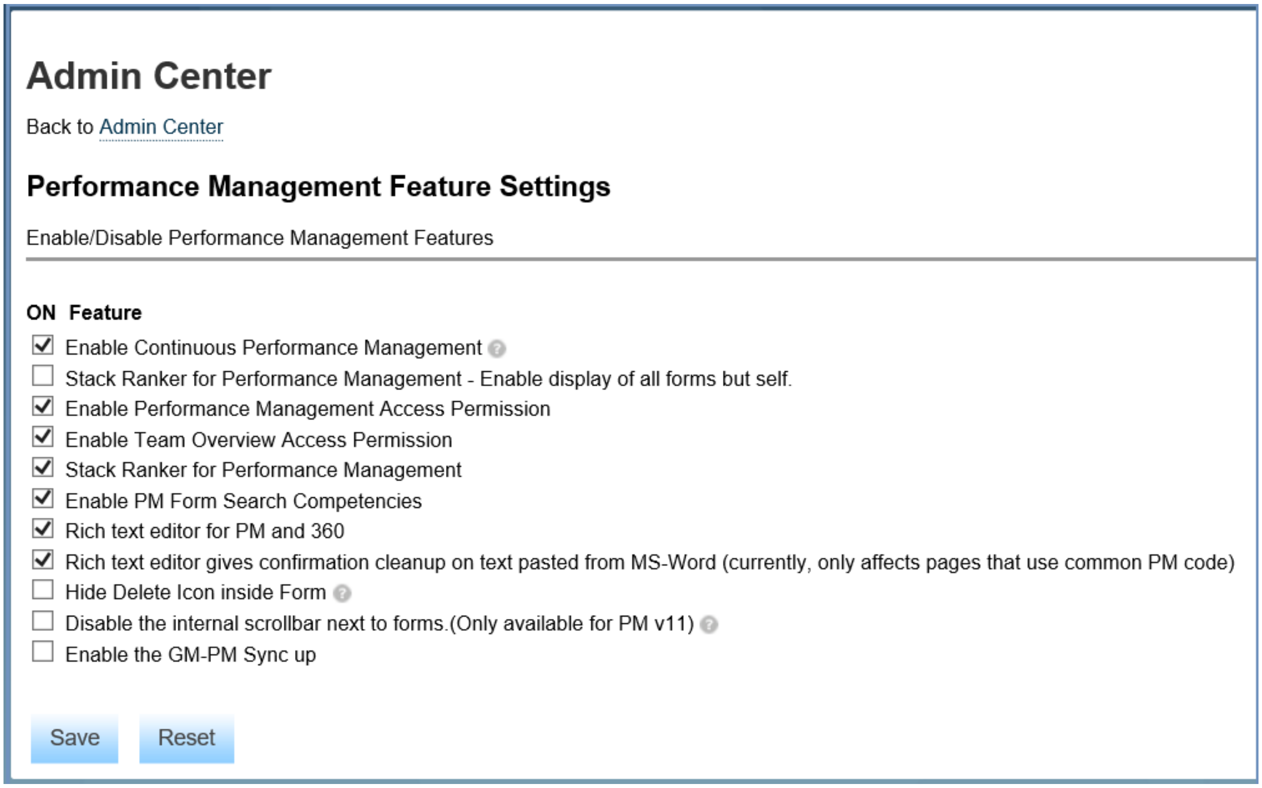
- Go to *Admin Center* > *Manage Permission Roles*, select the role and enable the *Manage system properties* > *Performance Management Feature Settings* permission for the selected role.

11.6.1 Self-Enable Features

Performance Management administrators can enable various features via the Admin Center without the involvement of SAP Cloud Support.

You can enable the features using the *Admin Center* > *Performance Management Feature Settings* page.

After you enable these features, only the users with appropriate role based permissions will have access to them.



Feature Description

- **Enable Continuous Performance Management**: This feature enables users to get quick feedback on work through frequent and structured conversations with manager. It help managers track their team members' progress effortlessly and offers a simple way to provide coaching advice. To enable this feature you need to have Generic Objects and Role Based Permission features.
- **Stack Ranker for Performance Management - Enable display of all forms but self**: Controls whether or not Team Rater (aka Stack Ranker) can be used by raters other than the Direct Manager. When enabled, other raters such as the Matrix Manager or the EMM, can rate a user using Team Rater.
- **Enable Performance Management Access Permission**: Performance Management Access Permission is a feature that allows customers to hide the Performance tab from employees using role based permissions.

> **Caution**
>
> - The *Performance Management Access* role based permission is displayed only when *Enable Performance Management Access Permission* option is enabled in Provisioning.
>
>   > **Remember**
>   >
>   > As a customer, you do not have access to Provisioning. To complete tasks in Provisioning, contact SAP Cloud Support.
>
> - Once the provisioning switch is enabled, a new role based permission *Performance Management Access* will be available in the instance and will be disabled by default.

- Since the permission has been added and is disabled by default, users who do not have any PM or 360 forms will no longer see the *Performance Management* tab. This is expected behavior but can be quickly remedied by enabling the permission for users who should have access.

While this permission can be used to disable access to the Performance tab, it is important to note that users who have Performance Management or 360 Forms in their inbox folders, will continue to see the Performance tab even without Performance Management Access permission. If this is the case for the user, the only way to hide the *Performance* tab is to delete all the forms in their folders.

- **Enable Team Overview Access Permission**: Checking this flag enables the manager to access the performance status summary of the direct reports on the Team Overview page.
- **Disable the internal scroll bar next to forms (PM v11 Only)**: Checking this flag disables the internal scrollbar but enables the browser scroll bar. Conversely, unchecking this flag enables the internal scroll bar but disables the browser scroll bar.
- **Hide Delete Icon inside form**: Enabling this flag removes the delete button from inside the form if the delete button is enabled in Form Template Settings. It is still visible from the Inbox view.
- **Enable Team Rater for Performance Management**: Enables the team rater (stack ranker) feature. Team rater allows raters to quickly review the rating for those they are evaluating and visualize how subjects compare with or stack up against one another.
- **Enable PM Form Search Competencies (PM v11 Only)**: By enabling this feature, when the user is in the competency section, he can search for any competency beyond those associated with his job role.
- **Rich text editor for PM and 360**: Enables RTE for both PM and 360 modules. An online rich-text editor allows users to edit rich text and presents a what-you-see-is-what-you-get (WYSIWYG) editing area.
- **Rich text editor gives confirmation cleanup on text pasted from MS-Word**: Provides an option to users to override the universal functionality of automating the text cleanup from MS-Word.

> **Note**
>
> With Internet Explorer 11, when copying from MS Word to IE –the clean-up is handled automatically by the browser and but is not confirmed.

Non-RBP customers can configure to the limit access of this page to admins. If RBP is enabled, make sure that the admin role has the permission to visualize the link to access the feature settings page.

1. *Admin Center* > *Manage Permission Roles*
2. Enable the *Manage system properties* > *Performance Management Feature Settings* permission for the selected role.
3. Log in again. The link and access to the page are available in the Admin Center

11.7 Configuring Performance History Portlet in People Profile

You can configure Performance History Portlet to display the performance ratings of the employees in people profile.

Prerequisites

You need to first define the rating scale for the Process.

Go to *Admin Center* > *Processes and Forms*, create, or edit an existing process and select the form templates that you want to show in the portlet. Select the rating scale that you want to use in the portlet from the *Rating Scale for Dashboard* dropdown menu.

Procedure

1. Go to *Admin Center* > *Configure People Profile*, under *Scorecard* select *Performance History*.
2. You can choose how you want to display the performance ratings of the employees by selecting any one of the following from the *Show Ratings as:* dropdown menu:
   - Normalized Rating (Rounded)
   - Rating (Unrounded)
   - Normalized Rating (Unrounded)
   - Normalized Rating (Rounded) - Labels only
3. On the *Configure People Profile* page, click *General Settings* .
4. On the right panel, under *Talent Data Settings*, set the date range and select the process from the dropdown menu.

   Note

   Select the *Include in-progress forms* checkbox if you want to view the in-progress forms on the People Profile page.
5. Click *Save*.

Results

The performance ratings of the employee are displayed along with the Performance Review forms, within the configured date range and the process, in the Performance History section of the People Profile.

Note

The forms in Performance History section are sorted alphabetically in descending order.

12 Stack Ranker

The Team Rater, also known as Stack Ranker, allows raters to quickly review the ratings for those they are evaluating, and to visualize how the subjects compare with, or stack up against, one another.

The Stack Ranker enables managers to quickly identify top performers and to reward those who deserve extra recognition, or to quickly identify low performers. This feature goes beyond a 5-point rating scale and provides more granular details.

Stack Ranker is compatible with competencies, but not with behaviors.

How does SuccessFactors Stack Ranker work for a Manager?

- Stack Ranker displays your entire team side-by-side on a single page.
- The employees appearing in the stack is dependent upon the processes you as a Manager are involved with. Typically, this will show the Manager's direct reports. However, if you are involved in many processes (different route maps) then you may see people who are not your direct reports. Also, if you were part of the process originally, but had a manager change, you may see those for the process you were originally part of.
- Common team competencies or other performance criteria are listed on the page, too. As you rate each team member, the Summary area automatically displays the team in ranking order, with the order changing dynamically as you continue your assessment. When you're done, you'll see your team shown in the order of highest overall performer to lowest overall performer. You can then narrow the performance criteria, for example, you can select a single competency, and see how your team stacks up.

Accessing Stack Ranker

You can access the Stack Ranker from the following entry points:

- Team Overview page: The *Stack Ranker* button on the Team Overview page will appear once the form template has been configured using XML and from *Manage Templates*. For more information, refer to Configuring the Form Template for Stack Ranker [page 192]
- The ToDo list on the Home page: The purpose of showing Stack Ranker on the Home page was to allow Performance Management v11 users to access the Stack Ranker without opening the Performance Review form. This is because Performance Management v11 doesn't have Team Overview.
  With Performance Management v12 Acceleration, you can open Stack Ranker from the Team Overview page directly. Therefore, you can no longer access Stack Ranker from the ToDo list on the Home page.
- Competency and the Summary section: You can access the Stack Ranker from the Competency and the Summary section of a Performance Management form.

  > **Note**
  >
  > In order for a form template to be used in this section the form template must have only one and only one competency section in the form. Other sections are supported (objective, introduction, summary, and so on) but only one competency section is supported.

12.1 Enabling Stack Ranker

The Team Rater is turned on/off through Provisioning.

Enable Team Rater for each of the modules for which you want to be able to compare employees.

If you want the second-level manager to be able to view the Team Rater, select this option in Provisioning: *___Stack Ranker - Enable display of all forms but self*

The Stack Ranker can be accessed from any competency section on a Performance Management from. The Stack Ranker will only pull competencies for the direct reports that are in that competency section. The Stack Ranker uses the form template id from the opened performance review form which has stack ranker button. This means it cannot pull from another form such as a Mid Year review or last year's review as the other years will be using a different form template ID.

12.2 Configuring the Form Template for Stack Ranker

The Stack Ranker utilizes a Performance Management form template type as the back-end. For each direct report that is displayed on the Team Rater there is a Performance Management form for that employee.

Procedure

1. To enable a Performance Management form to be used with Stack Ranker you need to set a new form template XML element.

   The presence of the my-team-rater element, a sub-element of sf-pmreview indicates that the form is a MyTeamRater-enabled form.

   MyTeamRater access may be limited on a per-section basis using action permissions. See the action-permission element in the sf-form.dtd. A new refid attribute value my-team-rater will be used to identify action permissions for MyTeamRater.

   ```
   Example action-permission element:
       <action-permission type="none">
       <role-name>E</role-name>
       <action refid="my-team-rater" />
       <route-step stepid="*"/>..
       </action-permission>
   ```

   > **Note**
   >
   > You must set the sub-element <my-team-rater/> in the fm-meta section of a Performance Management form.

   Also, in addition to the XML attribute, the form must also have one of the summary sections configured. To configure a summary section, refer Summary-sect [page 275].

2. To enable Stack Ranker for a Performance Review form from the application, go to *Admin Center* > *Manage Templates* > *<Performance Form>* > *General Settings*, and select *Allow managers to stack rank employees on competency sections: Globally or Section by Section* option.

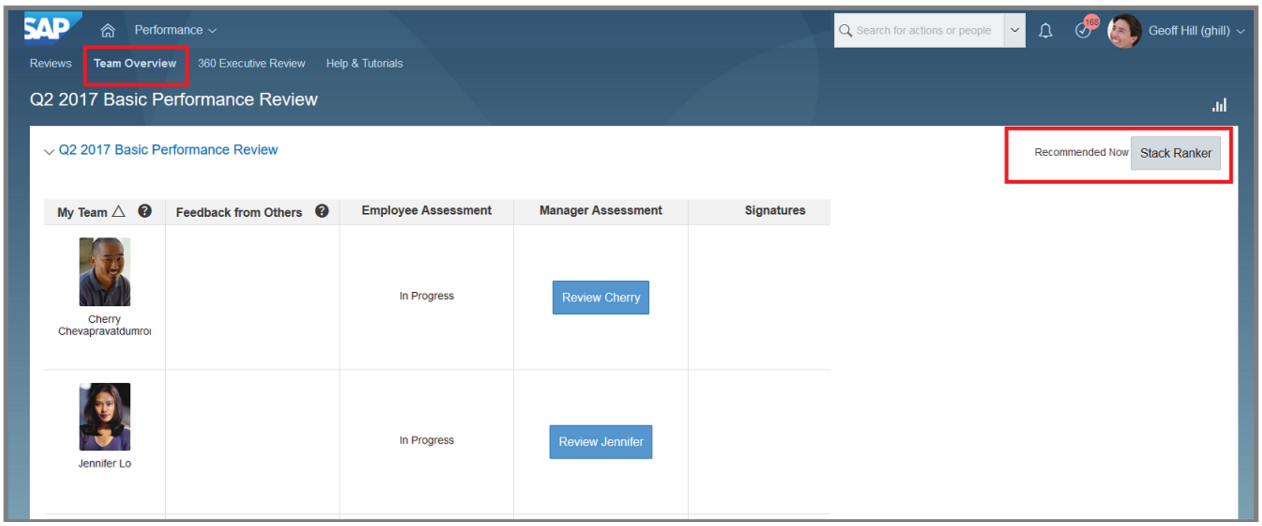
   > **Note**
   >
   > If the form has my-team-rater enabled in the XML, the character limit is 4,000 characters in the item comment and section comment fields. If Team Rater is disabled, the comment length is limited to the maximum number of characters that is configured using the XML metadata.

12.3 Using the Stack Ranker

You can use the Stack Ranker to enter or modify ratings, add notes and to view overall rating of the employees.

Context

You can access the Stack Ranker from the Team Overview page as shown below:

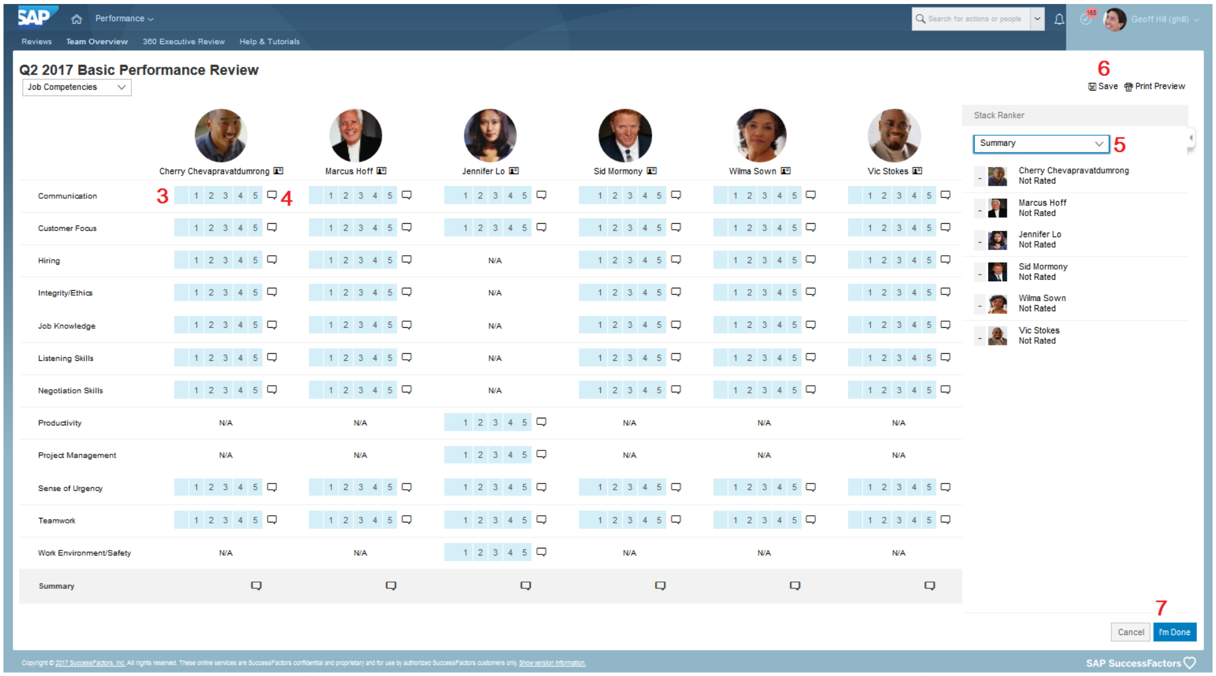


Procedure

1. To access the *Stack Ranker*, go to the home page, from the *Home* drop down, click *Performance*.

   The *Team Overview* page opens.
2. Click *Stack Ranker* to access the tool.

   The *Stack Ranker* page displays a list of employees and their competency ratings.



3. Use the ratings button to enter or change a competency rating.
4. Click 🗨 icon to add notes on reasons for the change.
5. Use the drop-down menu to view how employees rate overall or on a specific competency.
6. Click *Save* icon on top of the page to save changes.
7. Click *I'm Done* to return to the form. Ratings are automatically updated in the employees' performance review forms.

12.4 Rating Scale Styles Used in Team Rater (Stack Ranker)

Team Rater supports three different styles of rating scales. The system determines which style to display based on form and rating scale configurations.

Horizontal button with a scale. Show value	Horizontal button without a scale	Drop-down list
		

For the horizontal buttons, the rating description appears on mouseover.

A drop-down scale is used when any of the following conditions are met:

- The rating scale has more than seven entries
- Rating scale values are not positive integers less than 10 that is, from 0 to 9.

12.5 Customizing Stack Ranker UI Label Using Text Replacement

You can replace the term *Team Rater* in the application.

You can use this feature to replace the Stack Ranker UI label in the application with a UI label of your choise.

For example, you can replace *Stack Ranker* UI label in the application with *Team Rater*.

To do this:

Go to *Admin Center* > *Text Replacement* and type *Team Rater* in the *Replace With Text* field.

This will replace the Stack Ranker with Team Rater in the following places:

- The Stack Ranker button in the PM competency section of the form, which is used to access the Stack Ranker Page.
- The label in the right hand accordion panel of the Stack Ranker page.

Team Rater is a supported text replacement string in English, Spanish, and French Canadian. The other places that "*Team Rater* appears, such as in the *To Do List*, or form template name, can already be configured in other areas of the application.

12.6 Known Limitations

This section lists some of the known limitations that you will encounter while using Stack Ranker.

- Keep the route map for Stack Ranker very simple. The idea behind the Stack Ranker is to give managers a simple, quick, and easy way to stack rank their team. A route map with a single modification step for the EM and no signature step.
- When using the Stack Ranker, it is recommended that you configure the route map in such a way so that the manager can be ensured to have all the direct report forms in their Inbox at once, thus getting the full value. Start the route map with the EM, or enable the route map step due date auto routing to an EM step.
- Due to a limitation in functionality, there is no way to batch route forms to the next step in the Stack Ranker. It is recommended that you use the route map step due date auto send feature to move the Stack Ranker through the route map.
- Unless you want the overall Stack Ranker score to show up in Live Profile do not include a summary section in the form template. If you want the Stack Ranker to produce an overall competency score, then include an Objective-Competency summary section.
- The Stack Ranker supports job code populated competencies as well as hard coded competencies. To stack rank it is recommended to use hard coded competencies so that there is an even list of competencies that all direct reports will be evaluated on.

- The Stack Ranker competency section calculation supports item weights, but item weights are not displayed on the Stack Ranker page. We recommended you not to use item weights for the competencies as the manager might find it difficult to understand how the ratings add up in the summary calculation without seeing the item weights on the Stack Ranker page.
- There are limitations on how plain text comments are supported in Stack Ranker. Therefore, it is recommended that you enable the rich text editor (RTE) in the form template for Stack Ranker.
- As indicated above, if the client is rating by behaviors the Stack Ranker tool cannot be used.
- Also, when Stack Ranker is enabled for the Performance form, section comments and item comments in the Competency Section will allow maximum count of 4000 charaters/bytes. A warning message will be displayed when the user exceeds 4000 characters/bytes limit.

  Note

  In case of single byte languages 4000 bytes is around 4000 characters as each byte take up one character. For example, English, French, Italian, and so on.

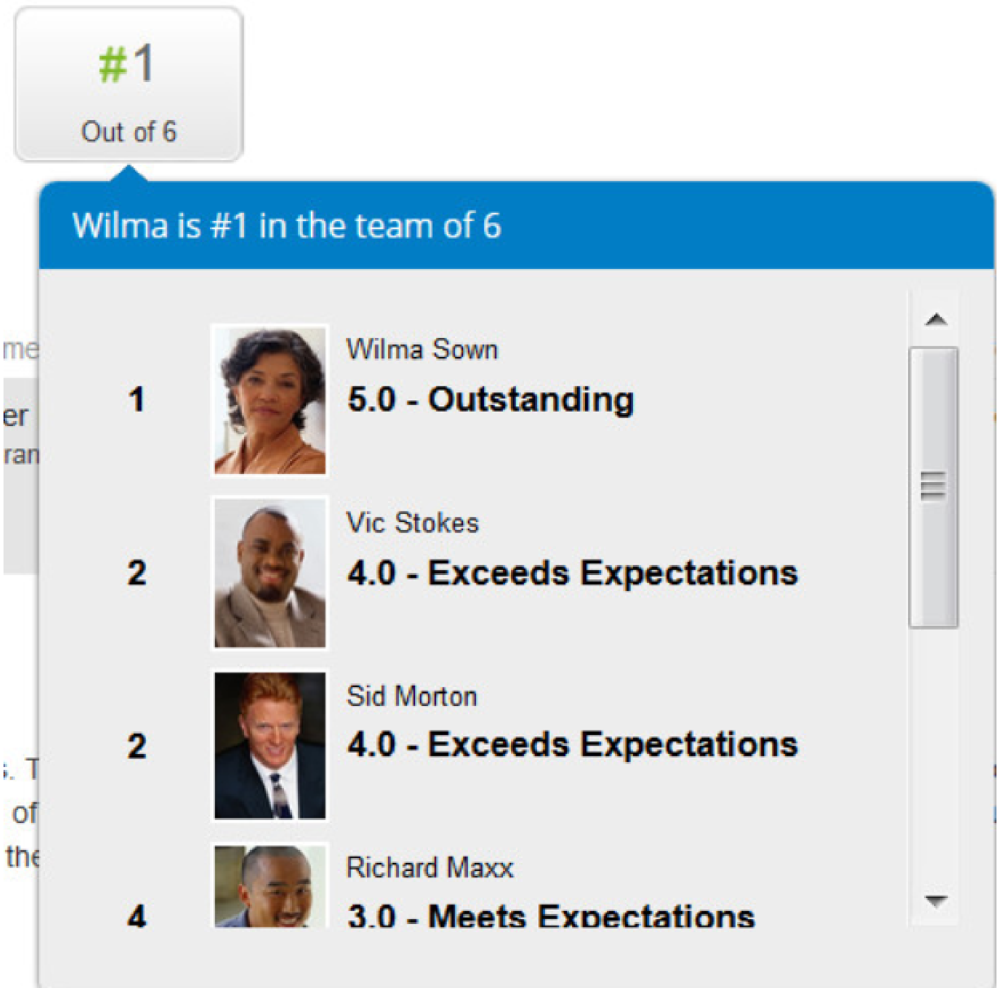
  However, for multi-byte languages 4000 bytes is not always equal to 4000 characters. Each character in multi-byte languages can take up to 2 to 3 bytes. This reduces the 4000 bytes count to 1300 characters approximately. For example, Chinese, Japanese, and so on.

- The Stack Ranker does not support Collaborative route map steps. While accessing the Stack Ranker from the Competency and the Summary section of the Performance Management form, if the form is in Collaborative route map step, the *Stack Ranker* button will not appear.

12.7 Team Rank Pod

The Team Rank Pod displays a ranking of the reviewer's direct reports based on overall ranking.

The ranking information is limited to the same performance form. It does not mix ratings from other forms.



If a form has not been completed yet, the pod will show a value of N/A for that particular direct report and will place him on the bottom of the ranking.

> **Note**
>
> If the Team Ranker Pod doesn't show the ranks of other employees reporting to you, this means that the "Start of Review" option within the Route Map has not been selected.
>
> Go to *Admin Center* > *Manage Route Maps*, select the Route map that is used by the form. Select the appropriate step in the "Modify Stage" (usually the first step), scroll to the bottom and select the *Start of Review* checkbox.

13 Configuring Form Using XML

This chapter provides information on configuring Performance Management in an XML template.This section contains general information on configuring forms in Provisioning.

> **Remember**
>
> As a customer, you do not have access to Provisioning. To complete tasks in Provisioning, contact SAP Cloud Support.

13.1 Form Templates

Form templates define the behavior of forms in Performance Management.

You can think of every Performance Management form that is created by your customer as a copy of the Performance Management form template. Configuration aspects of the form template control how the form looks and behaves, and what standard content, such as instructions, it contains. When a form is created in Performance Management, the template is copied to control configuration and these aspects. After the form is used, customer data and comments are added to the individual form instances.

13.1.1 Setting Up a New Form Template

These are the overall steps in setting up a new form template.

Procedure

1. Upload a form template (*Admin Tools > Form Template Settings*).
2. Modify the XML of the form in Provisioning.
3. Create the form's route map (Admin Tools).
4. Set the form template options.
5. Grant permission to create the form to a select set of users (Admin Tools).
6. Test toe for along the defined route map to completion; generate reports.
7. Make any necessary edits to the form and re-test.

13.1.2 Uploading the Form Template

You import or re-import form templates from the *Admin Tools* > *Form Template Settings*. You need to have logged in to SuccessFactors with administrator's privileges.

Procedure

1. From the Admin Tools page, scroll to *Form Template Administration*.
2. Click *Form Templates*.
3. Click *Upload New Form*.
4. On the *Managing Form Templates* page, browse to locate the form template XML file, then click *Upload Form Template*.

Results

A message appears informing you that the upload was successful.

13.1.3 Modifying the XML of a Form with Provisioning

Once you have uploaded a form template, you can configure it using the XML editing wizard in Provisioning.

Context

> **Remember**
>
> As a customer, you do not have access to Provisioning. To complete tasks in Provisioning, contact SAP Cloud Support.

To select a form template for editing:

Procedure

1. Log in to Provisioning.
2. Click the hyperlink of the company.
3. Click the hyperlink for *Form Template Administration*.

4. Click the hyperlink of the form you want to edit.
   Forms are listed in alphabetical order. The Type IDs are numbered sequentially as they are uploaded. *Form* indicates a PM template. *360* indicates a 360 Template.

5.

If you want to:	Do this:
Add a new section	1. Enter the name of the section 2. Choose a section type 3. Click Add.
Customize the XML of existing sections	Use the *Arrange Sections* hyperlinks or scroll down the page and locate the section.

6. Click the appropriate *Save Form* button to permanently save your new changes.

13.1.4 Exporting a Form Template

To import or re-import a form template for a select company:

Procedure

1. Log in to Performance Manager as a user with Admin privileges.
2. From the Administration Tools, scroll to *Form Template Administration.*
3. Click *Upload New Form*.
4. Browse and select the form template XML file and specify a name for the form.
5. Click *Upload Form Template*.
   A message informs you that the upload was successful.

13.1.5 DTD Definition

The DTD defines all of the configuration options and behaviors of the PM form.

Below are the most basic components of the DTD that relate to PM forms.

```
<!ELEMENT sf-pmreview (userinfo-sect?, liveprofile-sect?, reviewinfo-sect?,
introduction-sect?, objective-sect*, competency-sect*, custom-sect?, planned-learning-
sect?, learning-results-sect?, summary-sect?, signature-sect?, job-desc-sect?, objcomp-
summary-sect?, compensation-sect?)>
```

Each element can contain other elements. Elements contained with an element are referred to as sub-elements.

The following symbols are used within the dtd file to indicate the number of sub-elements you can have within a given element.

+	the sub-element must appear at least once
•	the sub-element can appear 0 or more times
?	the sub-element can appear 0 or 1 time only
No symbol	the sub-element must appear once and only once

Elements may have attributes. The attributes are a list of options with a choice of options that affect the behavior of the element. Following the xml example is a description of the elements used to configure a form template. These elements are described in the order listed above in the DTD Definition. Only the elements applicable to a Performance Review Form are described in this guide. Additional sub-elements which are used by the form section elements are described in alphabetical order (fm-element, fm-sect, fm-sect-config, etc.).

13.1.6 Example XML Form Template

This is an example of an xml form template.

```
<?xml version="1.0" encoding="UTF-8"?>
 <!DOCTYPE sf-form SYSTEM "http://svn/viewvc/svn/V4/trunk/src/com/sf/dtd/sf-
form.dtd?view=co" PUBLIC "-//SuccessFactors, Inc.//DTD V4 Form 1.0//EN">
 <sf-form version-number="2" locale="en_US">
    <fm-meta>
        <meta-form-id>-1</meta-form-id>
         <meta-rated>true</meta-rated>
         <meta-rating>0.0</meta-rating>
         <meta-scale>0.0</meta-scale>
         <meta-grp-label>
            <![CDATA[Group]]>
        </meta-grp-label>
        fm-sect-scale show-value="true">
            <scale-source>1</scale-source>
            <scale-id>
                <![CDATA[2005b]]>
            </scale-id>
            <scale-type>
                <![CDATA[null]]>
            </scale-type>
        </fm-sect-scale>
         <meta-item-weight-floor-ceiling-option>warning</meta-item-weight-floor-
ceiling-option>
         <my-team-rater/>
     </fm-meta>
     <sf-pmreview show-weight="true" weight-lockdown="false" rate-by-adding-
values="false" overall-rating="true" no-calc="false">
         <introduction-sect>
            <fm-sect cmt-opt="1" split-cmt="false" mgt-only="false" index="0">
                <fm-sect-name>
                    <![CDATA[Introduction]]>
                </fm-sect-name>
                 <fm-sect-intro>
                    <![CDATA[Welcome to this year's performance appraisal process.
This process is designed to help you and your manager identify your accomplishments
and goal achievement during the year. At the end of this process, you and your
manager will also have the ability to begin the process of identifying next year's
goals and career development opportunities. If you have any questions or concerns
```

```
relating to this year's appraisal cycle, you can contact your manager, your
divisional HR representative or consult the Human Resources website.]]>
                </fm-sect-intro>
                <fm-sect-config>
                    <rating-label>
                        <![CDATA[Rating]]>
                    </rating-label>
                    <rating-label-others>
                        <![CDATA[Rating]]>
                    </rating-label-others>
                    -<default-rating>
                        <![CDATA[unrated]]>
                    </default-rating>
                    <unrated-rating>
                        <![CDATA[Too New To Rate]]>
                    </unrated-rating>
                    <hidden-strength-threshold>0.0</hidden-strength-threshold>
                    <blind-spot-threshold>0.0</blind-spot-threshold>
                    <num-decimal-places>2</num-decimal-places>
                    <publish-button-label>
                        <![CDATA[Publish Content]]>
                    </publish-button-label>
                </fm-sect-config>
            </fm-sect>
        </introduction-sect>
        <objective-sect cmt-opt="3" split-cmt="true" mgt-only="false" index="1"
show-calculated-section-rating="true" obj-edit="popup" ez-rater-expand-all="false"
sect-mode="normal" hide-addexistinggoals-btn="false" allow-draft-tgm-goals="false"
max-goals-allowed="2147483647" min-goals-required="-2147483648" show-obj-expected-
rating="false" auto-pop-weights="false" in-objcomp-summ-overall-rating="false" in-
objcomp-summ-display="false" lock-item-weights="false" if-no-ratings-then-ignore-
section="false" use-milestone="false" no-group="false" in-overall-rating="false" in-
summ-display="true" rating-opt="3" summ-opt="0" no-weight="true" show-learning-
activity-competency="false" develop-goal="false" no-rate="true" use-jobcode="false"
configurable="true">
            <obj-sect-name>
                <![CDATA[Objectives]]>
            </obj-sect-name>
            <obj-sect-intro>
                <![CDATA[Comment on and rate the individual's demonstration of each
of the objectives listed below.]]>
            </obj-sect-intro>
            <fm-sect-config>
                <section-color>
                    <![CDATA[]]>
                </section-color>
                <rating-label>
                    <![CDATA[Rating]]>
                </rating-label>
                <rating-label-others>
                    <![CDATA[Rating]]>
                </rating-label-others>
                <default-rating>
                    <![CDATA[unrated]]>
                </default-rating>
                <unrated-rating>
                    <![CDATA[Too New To Rate]]>
                </unrated-rating>
                <hidden-strength-threshold>0.0</hidden-strength-threshold>
                <blind-spot-threshold>0.0</blind-spot-threshold>
                <num-decimal-places>2</num-decimal-places>
                <publish-button-label>
                    <![CDATA[Publish Content]]>
                </publish-button-label>
            </fm-sect-config>
            <sect-weight>50.0</sect-weight>
            <fm-sect-scale show-value="true">
                <scale-source>1</scale-source>
```

```
                <scale-id>
                    <![CDATA[2005b]]>
                </scale-id>
                <scale-type>
                    <![CDATA[null]]>
                </scale-type>
            </fm-sect-scale>
            <obj-sect-type autosync="true">
                <![CDATA[plan]]>
            </obj-sect-type>
            <obj-sect-plan-id>3</obj-sect-plan-id>
            <meta-grp-label>
                <![CDATA[Group]]>
            </meta-grp-label>
         </objective-sect>
          <competency-sect cmt-opt="2" split-cmt="true" mgt-only="false" index="2"
show-calculated-section-rating="true" ez-rater-expand-all="false" sect-
mode="normal" in-objcomp-summ-overall-rating="false" in-objcomp-summ-
display="false" lock-item-weights="false" if-no-ratings-then-ignore-section="false"
no-group="false" in-overall-rating="true" in-summ-display="true" rating-opt="3"
summ-opt="0" no-weight="false" no-rate="false" use-jobcode="true"
configurable="true" hide-waca="false" lock-behavior-content="false" behavior-
weighted="false" behavior-expected-rating-format="0" show-behavior-expected-
rating="false" comp-expected-rating-format="0" show-comp-proficiency-level="false"
show-comp-expected-rating="false" use-behavior="false" behavior-mode-opt="0"
behavior-cmt-opt="1" behavior-rating-opt="1" suppress-item-comments="0" category-
filter-opt="no-filter" use-core-comp="false">
            <comp-sect-name>
                <![CDATA[Competencies]]>
            </comp-sect-name>
            <comp-sect-intro>
                <![CDATA[Describe the individual's demonstration of each of the
competencies listed below. You can use the "Writing Assistant" to review sample
descriptions of behaviors and performance levels to help you describe the
employee's performance.]]>
            </comp-sect-intro>
            <fm-sect-config>
                <rating-label>
                    <![CDATA[Rating]]>
                </rating-label>
                <rating-label-others>
                    <![CDATA[Rating]]>
                </rating-label-others>
                <default-rating>
                    <![CDATA[unrated]]>
                </default-rating>
                <unrated-rating>
                    <![CDATA[Too New To Rate]]>
                </unrated-rating>
                <weight-total>
                    <![CDATA[100.0]]>
                </weight-total>
                <hidden-strength-threshold>0.0</hidden-strength-threshold>
                <blind-spot-threshold>0.0</blind-spot-threshold>
                <num-decimal-places>2</num-decimal-places>
                <publish-button-label>
                    <![CDATA[Publish Content]]>
                </publish-button-label>
            </fm-sect-config>
            <sect-weight>50.0</sect-weight>
            <fm-sect-scale show-value="true">
                <scale-source>1</scale-source>
                <scale-id>
                    <![CDATA[2005b]]>
                </scale-id>
                <scale-type>
                    <![CDATA[null]]>
                </scale-type>
```

```
            </fm-sect-scale>
            <meta-grp-label>
                <![CDATA[Group]]>
            </meta-grp-label>
        </competency-sect>
        <summary-sect cmt-opt="0" split-cmt="false" mgt-only="false" index="4"
rating-opt="3" overall-rating-display-order="manual-calc" show-group-matrix="true"
use-adjusted-scale-for-section-header-rating="0" rating-mode="text" show-
listing="true" override-unrated="false" manual-rating="true">
            <summary-sect-name>
                <![CDATA[Overall Performance Summary and Additional Comments]]>
            </summary-sect-name>
            <summary-sect-intro>
                <![CDATA[Use this section to summarize the employee's overall
performance during the review period.]]>
            </summary-sect-intro>
            <fm-sect-config>
                <rating-label>
                    <![CDATA[Rating]]>
                </rating-label>
                <rating-label-others>
                    <![CDATA[Rating]]>
                </rating-label-others>
                <default-rating>
                    <![CDATA[unrated]]>
                </default-rating>
                <unrated-rating>
                    <![CDATA[Too New to Rate]]>
                </unrated-rating>
                <weight-total>
                    <![CDATA[100.0]]>
                </weight-total>
                <hidden-strength-threshold>0.0</hidden-strength-threshold>
                <blind-spot-threshold>0.0</blind-spot-threshold>
                <item-weights>
                    <item-weight-floor>10.0</item-weight-floor>
                    <item-weight-ceiling>100.0</item-weight-ceiling>
                </item-weights>
                <num-decimal-places>2</num-decimal-places>
                <publish-button-label>
                    <![CDATA[Publish Content]]>
                </publish-button-label>
            </fm-sect-config>
        </summary-sect>
    <signature-sect>
        <fm-sect cmt-opt="1" split-cmt="false" mgt-only="false" index="3">
            <fm-sect-name>
                <![CDATA[Signature Section]]>
            </fm-sect-name>
            <fm-sect-intro>
                <![CDATA[Use this section to sign the document.]]>
            </fm-sect-intro>
            <fm-sect-config>
                <rating-label>
                    <![CDATA[Rating]]>
                </rating-label>
                <rating-label-others>
                    <![CDATA[Rating]]>
                </rating-label-others>
                <default-rating>
                    <![CDATA[unrated]]>
                </default-rating>
                <unrated-rating>
                    <![CDATA[Too New To Rate]]>
                </unrated-rating>
                <hidden-strength-threshold>0.0</hidden-strength-threshold>
                <blind-spot-threshold>0.0</blind-spot-threshold>
                <num-decimal-places>2</num-decimal-places>
```

```
                <publish-button-label>
                    <![CDATA[Publish Content]]>
                </publish-button-label>
              </fm-sect-config>
          </fm-sect>
       </signature-sect>
    </sf-pmreview>
</sf-form>
```

13.2 Validating for Rating Scale Configuration in Goal and Competency Sections

To prevent issues around ratings not being saved in a reportable fashion, Provisioning validates that you have the fm-sect-scale element defined in all competency and objective sections when you try to upload or change a Performance Management or 360 form template.

When uploading or updating form templates, if the form is not validated Provisioning prompts you with an error message and does not save your changes. In order to maintain backward compatibility it is still possible to create documents using form templates that don't have the scale in the sections, however you won't be able to make any future changes to a form template unless you correct this issue.

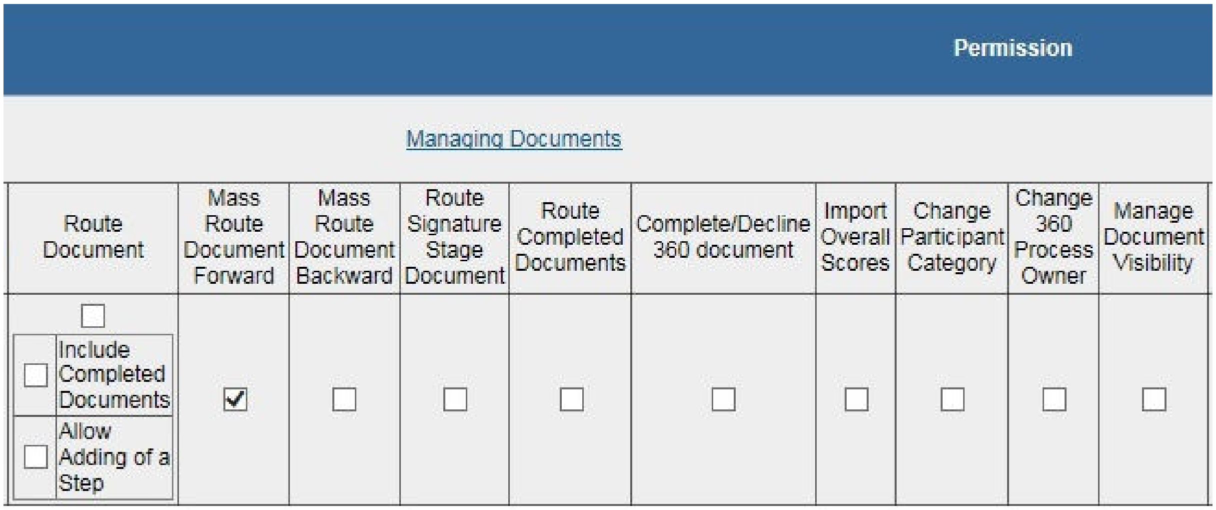
> **Remember**
>
> As a customer, you do not have access to Provisioning. To complete tasks in Provisioning, contact SAP Cloud Support.

13.3 Granting Mass Inbox Approve Permission to a User

This procedure explains how to grant/revoke the permission of Mass Inbox Approve. You need to log in as an administrator user who has permission to see the link *Administrative Privileges* under *Manage Security* in the legacy admin tools.

Procedure

1. Click *Administrative Privileges*
2. In the *Managing Administrative Privilege* page, search for the user for whom you want to grantor revoke the permission.
3. Locate and expand the *Manage Documents* link, then select or deselect *Mass Route Document* to grant/revoke the permission.



Route Document	Mass Route Document Forward	Mass Route Document Backward	Route Signature Stage Document	Route Completed Documents	Complete/Decline 360 document	Import Overall Scores	Change Participant Category	Change 360 Process Owner	Manage Document Visibility
☐ ☐ Include Completed Documents ☐ Allow Adding of a Step	☑	☐	☐	☐	☐	☐	☐	☐	☐

4. Click *Save*.

13.3.1 Configuring Mass Inbox Approve Permissions via XML

You grant this permission via Provisioning.

Context

> **Remember**
>
> As a customer, you do not have access to Provisioning. To complete tasks in Provisioning, contact SAP Cloud Support.

Procedure

1. In Provisioning, click*Form Template Administration* > *Form Templates*.
2. Select the form template to which you want to add Mass Inbox Approve permission.
3. In the `fm-meta` section, add the `<mass-route-permission>` XML tag then save.

> **Example**
>
> In this example, only the EM role can perform mass inbox approve in the C Step. The form needs to be validated when sent to the next step by EM in the C Step.

```
<mass-route-permission type="none" validation="false"

<role-name>*</role-name>

<route-step stepid="*"/> </mass-route-permission>
```

```
<mass-route-permission type="enabled" validation="true">

<role-name>EM</role-name>

<route-step stepid="CStep"/> </mass-route-permission>
```

Note

We recommend setting validation="true" to avoid data problems for other modules.

13.3.2 Common Questions on Mass Approve Inbox

The following are common questions on mass approve inbox:

Q	A
I haven't configured Mass Inbox Approve for one form template. Can I mass approve the documents already created based on that template?	Yes, you can. In this case, the Mass Inbox Approve function treats the form template as no roles and steps constraint but the default of form validation is "true". As a pre-condition, you need to grant *Mass Route Document Forward/Backward* permission to the user in *Admin Tools > Administrative Privileges > Manage Documents*
Mass Inbox Approve permission is configured in one form template. If I modify it, for example, change validation from "`true`" to "`false`", will the change impact the existing documents from that template?	Modification on form template won't be implemented on existing documents. You need to create a new form.
In the search filter, when I enter the first or last name of an employee in Employee fields, why can't I see the full name auto-completed in that input box? When I click the search button, why I can't see any document in the inbox?	Currently, the Employee input box is only for the `USERNAME` of the employee, so you should enter the user name to search. If you really want also support first-name and last-name auto-completed input box and search criteria, please file an enhancement request.
When I select one form template, why I don't see any steps of this form template in the Steps select box? When I click the search button, however, I do see some documents with steps in the list.	This is caused when a step ID is not defined for that step in the Route Map of this template. The step ID is critical for mass inbox approve permission.
Does Mass Inbox Approve support other form types such as 360, compensation?	Yes, we support all form types including PM review, 360, compensation, succession. Configurations are the same.
When I add the Mass Inbox Approve permission to the `fm-meta` section of form template and click save, why it always shows error?	Please check your permission XML is match the grammar of the <mass-route-route> in sf-form.dtd, especially the order in the elements of "fm-meta", it is after the "button-permission", that is "......button-permission*, mass-route-permission*, meta-form-rating-calc? ......". For more detail information, please reference in latest sf-form.dtd.
How can I know if a document is sent by Mass Inbox Approve?	You can open the document and check the audit trail. There will be comment such as *Mass Route: ......*

Q	A
Do we support the “O” role in the Mass Inbox Approve permission setting?	Yes, we support “O”, for example `<mass-route-permission type="enabled" validation="true"> <role-name>O</role-name> <route-step stepid="*"/> </mass-route-permission>`

13.4 Meta Section Overview

The meta section of a performance appraisal form template allows you to set overall parameters for the summary section.

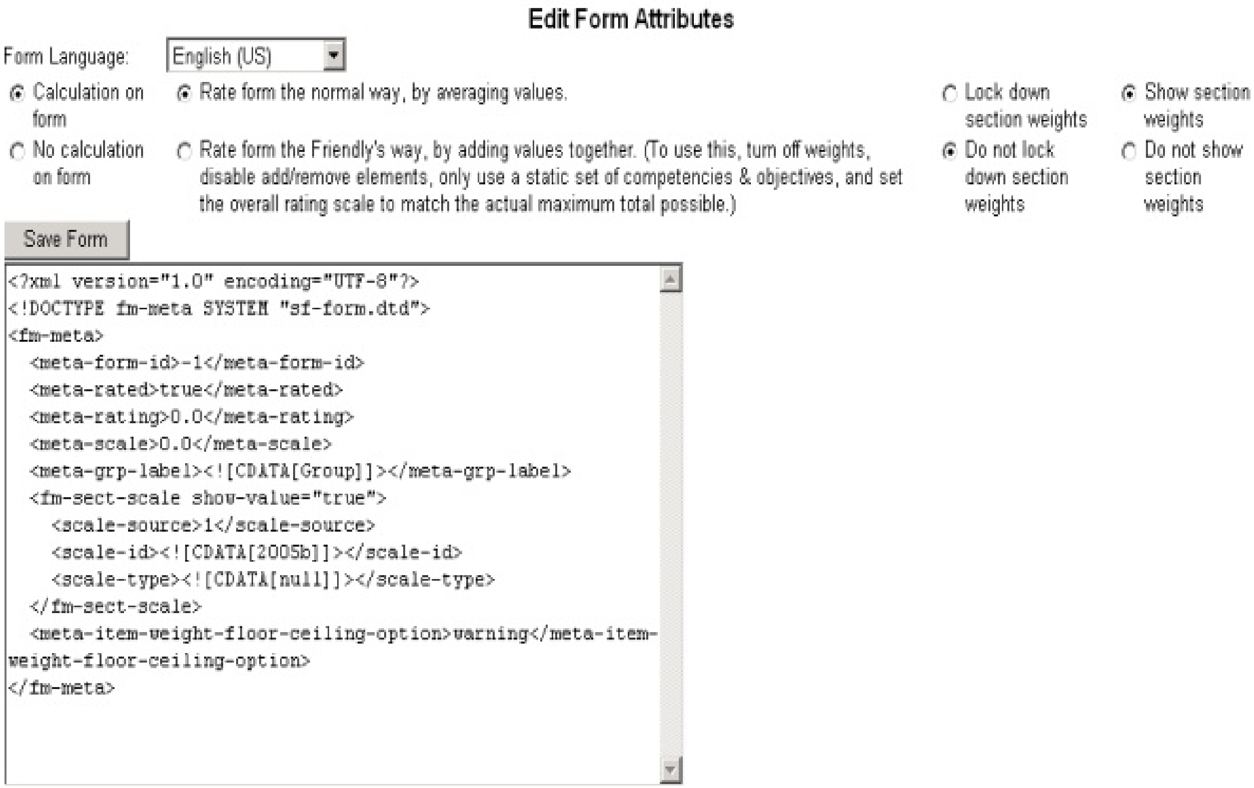
> **Remember**
>
> As a customer, you do not have access to Provisioning. To complete tasks in Provisioning, contact SAP Cloud Support.

Attributes

Attribute	Description
no-calc	"true" if not to display calculated overall form rating
split-cmt	For Performance Management v12 Acceleration forms this attribute must be set to "true" as the forms always displays ratings and comments side by side
spellchk	Obsolete: replaced by form_template_status set through Form Template Management UI; "true" if allow spell check; default is "false"
overall-rating	"true" if it doesn't allow document completion or routing to signature stage if overall rating is not valid.
rate-by-adding-values	"true" means weights are ignored, section totals are the sum of the elements, and overall total is the sum of the sections.
weight-lockdown	"true" if not allowing users to modify section weights if applicable
show-weight	"true" if display section weights if applicable
others-rating-tab-permission	This tab is defined in meta section for Performance Management V12 Acceleration forms. It is relevant for all goal, development, and competency sections. The other's rating tab can be hidden in all relevant sections as follows: `<others-ratingtab-permission type="none"> <role-name>E</role-name> <route-step stepid="1"/> <route-step stepid="2"/> <route-step stepid="5"/> </others-ratingtab-permission>`

Meta Radio Buttons in Provisioning

The series of radio buttons that appears in the provisioning form editor establish section weights and calculations.



Example

Displaying and Locking Down Section Weights

If you are creating a new form and crafting the XML in a file before you upload the form in *Administration*, you can display and lock down section weights in the form.

`<sf-pmreview>` tag.

```
<sf-pmreview no-calc="true" spellchk="true" overall-rating="true" rate-by-adding-values="false" weight-lockdown="false" show-weight="true">
```

However, once a form has been uploaded into a company's instance, section weights can be displayed or locked down by editing the form in *Provisioning*.

13.4.1 Non-Normalized Calculations

Item ratings are typically normalized to a rating scale.

If the ratings are done with a normal rating scale, normalization is simple. If you want to use an un-normalized score such as 83.7 as the rating for bonus compensation, for example, you need to set the flag to `false`.

In the <fm-sect-config > of every section (Objective, Competency, Objective-Competency summary, Summary), the <normalize-section-rating> enables or disables normalization of ratings. The values supported by this tag are `true/false`, with the default set to `true`.

The <normalize-section-rating> of <fm-sect-config > enables/disables rating normalization at respective section level. Since there is not the <fm-sect-config > element at form level one, the child element by name *meta-normalize-form-rating* is introduced in <fm-meta> to enable/disable normalization for overall form rating. Again the values supported by this element are `true/false`, default is `true`.

13.4.2 Configuring Tab Visbility Control

Tab permissions defined in the fm-meta are applied across all sections for the entire form. Tab permissions can be defined at a section level by adding the desired permissions to each section.

The tab-permission element is an optional sub-element of a competency-sect, objective-sect and fm-meta that controls visbility of the tabs within the sections.

> Remember
>
> As a customer, you do not have access to Provisioning. To complete tasks in Provisioning, contact SAP Cloud Support.

Type of Access (type attribute)

- enabled – user can see the tab
- none – user can't see the tab

Configuration is allowed for: learning-activities | others-rating | last-review-rating | goal-details | other-details

> Note
>
> - Learning Activities: Only applicable to development goal sections.
> - Other Ratings: Applicable to performance goal, development goal, and competency sections.
> - Last Review Rating: Only applicable to competency sections.
> - Goal Details: Applicable to performance goal and development goal sections.
> - Other Details: Applicable to performance goal and development goal sections.

XML Configuration

Permission type – none/enabled

```
<tab-permission type="none">
<role-name>*</role-name>
<tab refid="last-review-rating"/>
<tab refid="goal-details"/>
<tab refid="other-details"/>
<tab refid="others-rating"/>
<tab refid="learning-activities”>
<route-step stepid="*"/>
</tab-permission>
```

13.4.3 How Section Weights Affect Rating Score Calculations

To calculate the overall rating you must specify how each objective and competency scores should be weighted.

The number you choose allows you to apply a relative weighting for that section relative to other sections in the Performance Management form. For example, if you have two objective sections and you want them equally weighted you would assign the same number to both sections. Alternatively if one section was to be weighted more heavily, you could assign relative weightings to each section.

As a best practice, we recommend omitting the development objective section, whether in an Obj/Comp section or the Performance Summary section.

Two examples of how you might weight the various sections in a Performance Management form are shown below.

Example 1

PM Section	Section Weight	Section Score	Overall Score
Corporate Competency	1	4.0	4.40
Job Related Competency	2	3.5	
2006 Objectives	2	5.0	

Example 2

PM Section	Section Weight	Section Score	Overall Score
Corporate Competency	50	4.0	3.25
Job Related Competency	50	3.0	
2006 Objectives	100	4.5	
Development Objectives	0	3.0	

The development objectives are omitted from the objective score.

13.4.3.1 Section Weights

Use section weights to impose a relative importance or priority on performance factors in calculating and overall rating/score.

Bear in mind that:

- While section weights are optional in a form, they are required to calculate the overall rating
- Weights can be enabled for all competency and objective sections in a form
- Item weights are more commonly used for objectives; competencies are generally treated with equal importance; however both sections may be weighted to calculate the overall form score
- If no weights are specified in a form, all performance factors are implicitly weighted equally
- If you do not want to include the section in the overall calculated score, set the section weight to 0.0. Some sections weighted and others are not weighed.
- Typically if you are using weights in a form, you are also calculating an overall score for example, if you want to derive a numerical rating for input into a compensation module. Otherwise if you want to express ratings as a textual description weights may not be necessary

- Weights can be expressed as a number or percentage
- Weights can be configured to be editable in a form or can be displayed as read-only
- Role-based competencies and behaviors can also be assigned specific weights.
- A section can be configured so a warning appears if weights do not add up to a specified weight total. Weights do not need to add to 100%; calculation will be based on percentage of sum total.

13.4.3.1.1 Adjusted Ratings

The following is an example of using an adjusted scale to specify an overall calculated rating

You can use the scale adjusted rating. Put this in the Meta section of the form template.

```
<fm-meta>
  <meta-form-id>-1</meta-form-id>
  <meta-rated>true</meta-rated>
  <meta-rating>0.0</meta-rating>
  <meta-scale>0.0</meta-scale>
  <meta-grp-label><![CDATA[Group]]></meta-grp-label>
  <fm-sect-scale show-value="true">
  <scale-source>1</scale-source>
  <scale-id><![CDATA[Performance & Development Scale]]></scale-id>
  <scale-type><![CDATA[null]]></scale-type>
  <scale-adjusted-calculation enable="true" display-calculated-rating="false">
  <rating-label><![CDATA[Overall Rating:]]></rating-label>
  <default-rating><![CDATA[Unrated]]></default-rating>
  <scale-map-value>
  <score-min>0.1</score-min>
  <score-max>1.49</score-max>
  <mapto-score>1.0</mapto-score>
  <mapto-desc><![CDATA[Below Expectations]]></mapto-desc>
  </scale-map-value>
  <scale-map-value>
  <score-min>1.5</score-min>
  <score-max>2.49</score-max>
  <mapto-score>2.0</mapto-score>
  <mapto-desc><![CDATA[Meets Some Expectations]]></mapto-desc>
  </scale-map-value>
  <scale-map-value>
  <score-min>2.5</score-min>
  <score-max>3.49</score-max>
  <mapto-score>3.0</mapto-score>
  <mapto-desc><![CDATA[Meets Expectations]]></mapto-desc>
  </scale-map-value>
  <scale-map-value>
  <score-min>3.5</score-min>
  <score-max>4.49</score-max>
  <mapto-score>4.0</mapto-score>
  <mapto-desc><![CDATA[Exceeds Some Expectations]]></mapto-desc>
  </scale-map-value>
  <scale-map-value>
  <score-min>4.5</score-min>
  <score-max>5.99</score-max>
  <mapto-score>5.0</mapto-score>
  <mapto-desc><![CDATA[Exceeds Expectations]]></mapto-desc>
  </scale-map-value>
  </scale-adjusted-calculation>
  </fm-sect-scale>
  <meta-item-weight-floor-ceiling-option>warning</meta-item-weight-floor-ceiling-
option>
  </fm-meta>
```

Also place this in the summary section:

```
use-adjusted-scale-for-section-header-rating="1"
```

13.4.3.1.2 Example: Forcing Users to Provide an (Adjusted) Overall Performance Rating

Some clients want their managers to provide an overall performance rating based on the results in the summary section. To enable this you need to make entries in the meta section as well as the summary section.

```
<?xml version="1.0" encoding="UTF-8"?> <!DOCTYPE fm-meta SYSTEM "sf-form.dtd">
 <fm-meta>
 <meta-form-id>-1</meta-form-id>
<meta-rated>true</meta-rated> <meta-rating>0.0</meta-rating>
 <meta-scale>0.0</meta-scale>
 <meta-grp-label><![CDATA[Group]]></meta-grp-label>
<fm-sect-scale show-value="false">
 <scale-source>1</scale-source>
<scale-id><![CDATA[Overall Performance Rating Scale]]></scale-id>
 <scale-type><![CDATA[null]]></scale-type>
 <scale-adjusted-calculation enable="true" display-calculated-rating="false" >
 <rating-label><![CDATA[CALCULATED OVERALL RATING]]></rating-label>
<default-rating><![CDATA[N/A]]></default-rating>
<scale-map-value>
<score-min>0.0</score-min>
<score-max>1.49</score-max>
<mapto-score>1.0</mapto-score>
<mapto-desc><![CDATA[Unacceptable Performance (1)]]></mapto-desc>
</scale-map-value>
<scale-map-value>
<score-min>1.5</score-min>
 <score-max>2.49</score-max>
<mapto-score>2.0</mapto-score>
<mapto-desc><![CDATA[Approaching Effective Performance(2)]]></mapto-desc>
 </scale-map-value>
<scale-map-value>
<score-min>2.5</score-min>
<score-max>3.49</score-max>
<mapto-score>3.0</mapto-score>
<mapto-desc><![CDATA[Effective Performance (3)]]></mapto-desc>
 </scale-map-value>
<scale-map-value>
<score-min>3.5</score-min>
<score-max>4.49</score-max>
<mapto-score>4.0</mapto-score>
<mapto-desc><![CDATA[Excellent Performance (4)]]></mapto-desc>
</scale-map-value> <scale-map-value>
<score-min>4.5</score-min> <score-max>5.0</score-max>
<mapto-score>5.0</mapto-score>
<mapto-desc><![CDATA[Exemplary Performance (5)]]></mapto-desc>
</scale-map-value> </scale-adjusted-calculation> </fm-sect-scale>
<meta-item-weight-floor-ceiling-option>error</meta-item-weight-floor-ceiling-option>
</fm-meta>
```

In the Summary section set "OVERRIDE UNRATED= TRUE"

```
<?xml version="1.0" encoding="UTF-8"?>
 <!DOCTYPE summary-sect SYSTEM "sf-form.dtd">
<summary-sect index="7" mgt-only="false" manual-rating="true" *override-
unrated="true"* split-cmt="false" rating-opt="0" cmt-opt="0" show-listing="true"
```

```
rating-mode="text" use-adjusted-scale-for-section-header-rating="0" show-group-
matrix="false">
<summary-sect-name><![CDATA[Overall Rating and Comments]]></summary-sect-name>
<summary-sect-intro><![CDATA[The overall performance rating is calculated and
displayed here, based on the manager's rating of each performance goal and
competency. The manager may enter a Revised Overall Rating. If no Revised Overall
Rating is selected, the Calculated Overall Rating becomes the final Overall
Performance Rating. Both the manager and employee review the ratings and enter
overall comments. [[POPUP|Learn More...|http://pmguide.wachovia.com/
rating_formulaic]]]]></summary-sect-intro> <fm-sect-config> <rating-label><!
[CDATA[Rating]]></rating-label> <rating-label-others><![CDATA[Rating]]></rating-
label-others>
<default-rating><![CDATA[N/A]]></default-rating>
<hidden-strength-threshold>0.0</hidden-strength-threshold>
<blind-spot-threshold>0.0</blind-spot-threshold>
<section-comments-label><![CDATA[Overall Comments]]></section-comments-label>
<section-permission type="hidden">
<role-name>*</role-name>
<route-step stepid="planning"/>
<route-step stepid="updates"/>
<route-step stepid="postinterim"/>
</section-permission>
<section-permission type="hidden">
<role-name>E</role-name>
<route-step stepid="preevaluation"/>
<route-step stepid="evaluation"/>
</section-permission>
<section-permission type="enabled">
<role-name>EM</role-name>
<route-step stepid="preevaluation"/>
<route-step stepid="evaluation"/> </section-permission>
<num-decimal-places>2</num-decimal-places>
<publish-button-label><![CDATA[Publish Content]]></publish-button-label>
</fm-sect-config>
<field-permission type="none">
<role-name>*</role-name>
<field refid="calculated-overall-rating"/>
<field refid="manual-overall-rating"/>
<route-step stepid="planning"/>
<route-step stepid="updates"/>
<route-step stepid="postinterim"/>
<route-step stepid="preevaluation"/>
</field-permission>
<field-permission type="none">
<role-name>E</role-name>
<field refid="calculated-overall-rating"/>
<field refid="manual-overall-rating"/>
<route-step stepid="preevaluation"/>
<route-step stepid="evaluation"/>
</field-permission>
<field-permission type="none">
<role-name>*</role-name>
<field refid="section-comments"/>
<route-step stepid="planning"/>
</field-permission> <field-permission type="none">
<role-name>*</role-name>
<field refid="section-comments"/>
 <route-step stepid="preevaluation"/>
</field-permission> <overall-rating-label>
<![CDATA[Revised Final Rating]]></overall-rating-label>
 <calc-rating-label><![CDATA[CALCULATED OVERALL RATING]]></calc-rating-label>
</summary-sect>
```

13.4.4 Configuring Character Count Limitations

You can configure the character limit and a character limit bar for the text elements like section comments, item comments, and textarea fields to warn the user when the configured character limit is not met.

Ad Hoc reporting only supports up to 4000 characters/byte for textarea fields. If a customer has configured a textarea field to have a maximum count to be > 4000 characters/bytes, they will only be able to report on the first 4000 characters/byte entered.

Also, when Team Rater is enabled for the Performance form, section comments and item comments in the Competency Section will allow maximum count of 4000 character/bytes. A warning message will be displayed when the user exceeds 4000 characters/bytes limit.

> **Note**
>
> In case of single byte languages 4000 bytes is around 4000 characters as each byte take up one character. For example, English, French, Italian, and so on.
>
> However, for multi-byte languages 4000 bytes is not always equal to 4000 characters. Each character in multi-byte languages can take up to 2 to 3 bytes. This reduces the 4000 bytes count to 1300 characters approximately. For example, Chinese, Japanese, and so on.

The character limit settings can be configured using the following XML metadata:

> **Remember**
>
> As a customer, you do not have access to Provisioning. To complete tasks in Provisioning, contact SAP Cloud Support.

Setting	Description

fm-meta: meta-enforce-rte-limit and meta-enforce-plain-text-length-limit	`<fm-meta>`
	`...`
	`<meta-enforce-rte-limit>true</meta-enforce-rte-limit>`
	`<meta-enforce-plain-text-length-limit>true</meta-enforce-plain-text-length-limit>`
	`...`
	`</fm-meta>`
	
	When the `meta-enforce-rte-limit` and `meta-enforce-plain-text-length-limit` metadata are set to true, the maximum limit for the text element fields is set to 4000 character/bytes. If a user enters more than 4000 characters/bytes, a warning message is displayed and the excess characters are truncated.
	
	Also, a character counter bar will be dispalyed when the number of characters in the comment fields reaches 75% of the custom or default limit. This character limit bar appears on the right bottom corner of the comment box. On hovering the mouse over the bar, the number of characters that are left to reach the maximum limit is displayed.
	
	`<fm-meta>`
	`...`
	`<meta-enforce-rte-limit>false</meta-enforce-rte-limit>`
	`<meta-enforce-plain-text-length-limit>false</meta-enforce-plain-text-length-limit>`
	`...`
	`</fm-meta>`
	
	When both the `meta-enforce-rte-limit` or `meta-enforce-plain-text-length-limit` metadata are set to `false`, the 4000 characters/bytes limit is not applied and the user is allowed to enter more than 4000 characters/bytes in the text element fields. *However, it is important to note that Ad Hoc reports will only support the first 4000 characters/bytes for such text elements fields when the limit is crossed.*
	
	Also, the character limit bar will not be displayed.

cmt-max-limit	`cmt-max-limit=-1` The `cmt-max-limit` metadata allows you to configure the maximum character limit for text elements field. The default value of this field is -1, which indicates that the maximum limit has not been configured and you can enter any number of characters in the text field. There is no limit on the maximum number of characters allowed. *However, it is important to note that Ad Hoc reports will only support the first 4000 characters/bytes for such text elements fields when the limit is crossed. .*
Required fields: Using the *Minimum Value* and the *Maximum Value* fields on the UI	You can also configure the *Minimum Value* and the *Maximum Value* from *Admin Center* > *Manage Templates* > *<Performance Form>* > *Required Field Permissions* **Note** When the above two items are configured, and if the maximum value of required fields is less than 4000, then this value will replace the `cmt-max-limit` configuration.

The table below list those sections of the form whose character limit can be configured for the text elements like section comments, item comments, and textarea fields:

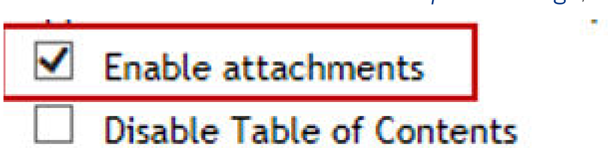
Sections	Support	Comments
Objective Section	Yes	
Competency Section	Yes	
Custom Section	Yes	
Summary Section	Yes	
Signature Section	Yes	
Introduction Section	NA	This section does not have text elements like section comments, item comments, and textarea fields
Perfpostsummary Section	Yes	
ObjComSummary Section	Yes	
Reviewinfo Section	NA	This section does not have text elements like section comments, item comments, and textarea fields
UserInfo Section	NA	This section does not have text elements like section comments, item comments, and textarea fields

13.4.5 Configuring Attachments

Performance Management v12 Acceleration lets you configure forms to upload attachments, which allows users to attach supportive documents to a review form.

To enable attachments, you need to

1. Select *Enable attachments* in *Form Template Settings*, which enables the attachments feature for the template.



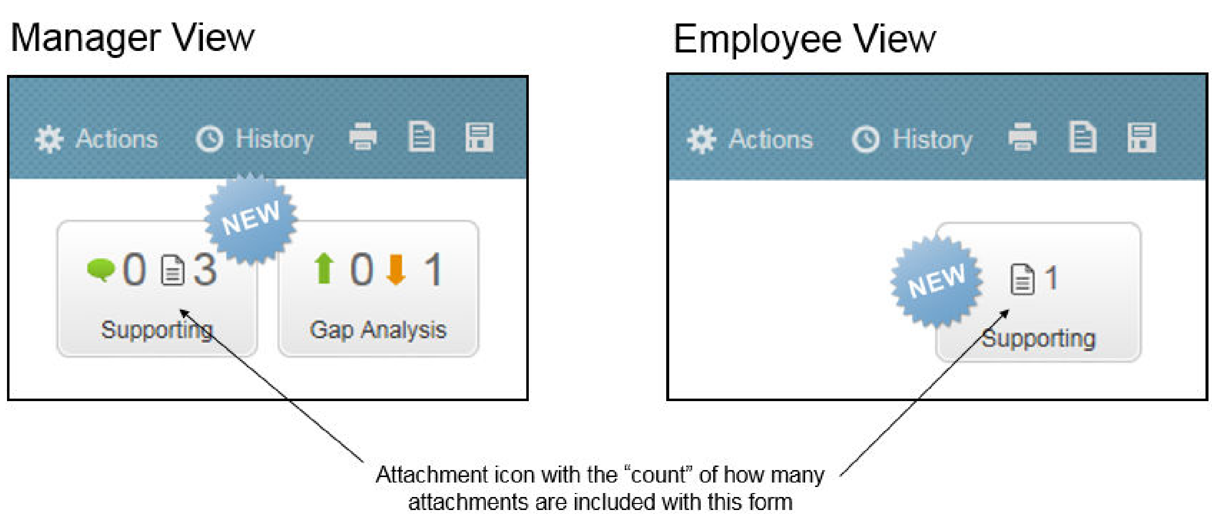
2. Set permissions in the `fm-meta` section as shown in the following example:

```
<attachment-permission type="none">
    <role-name>*</role-name>
    <attach-action refid="read"/>
    <attach-action refid="edit"/>
  </attachment-permission>
  <attachment-permission type="enabled">
    <role-name>E</role-name>
    <attach-action refid="edit"/>
  </attachment-permission>
  <attachment-permission type="enabled">
```

```
    <role-name>EM</role-name>
    <attach-action refid="read"/>
  </attachment-permission>
```

> **Note**
>
> Possible settings are:
> - None: Attachments will not be displayed to the user.
> - Enabled: Enable read/edit actions.
> - Read: Show all attachments, add icon for adding own attachments and rename/edit own attachments.
> - Edit: Include all read operations, delete and rename/edit all attachments.

Views of the form by managers and employees are shown below:



13.5 Form Sections and Configuration by Type

This section describes the form sections and configuration by type.

> **Remember**
>
> As a customer, you do not have access to Provisioning. To complete tasks in Provisioning, contact SAP Cloud Support.

User Info Section [page 219]
This element is used to display non-editable, read-only information about the user being reviewed, also known as the form subject.

Review Info Section [page 222]
This element is used to display the review period covered by the form and the name of the person who created the form.

Form Introduction Section Type [page 224]
This element is used to display introductory information. The introduction-sect element supports html.

Competency Section [page 227]
The Competency section is one of the main working sections in a form.

Goals Section [page 253]
Goals is one of the main working sections in a form. This section is used to define all the objectives or goals that are to be evaluated during a review event.

Summary-sect [page 275]
The Summary section displays summarized information about all the evaluated sections on the form in one central area. For example, if you rate two goal sections and two competency sections in your form, summaries about the content in all four sections would be shown in the Overall Summary section.

13.5.1 User Info Section

This element is used to display non-editable, read-only information about the user being reviewed, also known as the form subject.

This section can display any of the data elements in the employee table. By default, each data element displayed reflects the user data that is current at the time the form is opened. To preserve the user information that existed at the time the form was created -- even if the user's information changes after the form was created -- then set the `sync-until-completion ="false"`. In the example below, you could set the `sync-until-completion="false"` for the user's job title so it will display the job title the user had at the time the form was created.

You can report in AdHoc reports on the manager, division, department and location fields as of form launch. For this reporting enhancement to work, `sync-until-completion` must be set to false for these fields.

These are accepted user information fields:

- USERNAME
- FIRSTNAME
- LASTNAME
- MI
- GENDER
- EMAIL
- MANAGER
- HR
- DEPARTMENT
- JOBCODE
- DIVISION
- LOCATION
- TIMEZONE
- HIREDATE
- EMPID
- TITLE
- BIZ_PHONE

- FAX
- ADDR1
- ADDR2
- CITY
- STATE
- ZIP
- COUNTRY
- REVIEW_FREQ
- LAST_REVIEW_DATE
- CUSTOM01
- CUSTOM02
- CUSTOM03
- CUSTOM04
- CUSTOM05
- CUSTOM06
- CUSTOM07
- CUSTOM08
- CUSTOM09
- CUSTOM10
- CUSTOM11
- CUSTOM12
- CUSTOM13
- CUSTOM14
- CUSTOM15
- MATRIX_MANAGER

DTD Definition

```
<userinfo-sect>
<fm-sect
index="1"
mgt-only="false"
split-cmt="false"
cmt-opt="1">
 <fm-sect-name><![CDATA[User Information]]></fm-sect-name>
  <fm-sect-intro><![CDATA[]]></fm-sect-intro>
  <fm-sect-config>
    <rating-label><![CDATA[Rating]]></rating-label>
    <rating-label-others><![CDATA[Rating]]></rating-label-others>
    <default-rating><![CDATA[unrated]]></default-rating>
    <hidden-strength-threshold>0.0</hidden-strength-threshold>
    <blind-spot-threshold>0.0</blind-spot-threshold>
    <num-decimal-places>2</num-decimal-places>
    <publish-button-label><![CDATA[Publish Content]]></publish-button-label>
  </fm-sect-config>
  <fm-element index="0" type="3">
    <ekey><![CDATA[FIRSTNAME]]></ekey>
    <ename><![CDATA[]]></ename>
    <evalue><![CDATA[]]></evalue>
  </fm-element>
  <fm-element index="1" type="3">
```

```
    <ekey><![CDATA[LASTNAME]]></ekey>
    <ename><![CDATA[]]></ename>
    <evalue><![CDATA[]]></evalue>
  </fm-element>
  <fm-element index="2" type="3">
    <ekey><![CDATA[HR]]></ekey>
    <ename><![CDATA[]]></ename>
    <evalue><![CDATA[]]></evalue>
  </fm-element>
  <fm-element index="3" type="3">
    <ekey><![CDATA[USERNAME]]></ekey>
    <ename><![CDATA[]]></ename>
    <evalue><![CDATA[]]></evalue>
  </fm-element>
   </fm-sect>
</userinfo-sect>
```

Attributes

Option	Valid Values	Description
Index	Numeric	The order in which sections are displayed in the form is controlled by section index number starting with `index="0"`. As a result, the form XML can list sections in any order. When you move sections using Provisioning the index number assigned to a section will be updated automatically to reflect how you have re-arranged the sections in the form.

Elements

Element	Comments
fm-sect	See fm-sect for details

> **Note**
>
> The configuration for this section occurs in `fm-sect`, a sub-element of the `userinfo-sect`. See fm-sect and fm-elements for details and examples.

> **Note**
>
> Labels are defined in the Succession Data Model.

Parent topic: Form Sections and Configuration by Type [page 218]

Related Information

[Review Info Section [page 222]](#)
Form Introduction Section Type [page 224]
Competency Section [page 227]
Goals Section [page 253]
Summary-sect [page 275]

13.5.2 Review Info Section

This element is used to display the review period covered by the form and the name of the person who created the form.

The Review Info section is sometimes labeled Review Information or Review Period. The originator field cannot be changed, and no additional fields can be added to this section. The review start, end, and due dates can be set as configurable via Form Template Settings. XML customization of this section is limited to changing the section name, section name color bar, and section intro text. You can use permissions to control editing of the fields.

> **Remember**
>
> As a customer, you do not have access to Provisioning. To complete tasks in Provisioning, contact SAP Cloud Support.

DTD Definition

```
<!ELEMENT reviewinfo-sect (reviewinfo-sect-name, reviewinfo-sect-intro?, fm-sect-
config?,field-permission*)>
<!ATTLIST reviewinfo-sect
index CDATA #REQUIRED
>
```

Attributes

Option	Valid values	Description
Index	numeric	The order in which sections are displayed in the form is controlled by section index number starting with index="0". As a result, the form XML can list sections in any order. When you move sections using Provisioning the index number assigned to a section will be updated automatically to reflect how you have rearranged the sections in the form.

Elements

Element	Comments
reviewinfo-sect-name	See fm-sect-name for details.
reviewinfo-sect-intro	Introductory text that appears in the section. See fm-sect-intro for details.
fm-sect-config	Controls the color of the section. See fm-sect-config for details.
field-permission	See field-permission for details.

Example

XML Example:

This is an example of a review info section where the fields cannot be edited. They are display only.

```
<reviewinfo-sectindex="2">
  <reviewinfo-sect-name><![CDATA[Review Information]]></reviewinfo-sect-name>
  <reviewinfo-sect-intro><![CDATA[<b>This review covers the dates listed below.</
b>]]></reviewinfo-sect-intro>
 <fm-sect-config>
        <rating-label><![CDATA[Rating]]></rating-label>
        <rating-label-others><![CDATA[Rating]]></rating-label-others>
           <default-rating><![CDATA[unrated]]></default-rating>
        <hidden-strength-threshold>0.0</hidden-strength-threshold>
        <blind-spot-threshold>0.0</blind-spot-threshold>
    <section-permission type="disabled">
      <role-name>*</role-name>
      <route-step stepid="*"/>
    </section-permission>
    <num-decimal-places>2</num-decimal-places>
    <publish-button-label><![CDATA[Publish Content]]></publish-button-label>
  </fm-sect-config>
</reviewinfo-sect>
```

Parent topic: Form Sections and Configuration by Type [page 218]

Related Information

User Info Section [page 219]
Form Introduction Section Type [page 224]
Competency Section [page 227]
Goals Section [page 253]
Summary-sect [page 275]

13.5.3 Form Introduction Section Type

This element is used to display introductory information. The introduction-sect element supports html.

Supported HTML tags

HTML tags	Description	Example
<p>	Defines a paragraph	Paragraph
<a>	Defines a hyperlink	hyperlink
	Defines important text	bold text
	Defines emphasized text	emphasis
	Defines underlined text	<u>underlined text</u>
	Defines an ordered list	This is an example of a numbered list
<u>	Defines an unordered list	This is an example of a bulleted list
	Defines a list	This is an example of a list
	Defines font, color, and size for text	colored text larger text
<img>	Defines an image	
	Defines a section in a document	Section of a document
<blockquote>	Defines a section that is quoted from another source	<blockquote cite="http://www.successfactors.com"> </blockquote>

Note

<span> and <img> are the only HTML tags that supports the "style" attribute

Example

XML Example:

This is an example of an introduction section. The fm-sect-config sub-element is required but in this case does not affect the configuration.

```
<introduction-sect>
<fm-sect
index="0"
mgt-only="false"
split-cmt="false"
cmt-opt="1">
 <fm-sect-name><![CDATA[Introduction]]></fm-sect-name>
  <fm-sect-intro><![CDATA[]]></fm-sect-intro>
  <fm-sect-config>
    <rating-label><![CDATA[Rating]]></rating-label>
    <rating-label-others><![CDATA[Rating]]></rating-label-others>
    <default-rating><![CDATA[unrated]]></default-rating>
    <hidden-strength-threshold>0.0</hidden-strength-threshold>
    <blind-spot-threshold>0.0</blind-spot-threshold>
    <num-decimal-places>2</num-decimal-places>
    <publish-button-label><![CDATA[Publish Content]]></publish-button-label>
  </fm-sect-config>
</fm-sect>
</introduction-sect>
```

Attributes

Attributes	Valid values	Description
index	Numeric	The order in which sections are displayed in the form is controlled by section index number starting with index="0". As a result, the form XML can list sections in any order. When you move sections using Provisioning the index number assigned to a section will be updated automatically to reflect how you have rearranged the sections in the form.
mgt-only	True or False	True if only Manager or HR can see this section
split-cmt	True or False	True if displaying Subject and Manager's comments side by side
cmt-opt	Numeric	Show both item and section comments

Elements

Elements	Description	Can be configured from Manage Template Settings in Admin Center
<introduction-sect>	Performance Management introduction section	
<fm-sect>	Generic section for all SFV4 forms.	
<fm-sect-name>	The name of the section.	Yes

Elements	Description	Can be configured from Manage Template Settings in Admin Center
<fm-sect-intro>	Introductory text that can be used to provide the user with the information needed to complete the section. This can also be instruction text that describes the business processes, corporate values and goals, or that references other documents.	Yes
<fm-sect-config>	This element contains configurable options for any form sections. • **rating-label**: Label that corresponds to the Rating of Record field • **rating-label-others**: Label that corresponds to the Subject Rating or the Personal Rating, ratings other than the Rating of Record • **default-rating**: The default rating value when no value is selected • **unrated-rating**: The rating value that can be selected by the user. This value is not included in the calculation. • **hidden-strength-threshold**: Not supported in PMv12A • **blind-spot-threshold**: Not supported in PMv12A • **num-decimal-places**: Number of decimals places to use when calculating the rating for this section • **publish-button-label**: Not supported in PMv12A	

Parent topic: Form Sections and Configuration by Type [page 218]

Related Information

User Info Section [page 219]
Review Info Section [page 222]
Competency Section [page 227]
Goals Section [page 253]
Summary-sect [page 275]

13.5.4 Competency Section

The Competency section is one of the main working sections in a form.

Remember

As a customer, you do not have access to Provisioning. To complete tasks in Provisioning, contact SAP Cloud Support.

The Competency section lists the competencies or competency behaviors that a manager and others evaluate during a review. A form can have several Competency sections, for example, Core Competencies, and Job Role Competencies, however, each competency ID can appear only once in a form. All Competency sections work in the same way.

Competencies can be pre-populated or added manually. There are several ways to pre-populate competencies, and it is possible to combine two or more methods as needed. You can control the ability to add and/or remove competencies, as well as limit the content to specified competency categories. Once competencies have been populated in the form, you can rate and/or comment on them.

Parent topic: Form Sections and Configuration by Type [page 218]

Related Information

User Info Section [page 219]
Review Info Section [page 222]
Form Introduction Section Type [page 224]
Goals Section [page 253]
Summary-sect [page 275]

13.5.4.1 others-rating-tab-item-permission

The others-rating-tab-item-permission defines access on a field level within the *Other's Rating* tab.

The others-rating-tab-item-permission can be defined in each goal (objective), development, or competency sections. The following is an example of the XML code to use below the field permission.

```
<others-ratingtab-item-permission type="none">
     <role-name>*</role-name>
    <tab-item refid="item-rating"/>
    <route-step stepid="1"/> <route-step stepid="2"/>
 </others-ratingtab-item-permission>
```

Related Information

General Settings - Advanced Options [page 125]
Form Tab Configuration and Visibility Control [page 366]

13.5.4.2 Determining Which Competencies are Populated into a Form Section

Competencies can be associated to employees based on their role or job code, hard-coded into a form or pulled into a form manually.

> **Remember**
>
> As a customer, you do not have access to Provisioning. To complete tasks in Provisioning, contact SAP Cloud Support.

If you are using Job Code/Competencies associations, only the competencies that correspond to a user role at the time that the form is created appear in the form. Competencies in a form will not automatically change if a subject's job code change results in a change to their competencies.

If you change competencies and want those reflected in the form, you need to re-create the form. Competencies in a form do not automatically change if a subject's job code change results in a change to his or her competencies.

To	Do this
auto-populate by job code	use `jobcode="true"`
auto-populate core competencies	use `core-comp="true"`
restrict the competencies to one category:	`category-filter-opt="specified-category" <comp-category><![CDATA[Technical]]></comp-category>`
allow the user to manually add competencies:	`configurable="true"`
hard code a competency	enter the corresponding competency ID Example: you want to evaluate the entire company or a group of users against the same performance factors/criteria `<fm-competency index="0" removable="false"> <fm-comp-id>434</fm-comp-id> <fm-comp-name><![CDATA[null]]></fm-comp-name> <fm-comp-desc><![CDATA[null]]></fm-comp-desc> </fm-competency>`

> **Note**
>
> When using mapping other than via Job Code with a legacy competency library, and not with JDM 2.0, add the following:
>
> ```
> <fm-comp-filter-mapping enable="true">
>  <fm-comp-filter-element refid="custom04"/>
> </fm-comp-filter-mapping>
> ```

Determing the Competency ID

From *Administration or Provisioning* > *Managing Competencies* > *Competency Libraries* > *Competency Library Name* > locate the competency and look at the ID column.

13.5.4.2.1 DTD Definition of the Competency Section

This is an example of DTD definition of the competency section.

Make sure that your always download the latest DTD before use.

```
<!ELEMENT competency-sect (comp-sect-name, comp-sect-intro?, fm-sect-config?,
action-permission*, field-permission*, behavior-rating-calc?, competency-rating-
calc?,
sect-weight?, sect-weight-4-objcomp-summary?, fm-sect-scale?, fm-subitem-scale?,
comp-category*, sect-fm-elements?, sect-level-elements?, fm-competency*, fm-
comment*,
meta-grp-label?, meta-grp*, content-filters?, fm-rating-info-config?,
fm-comp-filter-mapping?)>
```

```
<!ATTLIST competency-sect
index="7"
configurable="true"
mgt-only="false"
use-jobcode="false"
use-core-comp="false"
category-filter-opt="no-filter"
no-rate="false"
no-weight="false"
summ-opt="0"
split-cmt="false"
rating-opt="0"
cmt-opt="0"
suppress-item-comments="0"
behavior-rating-opt="0"
behavior-cmt-opt="1"
behavior-mode-opt="0"
in-summ-display="true"
in-overall-rating="true"
no-group="true"
use-behavior="false"
if-no-ratings-then-ignore-section="true" l
ock-item-weights="false"
in-objcomp-summ-display="false"
in-objcomp-summ-overall-rating="false"
```

```
show-comp-expected-rating="false"
show-comp-proficiency-level="false"
comp-expected-rating-format="0"
show-behavior-expected-rating="false"
behavior-expected-rating-format="0"
behavior-weighted="false"
min-competencies-required="-2147483648"
max-competencies-allowed="2147483647"
sect-mode="normal"
ez-rater-expand-all="false"
show-calculated-section-rating="true"
lock-behavior-content="false"
hide-waca="false">
```

13.5.4.2.1.1 fm-comp-filter-mapping

The optional fm-comp-filter-mapping element allows competencies to be mapped beyond just the JOBCODE value.

Any standard user information field could be used for mapping competencies. The following are sample steps to use this feature:

1. Configure the list of data types that can be used for mapping competencies in SM Data Model as shown in the following example. This example configures 'jobCode', 'department', 'division', 'custom03' and 'custom04' as valid mapping data types.

```
<view-template id="sysMappingDataTypes" visibility="none" pdf-printing-
enabled="true">
 <label>View Template for mapping data types</label>
 <description>This View Template is for Families and Roles mapping data types</
description>
 <edit-template id="sysMappingDataTypesEditTemplate">
<label>Edit Template for Job Roles Data Type</label>
<description>Edit Template for Job Roles Data Type </description>
 <standard-element-ref refid="jobCode"/>
<standard-element-ref refid="department"/>
<standard-element-ref refid="division"/>
<standard-element-ref refid="custom03"/>
 <standard-element-ref refid="custom04"/>
 </edit-template> </view-template>
```

2. Create a role, with a set of competencies, based on one of the configured mapping data types, along with the value(s) for the given mapping data type.
3. Use fm-comp-filter-mapping element, in the competency section of an assessment form template, to specify the mapping data type to be used for pulling competencies.
   Note that only a single mapping data type can be specified for a given competency section. The form subject's value for the specified mapping data type will be used for fetching the applicable role(s) and thereby the corresponding associated competencies. The enable attribute of fm-comp-filter-mapping needs to be set to 'true' to enable this functionality.
   The default value for `enable` is `false`.

Example

This example shows how to map competencies based on `department`.

```
<fm-comp-filter-mapping enable="true">
<fm-comp-filter-element refid="department"/>
</fm-comp-filter-mapping>
```

> **Example**
>
> This example shows how to map competencies based on `division`.

```
<fm-comp-filter-mapping enable="true">
<fm-comp-filter-element refid="division"/>
 </fm-comp-filter-mapping>
```

> **Example**
>
> This example shows how to disable an existing fm-comp-filter-mapping by setting its `enable` attribute to `false`.

```
<fm-comp-filter-mapping enable="false">
<fm-comp-filter-element refid="custom03"/>
</fm-comp-filter-mapping>
```

```
<!ELEMENT fm-comp-filter-mapping (fm-comp-filter-element)>
<!ATTLIST fm-comp-filter-mapping
            enable (true | false) "false"
```

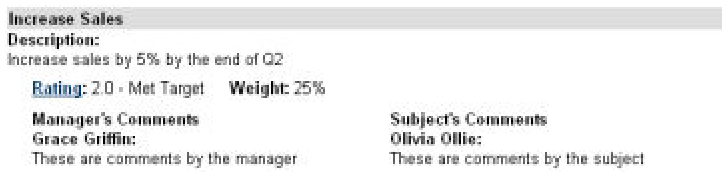
13.5.4.3 Attributes of the Competency Section

Attributes control the behavior of the competency section.

> **Remember**
>
> As a customer, you do not have access to Provisioning. To complete tasks in Provisioning, contact SAP Cloud Support.

Option	What does it do?
Index	The order in which sections are displayed in the form is controlled by section index number starting with `index="0"`. As a result, the form XML can list sections in any order. When you move sections using Provisioning the index number assigned to a section will be updated automatically to reflect how you have re-arranged the sections in the form.
configurable	`true` if users are allowed to add/remove items within the section
sum-comment-only	Obsolete; replaced by cmt-opt
ask-4-comment	Obsolete; always set to "`false`"
use-jobcode	Default is `false`. Set to `True` to auto-populate the section with related competencies
category-filter-opt	Specified-category limits competencies as specified by comp-category
no-rate	`false` if show rating scale for items within the section
no-weight	`false` if show item weights within the section, and the section's average rating will be used in the form's calculated overall rating.

<table>
<tr><th>Option</th><th>What does it do?</th></tr>
<tr><td>summm-opt</td><td>
Maximum number of section items for section summary to be displayed;
to turn on section summary at all times, then make it 0;
to turn off the section summary at all times, then make it a large number, for example, 99999
Example shown below <code>summ-opt = 0</code>

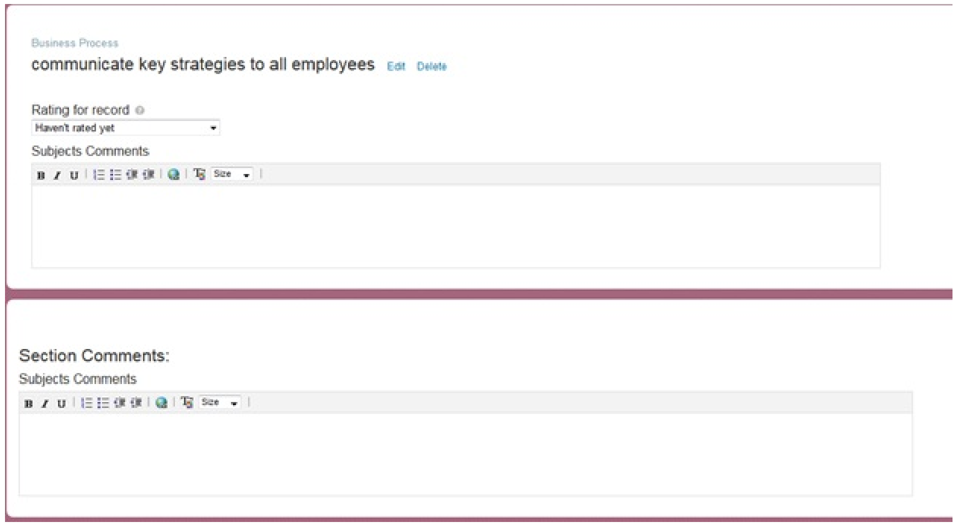

</td></tr>
<tr><td>split-cmt</td><td>
<code>split-cmt="true"</code>. Subject and manager's comments are displayed side by side


Note
In Performance Management v12 Acceleration, split-cmt is always "true"
</td></tr>
</table>

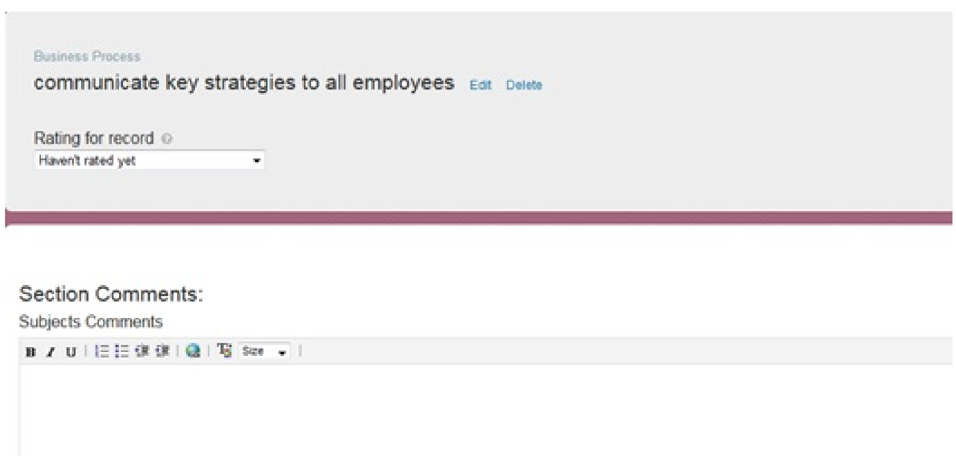
Option	What does it do?
rating-opt	The **rating of record** is the rating that is used in reports, the export process and the dashboard for competency ratings, objective ratings and the overall rating in Performance Management reviews. At the moment, the employee rating is never the rating of record unless the item-rating is permissioned so that only the employee can enter it. **Rating Option 0:**All the users with permission shares one rating box for each item. This is known as the rating of record, also referred as the item-rating. Only the rating of record field (item-rating) is displayed and is editable by any user with write permissions for the field. The first user can set a rating of record until the next user changes it. The last user in the route map with write access has final say over the rating of record.. In **Rating Option 1**, everyone is able to edit the rating of record field (item-rating) until the fields are permissioned. For users updating the rating of record field, the last user in the route map with permission to this field will provide the final rating of record for the item. In addition to the rating of record field, the employee is also able to edit the unofficial user rating field (item-cmt-rating). The ideal configuration for the employee role is to grant read or none permission to the rating of record field (item-rating) which will prevent the employee from providing the rating of record (item-rating). In **Rating Option 2**, everyone is able to edit both the rating of record field (item-rating) and the unofficial user rating field (item-cmt-rating) until the fields are permissioned. The user who should have the ability to provide the final rating of record should have write permission for the rating of record field (item-rating) and, should have at least read or write permission to the Unofficial user rating field (item-cmt-rating) so that they have visibility into the ratings provided by others. Users who should not have permission to update the rating of record field (item-rating) should have none permission for this field and read or write permission to the unofficial user rating field (item-cmt-rating). **Rating Option 3:**One rating field appears for the subject of the form that only the subject can access. This is referred to as the subject-item-rating. Another rating appears for the manager, and this rating field can only be accessed by the manager. This is also know as the rating of record or item-rating, which is only displayed and can be written into by the EM (direct manager) role. The subject-item-rating field is displayed and is editable only by the subject of the form. No other users on the route map will be able to rate the form.

<table>
<tr><th>Option</th><th>What does it do?</th></tr>
<tr><td>cmt-opt</td><td>

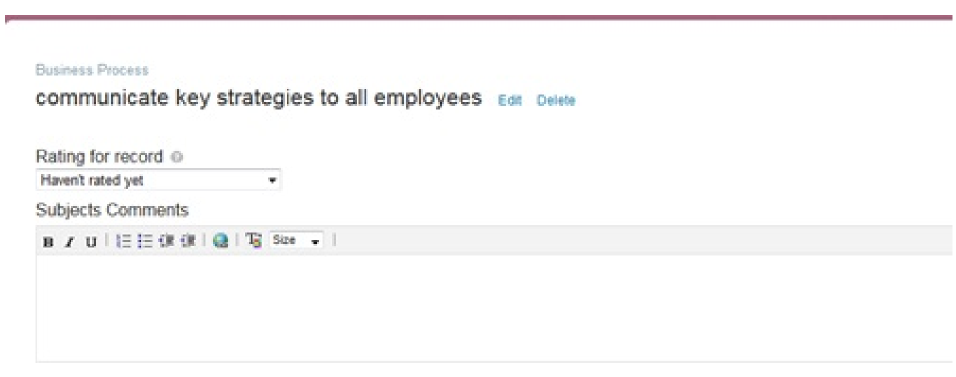
`cmt-opt=0` Show both item and section comments



`cmt-opt=1` Show only section comments, no item comments.



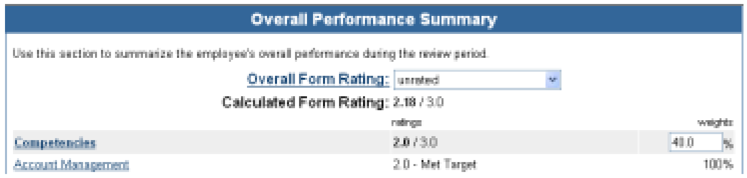
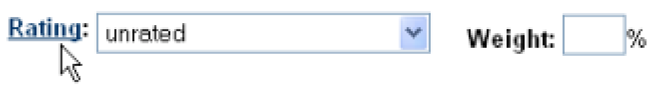
`cmt-opt = 2`. Show only item comments, no section comments



`cmt-opt=3` Show no item and section comments;

</td></tr>
</table>

Option	What does it do?
	
suppress-item-comments	0: DEFAULT: do NOT suppress item comments (in other words, show item comments) 1: suppress behavior comments but allow competency comments 2: suppress competency comments but allow behavior comments 3: suppress item comments
behavior-rating-opt	0: DEFAULT. No ratings next to the subject's comment 1: Display rating next to subject's and manager's comment only 2: Display rating next to all evaluators' comments
behavior-cmt-opt	0: Show behavior item comments (and if applicable, the evaluator* rating)1: DEFAULT. Do not Show any behavior item comments or evaluator* ratings behavior-rating-opt
behavior-mode-opt	0: This is the Default mode. In this mode, the competency behaviors do not get displayed above or below the competency description. Behavior mode '0' supports the existing configuration, where a user manually rates on the behavior items and those ratings are used to generate a "Calculated Competency Rating" (if the Calculation on form is enabled in the form template XML). This mode is also used for backwards compatibility for existing forms. 1: When the behavior-mode-opt is set to '1', the Behavior items are dispalyed below the competency rating. Only the behaviors mapped to the job code are displayed. Therefore, this feature will only work when the user has a valid jobcode. If the competency does not have any behaviors, then, of course, none are displayed. 2: When the behavior-mode-opt is set to '2', the Behavior items are dispalyed above the competency rating. Only the behaviors mapped to the job code are displayed. Therefore, this feature will only work when the subject has a valid jobcode and `use-jobcode` is set to true. If the competency does not have any behaviors, then, of course, none are displayed. 4:When the behavior-mode-opt is set to '4', Competencies must be manually added to the form, and all behaviors for competencies added will be displayed on the form below the competency rating, regardless of the jobcode-behavior mappping. 5: When the behavior-mode-opt is set to '5', Competencies must be manually added to the form, and all behaviors for competencies added will be displayed on the form above the competency rating, regardless of the jobcode-behavior mappping. **Note** For option 4 and 5: This feature will only work when `use-jobcode` is set to false.

Option	What does it do?
in-summ-display	true ratings and weightings from this section will be displayed in the Summary Sect; default is true; in-summ-display="true" 
in-overall-rating	True ratings from this section are used in calculating the Calculated Form rating; default is true; the "bk" value is for backward compatibility.
no-group	True is default False = group selection is displayed if groups have been defined in the Meta section
use-subtopic	Do not use this attribute. Replaced by use-behavior
use-behavior	This attributed should be named *Rate-by-behaviors* since with the advent of behavior-mode-opt attribute It is possible to use behaviors but not rate by behaviors. It's purpose is to render behaviors under each competency and to calculate competency rating based on the behaviors
if-no-ratings-then-ignore-section	True is default; do not include this section in the Calculated Form rating if no competencies are rated False = use zero for this section in calculating the Calculated Form Rating
lock-item-weights	lock-item-weights=false. Allow the weight of each competency to be edited.  lock-item-weights=true. Does not allow the weight of competency to be edited. 
in-objcomp-summ-display	true if the section is to be displayed in the Objective Competency Summary section; default is false.
in-objcomp-summ-overall-rating	true if the section is to be included in the overall ratings in the Objective Compenency Summary section; default is false.
show-comp-expected-rating	true if showing the competency's expected rating for the job role, required for showing the gap between expected and actual competency rating; default is false
comp-expected-rating-format	0: Default. Showing the expected rating in % 1: Converting the % to a score normalized to the section scale
show-behavior-expected-rating	False: Default. Not showing behavior's expected rating for the job role
behavior-expected-rating-format	0: Default. Showing the expected rating in % 1: Converting the % to a score normalized to the section scale

Option	What does it do?
behavior-weighted	True : Behavior is weightedFalse : If equally weighted and no weight fields will be displayed for Behaviors
sect-mode	normal or EZ-Rater. EZ-Rater mode shows EZ-Rater rater ui, section summary and other item fields are ignored.
ez-rater-expand-all	true or false, if the section is in EZ-Rater mode, and this is true, then expand all objective details
show-calculated-section-rating	true or false. True if showing the section calculated rating.
hide-waca	Determines whether or not to hide the writing assistant. This is only applicable when the company or form template has been configured to display the writing assistant. True: hide writing assistant False: expose writing assistant
max-competencies-allowed	There is optional minimum/maximum threshold for the number of competencies that must/can be included on performance review and 360 forms. If specified, the validation will occur when a PM review is routed and when a 360 is being completed. If validation fails, the user will see a message and will not be able to route or complete the form.
min-competencies-required	*min-competencies-required: this represents the minimum number of competencies that must be in this section to allow the form to be routed. *max-competencies-allowed: this represents the maximum number of competencies that are allowed to be in this section, else the form can not be routed. You can set just a min, or just a max, or both.

13.5.4.3.1 Hardcoded competencies

For each competency to be hardcoded to the form include a set of tags shown immediately below, also shown in context of the full competency section further below.

> **Remember**
>
> As a customer, you do not have access to Provisioning. To complete tasks in Provisioning, contact SAP Cloud Support.

Hard Code Example

```
<fm-competency index="0" removable= " false ">
              <fm-comp-id>7</fm-comp-id>
               <fm-comp-name><![CDATA[ null]]></fm-comp-name>
               <fm-comp-desc><![CDATA[ null]]></fm-comp-desc>
</fm-competency>
```

In Context

```
<competency-sect index="4" configurable= " true " mgt-only= " false "
use-jobcode= " false " no-rate= " false " no-weight= " true " summ-opt= "99"
split-cmt= " false " rating-opt= "0" cmt-opt= "2" in-summ-display= " true "
in-overall-rating= " true " no-group= " true " if-no-ratings-then-ignore-section= "
false "
lock-item-weights= " false ">
```

```
        <comp-sect-name><![CDATA[Domain Skills]]></comp-sect-
name>
        <comp-sect-intro><![CDATA[Describe the individual's
demonstration of each of the job competencies listed below.
You can use the  "Writing Assistant" to review sample
descriptions of behaviors and performance levels to help you describe the employee's
performance.]]></comp-sect-intro>
      <fm-sect-config>
                      <section-color><![CDATA[darkgray]]></section-color>
                      <rating-label><![CDATA[Rating]]></rating-label>
                      <rating-label-others><![CDATA[Rating]]></rating-label-others>
                      < default-rating><![CDATA[unrated]]></ default-rating>
              </fm-sect-config>
               <sect-weight>0.0</sect-weight>
               <fm-sect-scale show-value= " true ">
                       <scale-id><![CDATA[Default Scale]]></scale-id>
                       <scale-type><![CDATA[null ]]></scale-type>
              </fm-sect-scale>
               <fm-competency index= "0" removable= " false ">
                      <fm-comp-id>7</fm-comp-id>
                      <fm-comp-name><![CDATA[ null]]></fm-comp-name>
                      <fm-comp-desc><![CDATA[ null]]></fm-comp-desc>
               </fm-competency>
```

13.5.4.3.2 Hardcoded competency weights

You can hard code competency weights, include a set of tags shown immediately below, also shown in context of the full competency section further below.

> **Remember**
>
> As a customer, you do not have access to Provisioning. To complete tasks in Provisioning, contact SAP Cloud Support.

Example

```
<fm-comp-weight><![CDATA[15.0]]></fm-comp-weight>
```

In Context

```
<?xml version="1.0" encoding= "UTF-8"?>
<!DOCTYPE competency-sect SYSTEM "sf-form.dtd">
<competency-sect index="3" configurable= " false " mgt-only= " false "
use-jobcode= " false " category-filter-opt= "no-filter" no-rate= " false "
no-weight= " false " summ-opt= "99" split-cmt= " false " rating-opt= "1"
cmt-opt= "2" suppress-item-comments= "0" behavior-rating-opt= "0" behavior-cmt-opt=
"1"
behavior-mode-opt= "0" in-summ-display= " true " in-overall-rating= " true "
no-group= " true " use-behavior= " false " if-no-ratings-then-ignore-section= "
false "
lock-item-weights= " false " in-objcomp-summ-display= " false " in-objcomp-summ-
overall-rating= " false "
show-comp-expected-rating= " false " comp-expected-rating-format= "0" show-behavior-
expected-rating= " false "
behavior-expected-rating-format= "0" behavior-weighted= " false " sect-mode=
"normal" ez-rater-expand-all= " false ">
         <comp-sect-name><![CDATA[Competencies]]></comp-sect-name>
         <comp-sect-intro><![CDATA[<b>Skills</b>]]></comp-sect-intro>
         <fm-sect-config>
              <rating-label><![CDATA[Leader Rating]]></rating-label>
```

```
                <rating-label-others><![CDATA[Associate Rating]]></rating-label-
others>
                < default-rating><![CDATA[Not Rated]]></ default-rating>
                <hidden-strength-threshold>0.0</hidden-strength-threshold>
                <blind-spot-threshold>0.0</blind-spot-threshold>
                <num-decimal-places>2</num-decimal-places>
                <publish-button-label><![CDATA[Publish Content]]></publish-button-
label>
          </fm-sect-config>
          <sect-weight>10.0</sect-weight>
          <fm-sect-scale show-value= " false ">
                <scale-source>1</scale-source>
               <scale-id><![CDATA[Competency Scale]]></scale-id>
                <scale-type><![CDATA[ null]]></scale-type>
          </fm-sect-scale>
          <fm-competency index= "0" removable= " false ">
                <fm-comp-id>4</fm-comp-id>
                <fm-comp-name><![CDATA[ null]]></fm-comp-name>
                <fm-comp-desc><![CDATA[ null]]></fm-comp-desc>
<fm-comp-weight><![CDATA[15.0]]></fm-comp-weight>
                   set  default value  for hardcoded competency weight
         </fm-competency>
         <fm-competency index= "1" removable= " false ">
               <fm-comp-id>1159</fm-comp-id>
                <fm-comp-name><![CDATA[ null]]></fm-comp-name>
               <fm-comp-desc><![CDATA[ null]]></fm-comp-desc>
         </fm-competency>
         <meta-grp-label><![CDATA[Group]]></meta-grp-label>
</competency-sect>
```

13.5.4.3.3 Restricting a Competency Section to Certain Categories

If you have a client who wants to populate different sections such as Job Description, Job Responsibilities, or Competencies, automatically via the Job Code, use the XML code shown below to populate each section with those competencies from the specified category. Set the Job Code parameter as: `use-jobcode="true"`

> **Remember**
>
> As a customer, you do not have access to Provisioning. To complete tasks in Provisioning, contact SAP Cloud Support.

When you build your Role in the Competency Family and Role Library, you attach all the appropriate Competencies to that Role. Then let the Form XML (described below) filter which Competencies belong in which Sections.

> **Note**
>
> The Job Description section currently supported only works with the Job Description Manager and not with the Job Profile Builder.

> **Caution**
>
> This is an all-or-nothing proposition. If you elect to auto-populate different form sections with different competencies, **all** sections that are auto-populating using Job Code must have a Category Filter assigned. To

trigger the category filter, you need to assign the `category-filter-opt` attribute with `specified-category`.

```
<fm-sect-scale show-value=" false ">
                  <scale-source>1</scale-source>
                  <scale-id><![CDATA[Competency Scale]]></scale-id>
                <scale-type><![CDATA[ null]]></scale-type>
         </fm-sect-scale>
         <comp-category><![CDATA[1. Thought Leadership (Development)]]></comp-category>
         <comp-category><![CDATA[2. Results Leadership (Development)]]></comp-category>
         <comp-category><![CDATA[3. People Leadership (Development)]]></comp-category>
              <fm-competency index= "1" removable= " false ">
                       <fm-comp-id>14</fm-comp-id>
                       <fm-comp-name><![CDATA[ null]]></fm-comp-name>
                       <fm-comp-desc><![CDATA[ null]]></fm-comp-desc>
               </fm-competency>
               <meta-grp-label><![CDATA[Group]]></meta-grp-label>
```

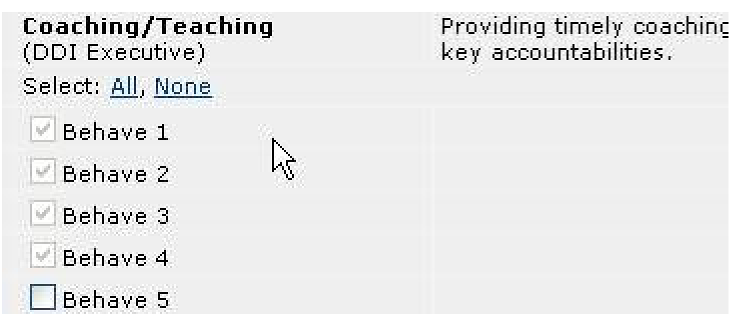
13.5.4.3.4 Allowing Users to Select Own Behaviors

You can manually add behaviors to a form, however, when you do so, you must either rate the behaviors or set the form to not rate competencies.

➡ Remember

As a customer, you do not have access to Provisioning. To complete tasks in Provisioning, contact SAP Cloud Support.

For this example:



The XML code is shown below:

```
<competency-sect index="3" configurable="true" mgt-only="false" use-jobcode="false"
        category-filter-opt="no-filter" no-rate="true" no-weight="true" summ-opt="9999"
        split-cmt="false" rating-opt="0" cmt-opt="2" suppress-item-comments="0"
        behavior-rating-opt="0" behavior-cmt-opt="1" behavior-mode-opt="0"
        in-summ-display="false" in-overall-rating="false" no-group="false"
        use-behavior="true" if-no-ratings-then-ignore-section="false"
        lock-item-weights="false" in-objcomp-summ-display="false"
        in-objcomp-summ-overall-rating="false" show-comp-expected-rating="false"
        comp-expected-rating-format="0" show-behavior-expected-rating="false"
```

```
        behavior-expected-rating-format="0" behavior-weighted="false" sect-
mode="normal"
        ez-rater-expand-all="false">
```

13.5.4.3.5 Display Behaviors but Rate at the Competency Level

Some clients want to have the behaviors display but only have users rate at the competency level rather than have behavior ratings averaged to generate a calculated competency rating.

> **Remember**
>
> As a customer, you do not have access to Provisioning. To complete tasks in Provisioning, contact SAP Cloud Support.

The example below auto-populates a job competency section with behaviors that are specific to the job code, that is, the competencies have behaviors at several different levels of proficiency and each behavior is mapped to a specific job code:

```
<competency-sect index="3" configurable="false" mgt-only="false"
          use-jobcode="true" category-filter-opt="no-filter" no-rate="false"
        no-weight="true" summ-opt="999" split-cmt="false" rating-opt="3"
        cmt-opt="0" suppress-item-comments="0" behavior-rating-opt="1"
          behavior-cmt-opt="1" behavior-mode-opt="2" in-summ-display="true"
        in-overall-rating="true" no-group="false" use-behavior="false"
        if-no-ratings-then-ignore-section="true" lock-item-weights="false"
        in-objcomp-summ-display="false" in-objcomp-summ-overall-rating="false"
        show-comp-expected-rating="false" comp-expected-rating-format="0"
        show-behavior-expected-rating="false" behavior-expected-rating-format="0"
        behavior-weighted="false" sect-mode="normal" ez-rater-expand-all="false"
        show-calculated-section-rating="true">
```

13.5.4.3.6 Rating and Comments for Behaviors

Attributes control the behavior of the rating and comments for behaviors in the competency section.

Here's an example of the XML for rating and comments for behaviors:

```
<competency-sect index="10" configurable="false" mgt-only="false"
        use-jobcode="false" category-filter-opt="no-filter" no-rate="false" no-
weight="true"
```

```
        summ-opt="99" split-cmt="false" rating-opt="0" cmt-opt="2"
          suppress-item-comments="0" behavior-rating-opt="0" behavior-cmt-opt="1"
          behavior-mode-opt="0" in-summ-display="true" in-overall-rating="true"
        no-group="true" use-behavior="true" if-no-ratings-then-ignore-section="true"
        lock-item-weights="false" in-objcomp-summ-display="false"
        in-objcomp-summ-overall-rating="false" show-comp-expected-rating="false"
        comp-expected-rating-format="0" show-behavior-expected-rating="false"
        behavior-expected-rating-format="0" behavior-weighted="false" sect-
mode="normal"
        ez-rater-expand-all="false" show-calculated-section-rating="true"
        lock-behavior-content="false">
```

List of Attributes that control the behavior of the rating and comments for behaviors

Attributes	Valid Values	Description
index	numeric	The order in which sections are displayed in the form is controlled by section index number starting with index="0". As a result, the form XML can list sections in any order. When you move sections using Provisioning the index number assigned to a section will be updated automatically to reflect how you have re-arranged the sections in the form.
configurable	true or false (default value is true)	Set this attribute to true to allow users to add or remove items within the section
mgt-only	true or false (default value is false)	Set this attribute to true to allow the manager or the HR to see this section;
use-jobcode	true or false (default value is false)	This attribute is set to true if the section is using subject's jobcode to auto-populate the section with related competencies
category-filter-opt	no-filter or specified-category)(default value is "no-filter")	To trigger the category filter, you need to assign the category-filter-opt attribute with specified-category.
no-rate	true or false (default value is false)	To enable using ratings in an objective or competency section set no-rate="false"
no-weight	true or false (default value is false)	Set this attribute to false to show item weights within the section, and to use the section's average rating in the form's calculated overall rating

Attributes	Valid Values	Description
summ-opt	numeric	Maximum number of section items for section summary to be displayed; Set the value of this attribute to "0" to turn on the section summary at all times Set the value of this attribute to a big number, say "99999" to turn off the section summary at all times
split-cmt	true or false (default value is false)	When this attribute is set to true subject and manager's comments are displayed side by side

Attributes	Valid Values	Description
rating-opt	numeric	The rating of record is the rating that is used in reports, the export process, and the dashboard for competency ratings, objectings and the overall rating in Performance Management reviews. The employee rating is never the rating of record unless the item-rating is permissioned so that only the employee can enter it. • **rating-opt=0**: All the users with permission shares one rating box for each item. This is known as the rating of record, also referred as the item-rating. Only the rating of record field (item-rating) is displayed and is editable by any user with write permissions for the field. The first user can set a rating of record until the next user changes it. The last user in the route map with write access has final say over the rating of record. • **rating-opt=1**: In Rating Option 1, everyone is able to edit the rating of record field (item-rating) until the fields are permissioned. For users updating the rating of record field, the last user in the route map with permission to this field will provide the final rating of record for the item. In addition to the rating of record field, the employee is also able to edit the unofficial user rating field (item-cmt-rating). The ideal configuration for the employee role is to grant read or none permission to the rating of record field (item-rating) which will prevent the employee from providing the rating of record (item-rating). • **rating-opt=2**: In Rating Option 2, everyone is able to edit both the rating of record field (item-rating) and the unofficial user rating field (item-cmt-rating) until the fields are permissioned. The user who should have the ability to provide the final

Attributes	Valid Values	Description
		rating of record should have write permission for the rating of record field (item-rating) and, should have at least read or write permission to the Unofficial user rating field (item-cmt-rating) so that they have visibility into the ratings provided by others. Users who should not have permission to update the rating of record field (item-rating) should have none permission for this field and read or write permission to the unofficial user rating field (item-cmt-rating). • **rating-opt=3**: One rating field appears for the subject of the form that only the subject can access. This is referred to as the subject-item-rating. Another rating appears for the manager, and this rating field can only be accessed by the manager. This is also know as the rating of record or item-rating, which is only displayed and can be written into by the EM (direct manager) role. The subject-item-rating field is displayed and is editable only by the subject of the form. No other users on the route map will be able to rate the form.
cmt-opt	numeric	cmt-opt=0 Show both item and section comments cmt-opt=1 Show only section comments, no item comments cmt-opt = 2. Show only item comments, no section comments cmt-opt=3 Show no item and section comments;

Attributes	Valid Values	Description
suppress-item-comments	numeric	0 (default value): do NOT suppress item comments (in other words, show item comments) 1: suppress behavior comments but allow competency comments 2: suppress competency comments but allow behavior comments 3: suppress item comments
behavior-rating-opt	numeric	0: DEFAULT. No ratings next to the subject's comment 1: Display rating next to subject's and manager's comment only 2: Display rating next to all evaluators' comments
behavior-cmt-opt	numeric	0: Show behavior item comments (and if applicable, the evaluator* rating) 1(default value): Do not Show any behavior item comments or evaluator* ratings behavior-rating-opt

Attributes	Valid Values	Description
behavior-mode-opt	numeric	0: This is the Default mode. In this mode, the competency behaviors do not get displayed above or below the competency description. Behavior mode '0' supports the existing configuration, where a user manually rates on the behavior items and those ratings are used to generate a "Calculated Competency Rating" (if the Calculation on form is enabled in the form template XML). This mode is also used for backwards compatibility for existing forms. 1: When the behavior-mode-opt is set to '1', the Behavior items are displayed below the competency rating. Only the behaviors mapped to the job code are displayed. Therefore, this feature will only work when the user has a valid jobcode. If the competency does not have any behaviors, then, of course, none are displayed. 2: When the behavior-mode-opt is set to '2', the Behavior items are displayed above the competency rating. Only the behaviors mapped to the job code are displayed. Therefore, this feature will only work when the subject has a valid jobcode and use-jobcode is set to true. If the competency does not have any behaviors, then, of course, none are displayed. 4:When the behavior-mode-opt is set to '4', Competencies must be manually added to the form, and all behaviors for competencies added will be displayed on the form below the competency rating, regardless of the jobcode-behavior mapping. 5: When the behavior-mode-opt is set to '5', Competencies must be manually added to the form, and all behaviors for competencies added will be displayed on the form above the competency rating, regardless of the jobcode-behavior mapping

Attributes	Valid Values	Description
		Note For option 4 and 5: This feature will only work when use-jobcode is set to false.
in-summ-display	true or false (default value is true)	Set this attribute to true if the section is to be displayed in the Summary Sect; Note the "bk" value is for backward compatibility.
in-overall-rating	true or false (default value is true)	Set this value to true if you want to include this section in the document overall rating calculation if applicable; default is true; Note the "bk" value is for backward compatibility.
no-group	true or false (default value is true)	If this attribute is set to false group selection is displayed if groups have been defined in the Meta section.

Attributes	Valid Values	Description
use-behavior	true or false	This attribute should be more aptly named rate-by-behaviors since with the advent of behavior-mode-opt attribute, it is possible to use behaviors but not rate by behaviors. **Note** When behavior-mode-opt is non-zero, use-behavior should not be set to true. In other words, if behavior-mode-opt is non- zero, then use-behavior MUST be false. If use-behavior is set to true, then the system may not be able to handle the competency section correctly. - When set to true, it renders behaviors under each competency and calculates competency rating based on the behavior(s).
if-no-ratings-then-ignore-section	true or false (default value is true)	If this attribute is set to true for a section, the section will not be included in the Calculated Form rating, if no competencies are rated. If this attribute is set to false use zero for this section in calculating the Calculated Form Rating
lock-item-weights	true or false (default value is false)	If the lock-item-weights attribute is set to false you will be allowed to edit the weight of each competency. If the lock-item-weights attribute is set to true you will NOT be allowed to edit the weight of each competency.
in-objcomp-summ-display	true or false (default value is false)	If this attribute is set to true the section is displayed in the How vs. What section; default value is false.
in-objcomp-summ-overall-rating	true or false (default value is false)	If this attribute is set to true the section is included in the overall ratings in the How vs. What section; default value is false.

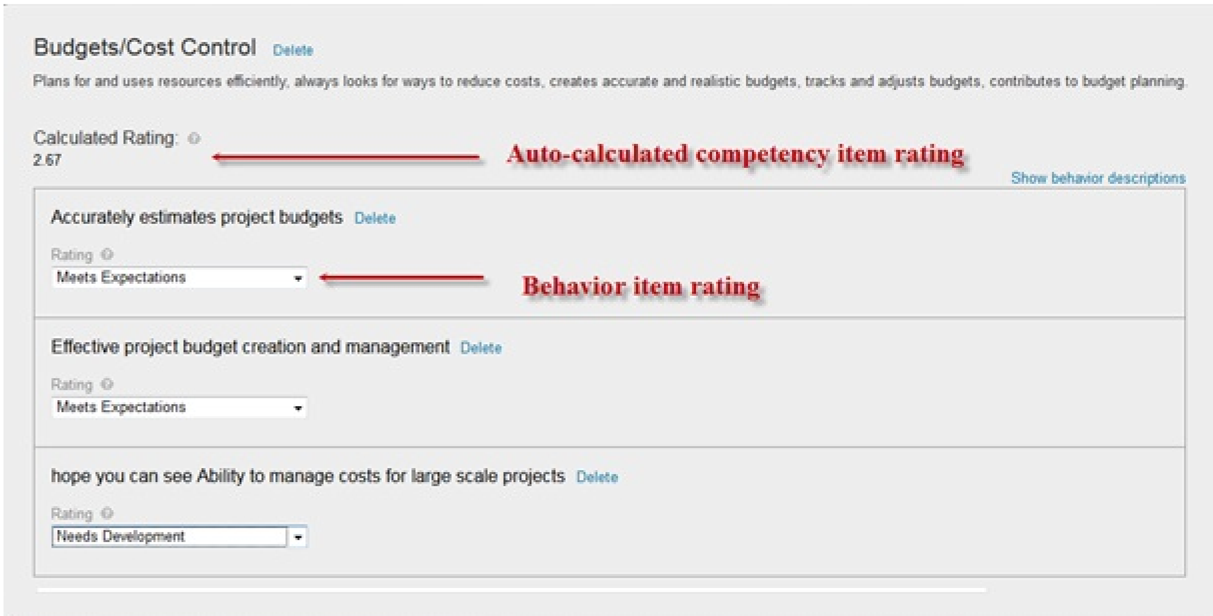
Attributes	Valid Values	Description
show-comp-expected-rating	true or false (default value is false)	If this attribute is set to true competency's expected rating for the job role is shown; default value is false
comp-expected-rating-format	numeric	0: If showing the expected rating in %; 1: If converting the % to a score normalized to the section scale; 0: Default value
show-behavior-expected-rating	true or false (default value is false)	If show-behavior-expected-rating is ture then default expected-beheavior-rating is shown for the job role, If it is set to "false" then the expected-beheavior-rating is shown for the job role .
behavior-expected-rating-format	numeric	0 if showing the expected rating in %; 1 if converting the % to a score normalized to the section scale; default value is 0;
behavior-weighted	true or false (default value is false)	I this attribute is set to "true" the Behavior is weighted. If this attribute is set to "false" the behavior is equally weighted and none of the weight fields are displayed for the Behaviors.
sect-mode	normal or EZ-Rater	When sect-mode is set to EZ-Rater mode the EZ-Rater rater UI is shown, section summary and other item fields are ignored.
ez-rater-expand-all	true or false	If the section is in EZ-Rater mode, and ez-rater-expand-all is set to "true", then all competency details will be expanded.
show-calculated-section-rating	true or false (default value is true)	If this attribute is set to "true" the section calculated rating will be shown on the form. Default is true for backward compatability.

Attributes	Valid Values	Description
lock-behavior-content	true or false (default value is false)	If behavior-mode-opt is set to 0, this attribute is assumed to be false. • behavior-mode-opt is non-zero and lock-behavior-content is set to false: Behavior list is not hardcored to the form during form creation and form modification and the behavior list is linked to the corresponding competency. In this case, when jobcode changes or the behavior name or the description is updated, the behavior for the existing form instances reflect the changes. • behavior-mode-opt is non-zero and lock-behavior-content is set to true: Behavior list is hardcoded to the form during form creation and form modification, rather than being linked to the corresponding competency. In this case, when jobcode changes or the behavior name or the description is updated, the behavior for the existing form instances do not reflect the changes.

13.5.4.3.7 Behavioral Assessments (competency auto-calculation)

When rating by behaviors, all behavior ratings are rolled into a calculated rating at the competency level.

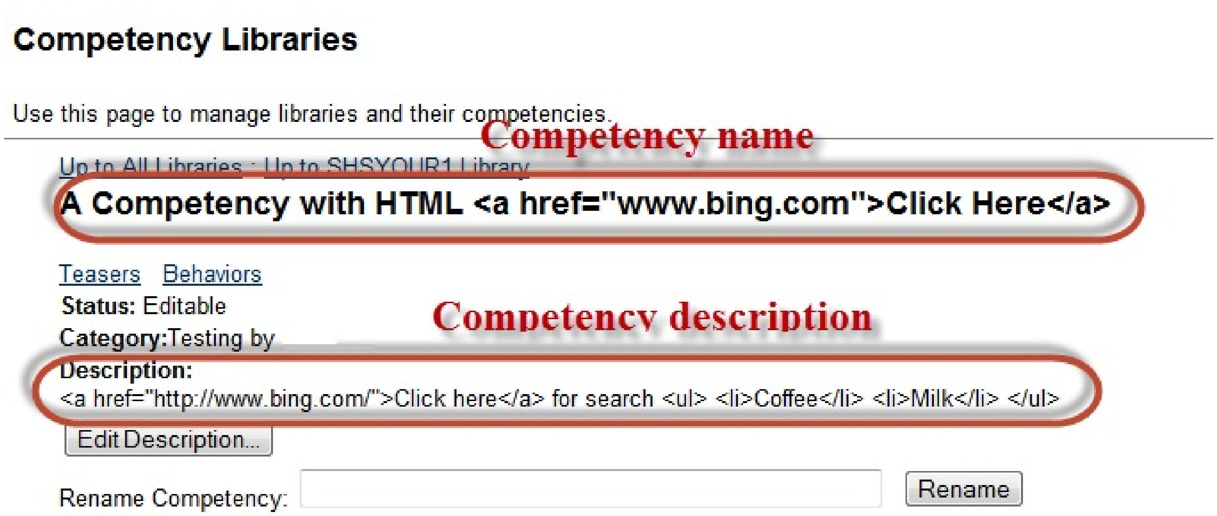
This calculated rating does not have a manual override at each individual competency.



13.5.4.3.8 Dealing with BARS (Behaviorally-anchored Rating Scales)

When a client has a competency such as Communication which has a behaviorally-anchored rating scale associated with it and it is different depending on their Tier 1, 2 and 3 positions, we recommend the following:

1. Embed the Behavior descriptions in the competency description itself – with a leading label like "level 1", "level 2" etc. Each competency can have the same leading labels on the assumption of the same number of levels/behaviors for each competency. Then the rating scale becomes a selection among "level 1", "level 2", etc, and the same rating scale can be used for all competencies, which allows you to use one section.
2. Create HTML documents for each competency describing proficiency at each level. This allows the user to click the link and view each competency one-by-one.
3. Put HTML tags in the competency name on the form.



4. Link to the new description page.

Note

We recommend that you use behaviors with job codes. Each competency may have 30 some behaviors associated with it but you can select 5 or 6 per role. It is also possible to define the different rating levels as part of the behavior for each role.

You need to take into account the following:

- Ease of use – how many clicks does a manager have to make to see what he or she needs?
- Form length – is the length of the form such that I can only see 1 competency per page?
- Maintainability – if you create multiple competencies per level or hard code sections with different rating scales – how easy/difficult will it be to update next year?
- Reporting – when you look at the dashboards or gap analysis – do you want to be able to show comparisons of what are essentially the same competence?

13.5.5 Goals Section

Goals is one of the main working sections in a form. This section is used to define all the objectives or goals that are to be evaluated during a review event.

A form can have several objective sections, for example, core company goals, and departmental goals.

Note

All objective sections work in the same way.

Goals sections are sometimes titled Performance Goals, Objectives and Accomplishments, or Business Objectives.

Goals sections can either start out blank, where you manually add the goals you want to review, or they can start out with the relevant goals already identified and listed in the form. In either case, once you have goals in the section, you can review them. Goals can be rated by manager only or by both the manager and employee or even by a third party.

Parent topic: Form Sections and Configuration by Type [page 218]

Related Information

User Info Section [page 219]
Review Info Section [page 222]
Form Introduction Section Type [page 224]
Competency Section [page 227]
Summary-sect [page 275]

13.5.5.1 Configuring the Attributes and the Elements in the Goals Section

From the Goals XML template you can configure the interface which is used for editing a goal.

To configure the XML template you need to get familiarized with the following:

- Attributes
- Elements

Attributes

Attributes are a list of options that affect the behavior of the element. For example, the attribute index controls the order in which the sections are displayed in the form.

Here's an example of the XML syntax of the attributes in goals:

```
<?xml version="1.0" encoding="UTF-8"?><!DOCTYPE objective-sect SYSTEM "sf-form.dtd">
<objective-sect index="3"
configurable="true"
mgt-only="false"
use-jobcode="false"
no-rate="false"
develop-goal="false"
show-learning-activity-competency="false"
no-weight="false"
summ-opt="0"
split-cmt="true"
rating-opt="0"
cmt-opt="0"
in-summ-display="true"
in-overall-rating="true"
no-group="false"
use-milestone="false"
if-no-ratings-then-ignore-section="false"
lock-item-weights="false"
in-objcomp-summ-display="true"
in-objcomp-summ-overall-rating="true"
auto-pop-weights="true"
show-obj-expected-rating="false"
min-goals-required="-2147483648"
max-goals-allowed="2147483647"
allow-draft-tgm-goals="false"
hide-addexistinggoals-btn="false"
```

```
sect-mode="normal"
ez-rater-expand-all="false"
obj-edit="popup"
show-calculated-section-rating="true"
avoid-obj-plan-state-change-by-multiple-forms="false"
use-mlt-rating-if-present="false"
exclude-private-goals="true">
```

This table describes the Attributes for Goals. You can set desired values for these attributes to define all the configuration options.

Attributes	Description	Can be configured from Manage Template Settings in Admin Center
Index	This is the order in which sections are displayed in the form. This is controlled by section index number starting with `index="0"`. As a result, the form XML can list sections in any order. When you move sections using Provisioning the index number assigned to a section is updated automatically to reflect how you have re-arranged the sections in the form.	No
configurable	Set to 'True' if users are allowed to add/remove items within the section. Set to 'False' if users are not allowed to add/ remove items within the section.	
mgt-only	Not supported.	
use-jobcode	Not supported.	
no-rate	Set to 'False' if rating scale for items appears within the section. Set to 'True' if rating scale for items does not appear within the section.	
develop-goal	Set to 'False' if the you are configuring this section for performance goals. Set to 'True' if the you are configuring this section for development goals.	
show-learning-activity-competency		
no-weight	Set to 'False' if item weights appears within the section, and the section's average rating will be used in the form's calculated overall rating; Set to 'True' if item weights does not appear within the section.	

Attributes	Description	Can be configured from Manage Template Settings in Admin Center
summ-opt	Not supported.	
split-cmt	Always `True`. Not supported in PMv12Accleration.	

<table>
<tr><th>Attributes</th><th>Description</th><th>Can be configured from Manage Template Settings in Admin Center</th></tr>
<tr><td>rating-opt</td><td>The rating of record is the rating that is used in reports, the export process, and the dashboard for competency ratings, objectings and the overall rating in Performance Management reviews. The employee rating is never the rating of record unless the item-rating is permissioned so that only the employee can enter it.
<table>
<tr><th>If you use this rating option</th><th>Then</th></tr>
<tr><td><code>rating-opt=0</code></td><td>All the users with permission shares one rating box for each item. This is known as the rating of record, also referred as the item-rating. Only the rating of record field (item-rating) is displayed and is editable by any user with write permissions for the field. The first user can set a rating of record until the next user changes it. The last user in the route map with write access has final say over the rating of record.</td></tr>
<tr><td><code>rating-opt=1</code></td><td>In Rating Option 1, everyone is able to edit the rating of record field (item-rating) until the fields are permissioned. For users updating the rating of record field, the last user in the route map with permission to this field will provide the final rating of record for the item. In addition to the rating of record field,</td></tr>
</table></td><td></td></tr>
</table>

<table>
<tr><th>Attributes</th><th>Description</th><th>Can be configured from Manage Template Settings in Admin Center</th></tr>
<tr><td></td><td>
<table>
<tr><th>If you use this rating option</th><th>Then</th></tr>
<tr><td></td><td>the employee is also able to edit the unofficial user rating field (item-cmt-rating). The ideal configuration for the employee role is to grant read or none permission to the rating of record field (item-rating) which will prevent the employee from providing the rating of record (item-rating).</td></tr>
<tr><td><code>rating-opt=2</code></td><td>In Rating Option 2, everyone is able to edit both the rating of record field (item-rating) and the unofficial user rating field (item-cmt-rating) until the fields are permissioned. The user who should have the ability to provide the final rating of record should have write permission for the rating of record field (item-rating) and, should have at least read or write permission to the Unofficial user rating field (item-cmt-rating) so that they have visibility into the ratings provided by others. Users who should not have permission to update the rating of record field (item-rating) should have none permission</td></tr>
</table>
</td><td></td></tr>
</table>

<table>
<tr><th>Attributes</th><th>Description</th><th>Can be configured from Manage Template Settings in Admin Center</th></tr>
<tr><td></td><td><table><tr><th>If you use this rating option</th><th>Then</th></tr><tr><td></td><td>for this field and read or write permission to the unofficial user rating field (item-cmt-rating).</td></tr><tr><td>rating-opt=3</td><td>One rating field appears for the subject of the form that only the subject can access. This is referred to as the subject-item-rating. Another rating appears for the manager, and this rating field can only be accessed by the manager. This is also know as the rating of record or item-rating, which is only displayed and can be written into by the EM (direct manager) role. The subject-item-rating field is displayed and is editable only by the subject of the form. No other users on the route map will be able to rate the form.</td></tr></table></td><td></td></tr>
<tr><td>cmt-opt</td><td><code>cmt-opt = 0</code> Show both item and section comments
<code>cmt-opt = 1</code>. Show only section comments, no item comments;
<code>cmt-opt = 2</code>. Show only item comments, no section comments;
<code>cmt-opt = 3</code>. Show no item and section comments;</td><td></td></tr>
</table>

Attributes	Description	Can be configured from Manage Template Settings in Admin Center
in-summ-display	Set to 'True' if the section is to be displayed in the Summary section of the form; Default value is true; the "bk" value is for backward compatibility. in-summ-display="true" Set to 'False' if you do not wish to display this section in the Summary section of the form.	
in-overall-rating	Set to 'True' if the section is to be included in the document overall rating calculation if applicable; default is true; the "bk" value is for backward compatibility. Set to 'False' if you do not wish to include this section in the document overall rating calculation.	
no-group	Not supported–this value is always set to 'False'.	
use-milestone	Not supported	
if-no-ratings-then-ignore-section	Set to 'True' if you do not wish to include this section in the Calculated Form rating when no competencies are rated. Set to 'False' to use 'zero' for this section while calculating the Calculated Form Rating. Default setting is true.	
lock-item-weights	Set to 'False' to allow the weight of each goal/objective to be edited. Set to 'True' to not allow the weight of each goal/objective to be edited.	
in-objcomp-summ-display	Set to 'True' to display this section in the How vs. What section; Set to 'False' to not allow this section to be displayed in the How vs. What section; Default value is false.	
in-objcomp-summ-overall-rating	Set to 'True' to include this section in the overall ratings in the How vs. What section; Set to 'False' to not allow this section to be included in the overall ratings in the How vs. What section. Default value is false.	

Attributes	Description	Can be configured from Manage Template Settings in Admin Center
auto-pop-weights	Set to 'True' if you want to auto populate the goal weights with their weights in the goal plan. Set to 'False' if you do not want to auto populate the goal weights with their weights in the goal plan.	
show-obj-expected-rating	Not supported	
min-goals-required	Represents the minimum number of goals that must be in this section to allow the form to be routed. **Note** These attributes correspond to an optional minimum/maximum threshold for the number of goals that must/can be included on performance review forms. If a threshold is specified, validation occurs when a Performance Management review is routed. If validation fails, the user receives a message and is not able to route or complete the form.	
max-goals-allowed	Represents the maximum number of goals that are allowed to be in this section, else the form cannot be routed. You can set just a min, or just a max, or both. **Note** These attributes correspond to an optional minimum/maximum threshold for the number of goals that must/can be included on performance review forms. If a threshold is specified, validation occurs when a Performance Management review is routed. If validation fails, the user receives a message and is not able to route or complete the form.	
allow-draft-tgm-goals	Not supported.	
hide-addexistinggoals-btn	This value is used when you don’t auto populate goals from the goal plan. You choose the goals manually.	

Attributes	Description	Can be configured from Manage Template Settings in Admin Center
sect-mode	Set the following mode: • Normal • EZ –Rater: EZ Rater mode shows the EZ Rater UI. Summary section and other item fields are ignored.	
ez-rater-expand-al	If the section is in EZ-Rater mode, and this value is set to 'True', then all objective details are expanded. If the section is in EZ-Rater mode, and this value is set to 'False', then all the objective details are not expanded.	
show-calculated-section-rating	`True` or `false. True` if showing the section calculated rating.	
obj-edit	Only pop-up is supported obj-edit = popup	
show-calculated-section-rating	Set to 'True' to show the Calculated Rating section. Set to 'False' to not show the Calculated Rating section.	
avoid-obj-plan-state-change-by-multiple-forms	Set to 'False' to allow users with multiple forms, using plan-states, to have the form routing steps change the state. Set to 'True' to not allow users with multiple forms, using plan-states, to have the form routing steps change the state.	
use-mlt-rating-if-present	When this feature is set to 'True' the MLT and rating from the Goal on Goal plan for rating calculation is considered.	
exclude-private-goals	When this feature is set to 'True', the private goals are excluded when creating a form. Also, you will not be able to add a new private objective to the form. This is used only in PMv12 Acceleration.	Yes

Elements

```
<obj-sect-name msgKey="5a452c1ee6314b349adecf73da9615df_1466712147084">
<![CDATA[Performance Goals]]></obj-sect-name>
  <obj-sect-intro><![CDATA[<p>Rate and comment on Performance Goals</p>
]]></obj-sect-intro>
```

```
  <fm-sect-config>
    <rating-label><![CDATA[Rating]]></rating-label>
    <rating-label-others><![CDATA[Rating]]></rating-label-others>
    <default-rating><![CDATA[unrated]]></default-rating>
    <unrated-rating><![CDATA[Too new to rate]]></unrated-rating>
    <hidden-strength-threshold>0.0</hidden-strength-threshold>
    <blind-spot-threshold>0.0</blind-spot-threshold>
    <num-decimal-places>2</num-decimal-places>
    <publish-button-label><![CDATA[Publish Content]]></publish-button-label>
  </fm-sect-config>
  <tab-permission type="enabled">
    <role-name>*</role-name>
    <tab refid="last-review-rating"/>
    <tab refid="goal-details"/>
    <tab refid="other-details"/>
    <tab refid="others-rating"/>
    <tab refid="achievements"/>
    <route-step stepid="*"/>
  </tab-permission>
  <sect-weight>33.3</sect-weight>
  <sect-weight-4-objcomp-summary>50</sect-weight-4-objcomp-summary>
  <fm-sect-scale show-value="false">
    <scale-source>1</scale-source>
    <scale-id><![CDATA[2005b]]></scale-id>
    <scale-type><![CDATA[null]]></scale-type>
  </fm-sect-scale>
  <obj-sect-type autosync="true"><![CDATA[corporate]]></obj-sect-type>
  <obj-sect-plan-id>11</obj-sect-plan-id>
  <meta-grp-label><![CDATA[Group]]></meta-grp-label>
</objective-sect>
```

This table describes the Elements for Goals:

Elements	Description	Can be configured from Manage Tepmplate Settings in Admin Center
obj-sect-name	The name of the section.	Yes
obj-sect-intro	Introductory text that appears in the section.	Yes

<table>
<tr><th>Elements</th><th>Description</th><th>Can be configured from Manage Tepmplate Settings in Admin Center</th></tr>
<tr><td>fm-sect-config</td><td>This element contains configurable options for any form sections.
<table>
<tr><th>Field</th><th>Description</th></tr>
<tr><td>rating-label</td><td>Label that corresponds to the Rating of Record field</td></tr>
<tr><td>rating-label-others</td><td>Label that corresponds to the Subject Rating or the Personal Rating, ratings other than the Rating of Record</td></tr>
<tr><td>default-rating</td><td>The default rating value when no value is selected.</td></tr>
<tr><td>unrated-rating</td><td>The rating value that can be selected by the user. This value is not included in the calculation.</td></tr>
<tr><td>hidden-strength-threshold</td><td>Not supported in PMv12A</td></tr>
<tr><td>blind-spot-threshold</td><td>Not supported in PMv12A</td></tr>
<tr><td>num-decimal-places</td><td>Number of decimals places to use when calculating the rating for this section</td></tr>
<tr><td>publish-button-label</td><td>Not supported in PMv12A</td></tr>
</table></td><td></td></tr>
</table>

Elements	Description	Can be configured from Manage Tepmplate Settings in Admin Center

tab-permission type	You can configure this option to allow customers to control the visibility of item tabs (competencies, goals) on a PM form. This enhancement hides the tab-related information on the PDF output.
	
	You can use role-name to assign a role and 'tab redif' to recognize a new tab. Here's an example: Permission type –none/enabled:
	
	`<tab-permission type="none">`
	`<role-name>*</role-name>`
	`<tab refid="last-review-rating"/>`
	`<tab refid="goal-details"/>`
	`<tab refid="other-details"/>`
	`<tab refid="others-rating"/>`
	`<tab refid="“learning-activities”>`
	`<route-step stepid="*"/> </tab-permission>`	

sect-weight	Specifies the weight for the section. Section weight can be predefined with element <sect-weight>xx.x</sect-weight>. Once the Performance Form is created, the predefined section weight is shown in Summary section. This element is available for Objective section and Competency section.	
sect-weight-4-objcomp-summary	Used to calculate the value if you have an obj-comp section. The number you choose allows you to apply a relative weighting for that objective section relative to other objective sections in the PM form. For example if you have two objective sections and you want them equally weighted you would assign the same number to both sections. Alternatively if one section was to be weighted more heavily, you could assign relative weightings to each sections.	

<table>
<tr><th>Elements</th><th>Description</th><th>Can be configured from Manage Tepmplate Settings in Admin Center</th></tr>
<tr><td>fm-sect-scale show-value</td><td>Provides details for configuring the rating scale in form template.
<table>
<tr><th>Rating Scale Elements</th><th>Description</th></tr>
<tr><td>scale-source</td><td></td></tr>
<tr><td>scale-id</td><td>The name of the rating scale to be used.</td></tr>
<tr><td>scale-type</td><td>Valid values include DROPDOWN
<![CDATA[null]]> or <![CDATA[DROP-DOWN]]>: drop down list</td></tr>
</table>
The default XML for rating scale configuration in form template is as follows:
<pre><code><fm-sect-scale show-
value="true">
<scale-source>1</scale-source>
<scale-id><![CDATA[5pt]]></
scale-id>
<scale-type><![CDATA[null]]>
</scale-type> ---- As per the
comment
on PMU-290, PMU doesn't support
BAR,
RADIO, FREETEXT scale
types </fm-sect-scale></code></pre></td><td></td></tr>
<tr><td>obj-sect-type</td><td>The obj-sect-type indicates how to populate the objective section:
• custom: if you do not want to auto-populate goals on a form when the form is created
• plan: if you want to auto-populate goals on a form when the form is created. If new goals are created in TGM after a form has been created, the user must manually add any new goals created to the form unless the autosync attribute is set to true.
• corporate: Not Supported
• user: Not Supported</td><td></td></tr>
<tr><td>meta-grp-label</td><td>Not Supported</td><td></td></tr>
</table>

Sample Code

```
<obj-plan-state-change to-complete-state="true">
<target-state id="A"></target-state>
</obj-plan-state-change>
<obj-plan-state-change on-form-delete="true">
<target-state id="B"></target-state> </obj-plan-state-change>
--> <!ELEMENT obj-plan-state-change (target-state)>
<!ATTLIST obj-plan-state-change to-step CDATA #IMPLIED to-complete-state (true |
false) "false" on-form-delete (true | false) "false" >
<!ELEMENT target-state EMPTY>
<!ATTLIST target-state id CDATA #REQUIRED >
```

Elements	Description	Can be configured from Manage Tepmplate Settings in Admin Center
obj-plan-state-change	This element is used to define the single goal plan state. Target state specifies the state to which the goal plan must be switched.	
to-complete-state	Using this attribute we can decide to change the obj plan state while routing the form to complete step.	
on-form-delete	Using this attribute we can decide to change the obj plan state while deleting the form.	

Note

You will not be able to specify to-step attribute while configuring either to-complete-state or on-form-delete attribute.

13.5.5.2 Including goals from a TGM plan

The objective section can also include goals from a TGM plan.

The fields and layout that are already defined in the TGM XML file appear on the PM form. It is defined by form-layout element in the TGM XML file.

Note

If you want to change these fields or change the layout of these fields, you need to edit the TGM XML file. Most permissions, such as field per mission, are controlled by the Goal Plan XML file

13.5.5.3 Determining which goals populate into a form section when using TGM

The value enclosed within the obj-sect-plan-id tags determines whether TGM goals are rendered into an objective section of a form. A number greater than 0 references the unique TGM goal plan ID.

Reference **plan** in the obj-sect-type element to auto-populate goals into the section.

```
<obj-sect-type><![CDATA[plan]]></obj-sect-type>
<obj-sect-plan-id>3</obj-sect-plan-id>
```

To auto-populate goals from a named category of a TGM plan on a form, list the goal categories that should be rendered into that section of the form where each goal category is enclosed within its own set of <obj-category> tags. Be sure to reference the internal id that was assigned to the goal category in the <category id> tag.

This example will auto-populate only the goals from the Customer and Financial categories into the same objective section of the form.

```
<obj-sect-type>
<![CDATA[plan]]></obj-sect-type><obj-sect-plan-id>3</obj-sect-plan-id>
<obj-category><![CDATA[Customer]]></obj-category>
<obj-category><![CDATA[Financial]]></obj-category>
```

To allow the user to manually add goals from the form to a TGM goal plan, reference group in the <obj-type> tag.

```
<obj-sect-type><![CDATA[plan]]></obj-sect-type>
<obj-sect-plan-id>3</obj-sect-plan-id>
<obj-type><![CDATA[custom]]></obj-type>
```

To auto-populate only user goals from TGM plan on a form, reference user in the <obj-type> tag. If no <obj-type> is specified, all goals will auto-populate.

```
<obj-sect-type><![CDATA[plan]]></obj-sect-type>
<obj-sect-plan-id>3</obj-sect-plan-id>
<obj-type><![CDATA[user]]></obj-type>
```

To auto synchronize goals between TGM plan and a form, set the **autosync** attribute to **true** in the <obj-sect-type> tag. If autosync is set to false goals will not synchronize between TGM plan and a form. The autosync attribute can appear 0 or 1 time in the <obj-sect-type> element. The autosync attribute only applies when plan is referenced in the <obj-sect-type> tag.

```
<obj-sect-type autosync=" true "><![CDATA[plan]]></obj-sect-type>
<obj-sect-plan-id>3</obj-sect-plan-id>
```

It is not recommended to use autosync on forms that are auto-populating a TGM plan into multiple objective sections on the form (based on category). This is because changing the category of an objective in the TGM plan will move the objective to a different section in the form. While the objective will move to the new section correctly, any ratings and comments associated to that objective will not be moved and will be lost.

13.5.5.4 Configuring Weights for Objectives

In order to:	Set the following parameters:
Have the goal weight from a TGM goal plan populate an objective section of a Performance Management form	no-weight="false" auto-pop-weights="true"
Allow users to specify the weight of each goal in the Performance Management form	no-weight="false" auto-pop-weights="false"
Have all goals in the Performance Management form equally weighted	no-weight="true" auto-pop-weights="false"

13.5.5.5 Configuring Tab Visbility Control

Tab permissions defined in the fm-meta are applied across all sections for the entire form. Tab permissions can be defined at a section level by adding the desired permissions to each section.

The tab-permission element is an optional sub-element of a competency-sect, objective-sect and fm-meta that controls visbility of the tabs within the sections.

Remember

As a customer, you do not have access to Provisioning. To complete tasks in Provisioning, contact SAP Cloud Support.

Type of Access (type attribute)

- enabled – user can see the tab
- none – user can't see the tab

Configuration is allowed for: learning-activities | others-rating | last-review-rating | goal-details | other-details

Note

- Learning Activities: Only applicable to development goal sections.
- Other Ratings: Applicable to performance goal, development goal, and competency sections.
- Last Review Rating: Only applicable to competency sections.
- Goal Details: Applicable to performance goal and development goal sections.
- Other Details: Applicable to performance goal and development goal sections.

XML Configuration

Permission type – none/enabled

```
<tab-permission type="none">
<role-name>*</role-name>
<tab refid="last-review-rating"/>
<tab refid="goal-details"/>
```

```
<tab refid="other-details"/>
<tab refid="others-rating"/>
<tab refid="learning-activities">
<route-step stepid="*"/>
</tab-permission>
```

13.5.5.6 Integrating TGM with Performance Appraisal Forms

The goals in a TGM plan can be auto-populated on to a performance appraisal form. .

When the form is created, any goals already created in TGM will be included in the form. Goals can also be auto-synchronized between a TGM plan and a performance appraisal form. When goals are changed, added, or removed from a TGM plan those changes automatically apply to the performance appraisal form.

13.5.5.7 Auto-populate

Goals in a TGM plan auto-populating on to a performance appraisal form without auto-synchronization have the following behaviors.

Change Made on my Plan	Results on Goal Section in Performance Management Form
Add a goal (after* form has been opened)	New goal does not show up
Add a goal (before* a form has been opened)	New goal automatically shows up (if configured)
Add target or task	New target or task Appears
Edit target, task, goal name, etc.	Changes appear
Remove a goal	Goal still appears; it is not deleted Message appears in red no longer exists on goal plan Can be removed from form

If new goals are created in TGM after a form has been created, the user must manually add any new goals created to the form (i.e. the auto-population is a one-time even that occurs when the form is created). If you ADD a goal to the Goal Plan AFTER the Form has been opened (created), the new goal added to the goal plan does not automatically show up (if auto-populate goals has been configured). You will need to *add goal* in the goal section on the Form.

Change ade on Goal Section in Performance Management Form	Results on my Goal Plan
Add a goal	New goal Appears
Add target or task	New target or task Apeears
Edit target, task. goal name, etc.	Changes appear
Remove a goal	Goal still appears - does not get deleted

13.5.5.8 Auto-synchronize

Changes to goals on a TGM plan will auto-synch to the form the next time the form is opened.

Auto-synchronization will only occur for forms in a modify route map step. Goals on forms in evaluation, signature, or completed steps will not be updated when TGM plans are changed. Goals in a TGM plan auto-populating on to a performance appraisal form and also auto-synchronizing have the following behaviors.

Change Made on My Goal Plan	Results on Goal Section in Performance Management Form
Add a goal (after* form has been opened)	New goal added to form
Add a goal (before* a form has been opened)	New goal automatically appears, if configured
Add target or task	New target or task appears
Edit target, task, goal name, etc	Changes appear
Remove a goal	Goal is deleted, however, there is no warning, message, indicating to the user that the goal has been deleted other than the goal no longer appears.

Changes to goals on a form will auto-synch to the TGM plan when the form is saved.

Change Made on Goal Section on Goal Section in Performance Management Form	Results on My Goal Plan
Add a goal	New goal appears
Add target or task	New target or task appears
Edit target, task, goal name, etc.	Changes appear
Remove a goal	Goal is deleted, however, there is no warning, message, indicating that the goal has been deleted other than that the goal no longer appears.

13.5.5.9 XML Example: Including TGM goals in a section

This example specifically creates an objective section in the form that maps only to the Customer goal category in TGM.

The XML syntax to integrate TGM goal weights with the form weights is also illustrated below.

- integrating TGM weights with weights on the form
- set no-weight="false"
- set auto-pop-weights="true"

```
<objective-sect index="4" configurable= " true " mgt-only= " false " use-
jobcode= " false " no-rate= " false " no-weight= " false " summ-opt= "0" split-
cmt= " false " rating-opt= "0" cmt-opt= "0" in-summ-display= " true " in-overall-
rating= " true " no-group= " false " use-milestone= " false " if-no-ratings-then-
ignore-section= " false " lock-item-weights= " false " in-objcomp-summ-
display= " false " in-objcomp-summ-overall-rating= " false " *auto-pop-
weights= " true ">
 <obj-sect-name><![CDATA[Customer Goals]]></obj-sect-name>
 <obj-sect-intro><![CDATA[Customer goals define how we work to deliver
unprecedented customer satisfaction and service. Customer goals generate
revenue and provide an unmatched experience that rewards customers and
```

```
clients for bringing us more of their business. ]]></obj-sect-intro>
      <fm-sect-config>
          <rating-label><![CDATA[Manager Rating]]></rating-label>
  <rating-label-others><![CDATA[Rating]]></rating-label-others>
  < default-rating><![CDATA[unrated]]></ default-rating>
  <hidden-strength-threshold><![CDATA[0.0]]></hidden-strength-threshold>
  <blind-spot-threshold><![CDATA[0.0]]></blind-spot-threshold>
 </fm-sect-config> <sect-weight><![CDATA[20.0]]></sect-weight>
 <fm-sect-scale show-value=" false ">
   <scale-id><![CDATA[Default Scale]]></scale-id>
   <scale-type><![CDATA[null ]]></scale-type>
</fm-sect-scale> <obj-sect-type><![CDATA[plan]]></obj-sect-type>
<obj-sect-plan-id>1</obj-sect-plan-id> <obj-category><![CDATA[Customer]]></obj-
category>
<meta-grp-label><![CDATA[Group]]></meta-grp-label>
</objective-sect>
```

13.5.5.10 XML Example: Objective section with Permissions

Example with Name and Intro XML:

- Requiring weighting of 100%*
- Rating and min-max Weight XML*
- Required Fields and Permission*
- Changing Default Item and Section Comments Labels*
- Field Permissions*
- Auto-Populating Objectives into Form and selecting category.*

```
<objective-sect index="2" configurable= " true " mgt-only= " false " use-jobcode= "
false " no-rate= " false " develop-goal= " false " show-learning-
activity-competency= " false " no-weight= " false " summ-opt= "0" split-cmt= "
false " rating-opt= "0" cmt-opt= "2" in-summ-display= " true " in-overall-
rating= " true " no-group= " true " use-milestone= " false " if-no-ratings-then-
ignore-section= " false " lock-item-weights= " false " in-objcomp-summ-display= "
false " in-objcomp-summ-overall-rating= " false " auto-pop-weights= " true " show-
obj-expected-rating= " false " min-goals-required= "-
2147483648" max-goals-allowed= "2147483647" allow-draft-tgm-goals= " false ">
          <obj-sect-name><![CDATA[MBOs - October, 2005]]></obj-sect-name>
                <obj-sect-intro><![CDATA[<b>Instructions:</b>
                  Please review each MBO and select the percentage of achievement
in the "Rating on Objective" drop down list.
                  Please add examples and comments in the comments section.   The
"spell check" and  "legal scan" tabs will help
                  ensure that your comments are written professionally.
                  [[POPUP|Do you need help writing an MBO?|https: //
salesdemo.successfactors.com/doc/po/goals_objectives/writg.html]]</p>]]>
               </obj-sect-intro>
         <fm-sect-config>
                  <rating-label><![CDATA[Rating on Objective]]></rating-label>
                  <rating-label-others><![CDATA[Rating]]></rating-label-others>
                  < default-rating><![CDATA[Unrated]]></ default-rating>
               <weight-total><![CDATA[100.0]]></weight-total>
               <hidden-strength-threshold>0.0</hidden-strength-threshold>
               <blind-spot-threshold>0.0</blind-spot-threshold>
                <item-weights>
                     <item-weight-floor>0.0</item-weight-floor>
                     <item-weight-ceiling>100.0</item-weight-ceiling>
                </item-weights>
           <required-fields>
                 <role-name>*</role-name>
```

```
                  <field refid= "item-rating" min-value= "-1.0" max-value= "-1.0"/>
                   <field refid= "item-weight" min-value= "-1.0" max-value= "-1.0"/>
                   <route-step stepid= "*"/>
                   <send-action sendid= "next_step"/>
            </required-fields>
         < default-section-comments-label><![CDATA[Comments by {0}]]>
          </ default-section-comments-label>
              < default-item-comments-label><![CDATA[Comments by {0}]]>
                </ default-item-comments-label>
                <weight-total-option><![CDATA[enforce]]></weight-total-option>
                <num-decimal-places>2</num-decimal-places>
                   <publish-button-label><![CDATA[Publish Content]]></publish-button-
label>
          </fm-sect-config>
             <field-permission type= "read">
                   <role-name>*</role-name>
                   <field refid= "item-rating"/>
                     <field refid= "item-weight"/>
             </field-permission>
             <field-permission type= "write">
                   <role-name>EM</role-name>
                      <field refid= "item-rating"/>
                       <field refid= "item-weight"/>
              </field-permission>
             <others-ratingtab-item-permission type="none">
                   <role-name>*</role-name>
                       <tab-item refid="item-rating"/>
                       <route-step stepid="1"/>
                       <route-step stepid="2"/>
              </others-ratingtab-item-permission>
   <sect-weight>100.0</sect-weight>
   <fm-sect-scale show-value= " false ">
       <scale-source>1</scale-source>
       <scale-id><![CDATA[Objectives]]></scale-id>
       <scale-type><![CDATA[null ]]></scale-type>
   </fm-sect-scale>
             <obj-sect-type><![CDATA[plan]]></obj-sect-type>
              <obj-sect-plan-id>10</obj-sect-plan-id>
               <obj-category><![CDATA[Q4October]]></obj-category>
    <meta-grp-label><![CDATA[Group]]></meta-grp-label></objective-sect>
```

13.5.5.11 XML Example: Setting ceiling and floor weights and enforcing weight total to 100

Note

If you need weight enforcement on a form without ratings, you must ensure that `no-rate="false"`, and then you must hide the ratings from everyone. The form must be rated to account for weights, even if the form isn't factoring ratings in. When `no-rate="true"`, the user cannot edit ratings.

If an item weight floor and/or ceiling is specified, by default a warning is displayed to the user when a weight falls outside of the floor and ceiling. This warning will not prevent a user from routing the form to another reviewer. If you would rather force the user to correct the out-of-range item weight before the form can be routed than configure the warning as an error instead.

Some customers wish to ensure that the goals/objectives of the goal section add up to 100% rather than rely on a relative section weighting approach. There are two options when enforcing weights at 100%: Enforce (hard enforce option) – this option forces users to have all goal weights add up to 100% or they will not be able to save or forward the form.Warn (soft enforce option) – if users neglect to include weights for each goal, upon saving the form or routing the form to the next user they will be prompted to go back and add the weights. They have the option of still saving/forwarding the form without the weights.

Using the meta section to set ceiling and floor weights

```
<fm-meta>
 <meta-form-id>-1</meta-form-id>
 <meta-rated>true</meta-rated>
 <meta-rating>0.0</meta-rating>
 <meta-scale>0.0</meta-scale>
 <meta-grp-label><![CDATA[Balance Scorecard]]></meta-grp-label>
 <meta-grp><![CDATA[Customer]]></meta-grp>
 <meta-grp><![CDATA[Financial]]></meta-grp>
 <meta-grp><![CDATA[Learning]]></meta-grp>
 <meta-grp><![CDATA[Operations]]></meta-grp>
 <fm-sect-scale show-value="true">
   <scale-id><![CDATA[Default Scale]]></scale-id>
   <scale-type><![CDATA[null]]></scale-type>
 </fm-sect-scale>
 *<meta-item-weight-floor-ceiling-option>warning</meta-item-weight-floor-ceiling-
option>*
</fm-meta>
```

To display an error message, replace *warning* with *error* as shown:

```
<meta-item-weight-floor-ceiling-option>error</meta-item-weight-floor-ceiling-option>
```

Example Objective Section

- - *- Ensure that item weights total 100
- Set item floor and ceiling weights to impose a min and max weight and warn the user when not met; otherwise omit tags to not validate

```
<?xml version="1.0" encoding="UTF-8"?><!DOCTYPE objective-sect SYSTEM "sf-
form.dtd"><objective-sect index="9" configurable="true" mgt-only="false" use-
jobcode="false"
        no-rate="false" develop-goal="false" show-learning-activity-
competency="false"
        *no-weight="false"* summ-opt="99" split-cmt="false" rating-opt="1" cmt-
opt="2"
        in-summ-display="true" in-overall-rating="true" no-group="true"
        use-milestone="false"if-no-ratings-then-ignore-section="false"
        *lock-item-weights="false"* in-objcomp-summ-display="false"
        in-objcomp-summ-overall-rating="false" auto-pop-weights="true"
        show-obj-expected-rating="false" min-goals-required="-2147483648"
        max-goals-allowed="2147483647" allow-draft-tgm-goals="false">
   <obj-sect-name><![CDATA[ Review of Goals]]></obj-sect-name>
   <obj-sect-intro><![CDATA[ Setting clear goals ensures we focus on delivering an
agreed set of results.
<ul> <li>Your goals will be created in consultation with your Manager.</li>
<li>The SMART accronym helps to identify the components of a clear performance
goal.<br>
<b>S</b>...specific<br>
<b>M</b>...measurable<br>
<b>A</b>...achieveable and aligned<br>
<b>R</b>...relevant<br>
<b>T</b>...time bound </li>
</ul><b>Discuss and evaluate with your manager the extent to which each goal was
achieved.</b>
```

```
]]></obj-sect-intro>
  <fm-sect-config>
  <rating-label><![CDATA[Manager Rating]]></rating-label>
   <rating-label-others><![CDATA[Member Rating]]></rating-label-others>
        <default-rating><![CDATA[unrated]]></default-rating>
        <weight-total><![CDATA[100.0]]></weight-total>
        <hidden-strength-threshold>0.0</hidden-strength-threshold>
        <blind-spot-threshold>0.0</blind-spot-threshold>
      <item-weights>
        <item-weight-floor>5.0</item-weight-floor>
        <item-weight-ceiling>100.0</item-weight-ceiling>
      </item-weights>
      <section-permission type="disabled">
          <role-name>*</role-name>
         <route-step stepid="1"/>
      </section-permission>
      <required-fields>
         <role-name>*</role-name>
         <field refid="item-rating" min-value="-1.0" max-value="-1.0"/>
         <field refid="item-weight"  min-value="-1.0" max-value="-1.0"/>
         <route-step stepid="*"/>
         <send-action sendid="next_step"/>
      </required-fields>
        <weight-total-option><![CDATA[enforce]]></weight-total-option>
        <num-decimal-places>2</num-decimal-places>
      <publish-button-label><![CDATA[Publish Content]]></publish-button-label>
   </fm-sect-config>
   <sect-weight>50.0</sect-weight>
   <fm-sect-scale show-value="false">
      <scale-source>1</scale-source>
      <scale-id><![CDATA[Default Scale]]></scale-id>
        <scale-type><![CDATA[null]]></scale-type>
   </fm-sect-scale>
        <obj-sect-type><![CDATA[plan]]></obj-sect-type>
   <obj-sect-plan-id>2</obj-sect-plan-id>
    <meta-grp-label><![CDATA[Group]]></meta-grp-label>
</objective-sect>
```

13.5.6 Summary-sect

The Summary section displays summarized information about all the evaluated sections on the form in one central area. For example, if you rate two goal sections and two competency sections in your form, summaries about the content in all four sections would be shown in the Overall Summary section.

This section is sometimes titled Overall Performance Summary or Assessment Summary. The amount of summarized information is determined by the content in the working sections of the form. For example, if your form includes ratings and weights, the average score from these values is shown for each section, as well as a general overall performance score.

The Overall Summary section can include a Calculated Overall Rating, a Manual Overall Rating or both. The rating labels are configurable. In a summary section, manual rating is the rating of record when both manual and calculated ratings are options. If there is only a calculated rating, this becomes the rating of record

About the Summary-sect [page 276]
The Summary section displays summarized information about all the evaluation sections on the form in one central area.

Configuring the Attributes and Elements in the Summary Section [page 278]
From the Summary XML template you can configure the interface which is used for editing the Summary Section of the form.

XML Example: Customizing Rating Labels [page 281]
To change the rating labels displayed for the overall rating or calculating score, add the following XML syntax.

XML Example: Specifying the Summary Section Rating Scale [page 282]
To specify the rating scale that is used in the summary section, you must reference the scale in the form's meta section; the scale is not mapped in the summary section

XML Example: Forced Manual Rating of Overall Performance [page 283]
Performance Management allows the administrator to force manual rating of overall performance. This is configured in the summary section.

XML Example: Configuring Enforce Maximum Overall Score (EMOS, or "Fail one, fail all") [page 284]
Performance Management v12 Acceleration allows an administrator to limit the maximum manual overall score that a rater can grant to a form subject if any item rating in the form is below a certain minimum.

Parent topic: Form Sections and Configuration by Type [page 218]

Related Information

User Info Section [page 219]
Review Info Section [page 222]
Form Introduction Section Type [page 224]
Competency Section [page 227]
Goals Section [page 253]

13.5.6.1 About the Summary-sect

The Summary section displays summarized information about all the evaluation sections on the form in one central area.

For example, if you have two goal sections and two competency sections in your form, summaries about the content in all four sections would be shown in the Overall Summary section. This section is sometimes called Overall Performance Summary or Assessment Summary. The amount of summarized information is determined by the content in the working sections of the form. For example, if your form includes ratings and weights, the average score from these values is shown for each section, as well as a general overall performance score. The Overall Summary section can include a Calculated Overall Rating, a Manual Overall Rating or both. The rating labels are configurable. In a summary section, manual rating is the rating of record when both manual and calculated ratings are options. If there is only a calculated rating, this becomes the rating of record.

The summary-sect:

- Can include an overall rating, which is manually set or calculated.
- Can display an overall non-editable calculated score for the form.
- Can display a summary list of objectives and competencies with ratings and weights.
- Can include a section comment box.
- Displays final ratings in a completed form as text, graphical bars or both

If a meta group is defined you can display a matrix summary showing how many objectives/competencies there are in each group, however, this is rarely used.

Note

For customers who are using Manual Overall Rating in Performance Management v12 Acceleration, the behavior is identical to the behavior found in Performance Management v11. This means that there is no personal version of the manual rating in the summary section. The overall rating in the summary section cannot have ownership roles assigned to it. There is only one official manual overall rating, and anyone who has permission to it is effectively updating the same rating.

For customers whose processes dictate that the employee should be able to record an overall score, the solution does not offer a work-around. Users may create a custom section that includes a custom field. The custom field would be used by the employee to record his manual overall score.

The manual-rating option determines if a form reviewer can set the overall rating manually, `true`or if the overall rating should be calculated and not able to be edited, `false`.

Example

You want to allow reviewers to manually set the overall rating instead of using a calculated rating when you want the overall rating to be a whole number rather than a decimal number, for example, if a calculated rating is 2.3, the reviewer can set the overall rating to 2.0

Parent topic: Summary-sect [page 275]

Related Information

Configuring the Attributes and Elements in the Summary Section [page 278]
XML Example: Customizing Rating Labels [page 281]
XML Example: Specifying the Summary Section Rating Scale [page 282]
XML Example: Forced Manual Rating of Overall Performance [page 283]
XML Example: Configuring Enforce Maximum Overall Score (EMOS, or "Fail one, fail all") [page 284]

13.5.6.2 Configuring the Attributes and Elements in the Summary Section

From the Summary XML template you can configure the interface which is used for editing the Summary Section of the form.

To configure the XML template you need to get familiarized with the following:

- Attributes
- Elements

Here’s an example of the XML syntax of the attributes in goals:

```
<?xml version="1.0" encoding="UTF-8"?>
<!DOCTYPE summary-sect SYSTEM "sf-form.dtd">
<summary-sect
    index="8"
    mgt-only="false"
    manual-rating="true"
    override-unrated="true"
    split-cmt="true"
    rating-opt="1"
    cmt-opt="0"
    show-listing="true"
    rating-mode="text"
    use-adjusted-scale-for-section-header-rating="0"
    show-group-matrix="true"
    overall-rating-display-order="manual-calc">
  <summary-sect-name><![CDATA[Summary]]></summary-sect-name>
  <summary-sect-intro><![CDATA[]]></summary-sect-intro>
  <fm-sect-config>
    <rating-label><![CDATA[Rating]]></rating-label>
    <rating-label-others><![CDATA[Rating]]></rating-label-others>
    <default-rating><![CDATA[unrated]]></default-rating>
    <unrated-rating><![CDATA[Too new to rate]]></unrated-rating>
    <hidden-strength-threshold>0.0</hidden-strength-threshold>
    <blind-spot-threshold>0.0</blind-spot-threshold>
    <num-decimal-places>2</num-decimal-places>
    <publish-button-label><![CDATA[Publish Content]]></publish-button-label>
  </fm-sect-config>
      <show-gap-competencies-in-summary/>
      <allow-close-individual-gap-in-summary/>
      <show-gap-behaviors-in-summary/>
      <show-behaviors-in-summary/>
```

```
</summary-sect>
```

Attributes

Attributes are a list of options that affect the behavior of the element. For example, the attribute index controls the order in which the sections are displayed in the form.

Option	Valid values	Description
Index	Numeric	The order in which sections are displayed in the form is controlled by section index number starting with index="0". As a result, the form XML can list sections in any order. When you move sections using Provisioning the index number assigned to a section will be updated automatically to reflect how you have re-arranged the sections in the form.
mgt-only		obsolete
ask-4-comment		obsolete; set to "false" always
manual-rating		true to allow a user to put an overall rating that is different from the calculated one (if any); if set to false, the summary-rating is the same as the calculated rating and fm-sect-scale is ignored if any, and users are not allowed to override it.
override-un-rated		This is applicable only if manual-rating is true. • If manual rating is false, override-unrated is ignored. • If manual-rating is true and override-unrated is false, then the overall rating is always the manual rating. • If manual-rating is true and override-unrated is true, then the overall rating will be the manual rating unless the manual rating is unrated, • If the manual rating is unrated, then the overall rating will default back to the calculated rating.
split-cmt		true if displaying subject and manager's comments side by side
rating-opt		0: default, no ratings next to each user's comment
cmt-opt		0: Show section comments; default 1: No section comments;
show-listing		true if allow listing; false if not; default is true
rating-mode		"text" - default; display ratings in text "graph" - display ratings in graphical form; "mixed" - display ratings in both text and graphical forms. If you use "graph" or "mixed" for rating-mode the graphical rating bars only appear in a completed document. 

Option	Valid values	Description
use-adjusted-scale-for-section-header-rating		Controls how the overall section rating is displayed in the summary section. If using text-based ratings you have the option of having subtotals use the same adjusted scale values from the meta section. 0 - DEFAULT: display the manual/calculated rating. For calculated, there is no rating label just rating value. 1 – Text only --take the calculated/manual section rating and use the adjusted scale (defined in the meta section) to display the adjusted rating label and/or the adjusted rating value. 2 -
show-group-matrix:		true if allow group matrix display in the section; default is true

Elements

This table describes the Elements for Goals:

Element	Description
summary-sect-name	The name of the section. See fm-sect-name for details.
summary-sect-intro	Introductory text that appears in the section. See fm-sect-intro for details.
fm-sect-config	Controls the color of the section. See fm-sect-config for details.
fm-sect-config	See fm-sect-config for details.
field-permission	See field-permission for details.
fm-sect-scale	Obsolete. It is replaced by fm-sect-scale in fm-meta if any.
summary-rating	Overall rating of the PM form if any. This defaults to the calculated average of all sections included in overall calculation.
calc-summary-rating	Calculated Overall rating of the PM form if any.
unadjusted-overall-summary-rating	the actual calculated overall form rating (ie, before any adjustments based on the adjusted-scale.
overall-rating-label	A non-zero-length string (including whitespace) will over-ride the default "Overall Form Rating" label. For example: `<overall-rating-label><![CDATA[Overall Ranking:]]></overall-rating-label>`
calc-rating-label	A non-zero-length string (including whitespace) will over-ride the default "Calculated Form Rating" label. For example: <calc-rating-label><![CDATA[Computed Ranking (4 = 100%):]]></calc-rating-label>
group-matrix-other-label	A non-zero-length string (including whitespace) will over-ride the default "Other" label.

Element	Description
show-gap-behaviors-in-summary	The behaviors for each competency, if rated by behavior, is shown in the summary section of the form along with the gap analysis.
show-behaviors-in-summary	The behaviors for each competency, if rated by behavior, is shown in the summary section of the form.
show-gap-competencies-in-sum-mary	The gap analysis scale for competencies will appear in the Summary section of the form.
allow-close-individual-gap-in-sum-mary	If this element is added to the Summary section of the form a clickable link will be available in the form for each competency item to add related development goal.

Parent topic: Summary-sect [page 275]

Related Information

About the Summary-sect [page 276]
XML Example: Customizing Rating Labels [page 281]
XML Example: Specifying the Summary Section Rating Scale [page 282]
XML Example: Forced Manual Rating of Overall Performance [page 283]
XML Example: Configuring Enforce Maximum Overall Score (EMOS, or "Fail one, fail all") [page 284]

13.5.6.3 XML Example: Customizing Rating Labels

To change the rating labels displayed for the overall rating or calculating score, add the following XML syntax.

See sf-form.dtd for details on the summary section configuration options.

```
<summary-sect
index="5", mgt-only="false", manual-rating="true", override-unrated="true",
split-cmt="false", rating-opt="0", cmt-opt="0", show-listing="true",
rating-mode="text", use-adjusted-scale-for-section-header-rating="0",
show-group-matrix="true">
<summary-sect-name><![CDATA[Review Summary]]></summary-sect-name>
<summary-sect-intro><![CDATA[ [[LIST|Overall form rating (manual rating)
trumps calculated form rating|<b>override-unrated="true"</b> will use the
calculated rating only if the manual rating is unrated |show-group-matrix is a BOM
feature.]]]]>
</summary-sect-intro>
 <fm-sect-config>
      <rating-label><![CDATA[Rating]]></rating-label>
      <rating-label-others><![CDATA[Rating]]></rating-label-others>
      < default-rating><![CDATA[unrated]]></default-rating>
      <hidden-strength-threshold>0.0</hidden-strength-threshold>
      <blind-spot-threshold>0.0</blind-spot-threshold>
      <num-decimal-places>2</num-decimal-places>
      <publish-button-label><![CDATA[Publish Content]]></publish-button-label>
 </fm-sect-config>
   <overall-rating-label><![CDATA[Overall Form Rating]]></overall-rating-label>
```

```
    <calc-rating-label><![CDATA[Calculated Form Score]]></calc-rating-label>
    <group-matrix-other-label><![CDATA[Rating Not Specified]]></group-matrix-other-
label>
</summary-sect>
```

Parent topic: Summary-sect [page 275]

Related Information

About the Summary-sect [page 276]

Configuring the Attributes and Elements in the Summary Section [page 278]

XML Example: Specifying the Summary Section Rating Scale [page 282]

XML Example: Forced Manual Rating of Overall Performance [page 283]

XML Example: Configuring Enforce Maximum Overall Score (EMOS, or "Fail one, fail all") [page 284]

13.5.6.4 XML Example: Specifying the Summary Section Rating Scale

To specify the rating scale that is used in the summary section, you must reference the scale in the form's meta section; the scale is not mapped in the summary section

```
<fm-meta>
 <meta-form-id>-1</meta-form-id>
 <meta-rated>true</meta-rated>
<meta-rating>0.0</meta-rating>
<meta-scale>0.0</meta-scale>
<meta-grp-label><![CDATA[Balance Scorecard]]></meta-grp-label>
<meta-grp><![CDATA[Customer]]></meta-grp>
<meta-grp><![CDATA[Financial]]></meta-grp>
<meta-grp><![CDATA[Learning]]></meta-grp>
<meta-grp><![CDATA[Operations]]></meta-grp>
<fm-sect-scale show-value=" true ">
  <scale-id><![CDATA[Summary Scale]]></scale-id>
  <scale-type><![CDATA[ null]]></scale-type>
 </fm-sect-scale>
 <meta-item-weight-floor-ceiling-option>warning</meta-item-weight-floor-ceiling-
option></fm-meta>
```

Parent topic: Summary-sect [page 275]

Related Information

About the Summary-sect [page 276]

Configuring the Attributes and Elements in the Summary Section [page 278]

XML Example: Customizing Rating Labels [page 281]

XML Example: Forced Manual Rating of Overall Performance [page 283]
XML Example: Configuring Enforce Maximum Overall Score (EMOS, or "Fail one, fail all") [page 284]

13.5.6.5 XML Example: Forced Manual Rating of Overall Performance

Performance Management allows the administrator to force manual rating of overall performance. This is configured in the summary section.

```
<?xml version="1.0" encoding="UTF-8"?>
<!DOCTYPE summary-sect SYSTEM "sf-form.dtd">
<summary-sect index="10" mgt-only="false" *manual-rating="true"* override-
unrated="false" split-cmt="false" *rating-opt="0"* cmt-opt="0" show-listing="false"
*rating-mode="text*" use-adjusted-scale-for-section-header-rating="0" show-group-
matrix="true">
   <summary-sect-name><![CDATA[Review Summary]]></summary-sect-name>
   <summary-sect-intro><![CDATA[Manager should set an Overall form rating.
Document any special considerations used to determine this Overall rating.]]></
summary-sect-intro>
  <fm-sect-config>
  <rating-label><![CDATA[Rating]]></rating-label>
  <rating-label-others><![CDATA[Rating]]></rating-label-others>
  <default-rating><![CDATA[unrated]]></default-rating>
  *<unrated-rating><![CDATA[Too New toEvaluate]]></unrated-rating>*
  <hidden-strength-threshold>0.0</hidden-strength-threshold>
  <blind-spot-threshold>0.0</blind-spot-threshold>
  <section-permission type="hidden">
         <role-name>*</role-name>
   <route-step stepid="1"/>
  </section-permission>
  *<required-fields>*
   *<role-name>*</role-name>*
   *<field refid="manual-overall-rating" min-value="-1.0" max-value="-1.0"/>*
   *<route-step stepid="2"/>*
   *<send-action sendid="next_step"/>*
  *</required-fields>*
  <num-decimal-places>2</num-decimal-places>
  <publish-button-label><![CDATA[Publish Content]]></publish-button-label>
 </fm-sect-config>
</summary-sect>
```

Parent topic: Summary-sect [page 275]

Related Information

About the Summary-sect [page 276]
Configuring the Attributes and Elements in the Summary Section [page 278]
XML Example: Customizing Rating Labels [page 281]
XML Example: Specifying the Summary Section Rating Scale [page 282]
XML Example: Configuring Enforce Maximum Overall Score (EMOS, or "Fail one, fail all") [page 284]

13.5.6.6 XML Example: Configuring Enforce Maximum Overall Score (EMOS, or "Fail one, fail all")

Performance Management v12 Acceleration allows an administrator to limit the maximum manual overall score that a rater can grant to a form subject if any item rating in the form is below a certain minimum.

EMOS can be configured both in the form template XML as well as via *Manage Templates* in *Administration Tools*

The XML configuration is added in summary section:

```
<enforce-maximum-overall-score condition='and/or'>
<role-name> */EM/... </role-name>
<max-score> 3.0/4.0/... </max-score>
</enforce-maximum-overall-score>
And in every involved goal/competency section, the element will be added,
<emos-min-score> 3.0/4.0/... </emos-min-score>
```

> **Note**
>
> `<max-score>` saves the maximum manual overall rating;
>
> `<emos-min-score>` saves the minimum item rating of the goal/competency section.

Parent topic: Summary-sect [page 275]

Related Information

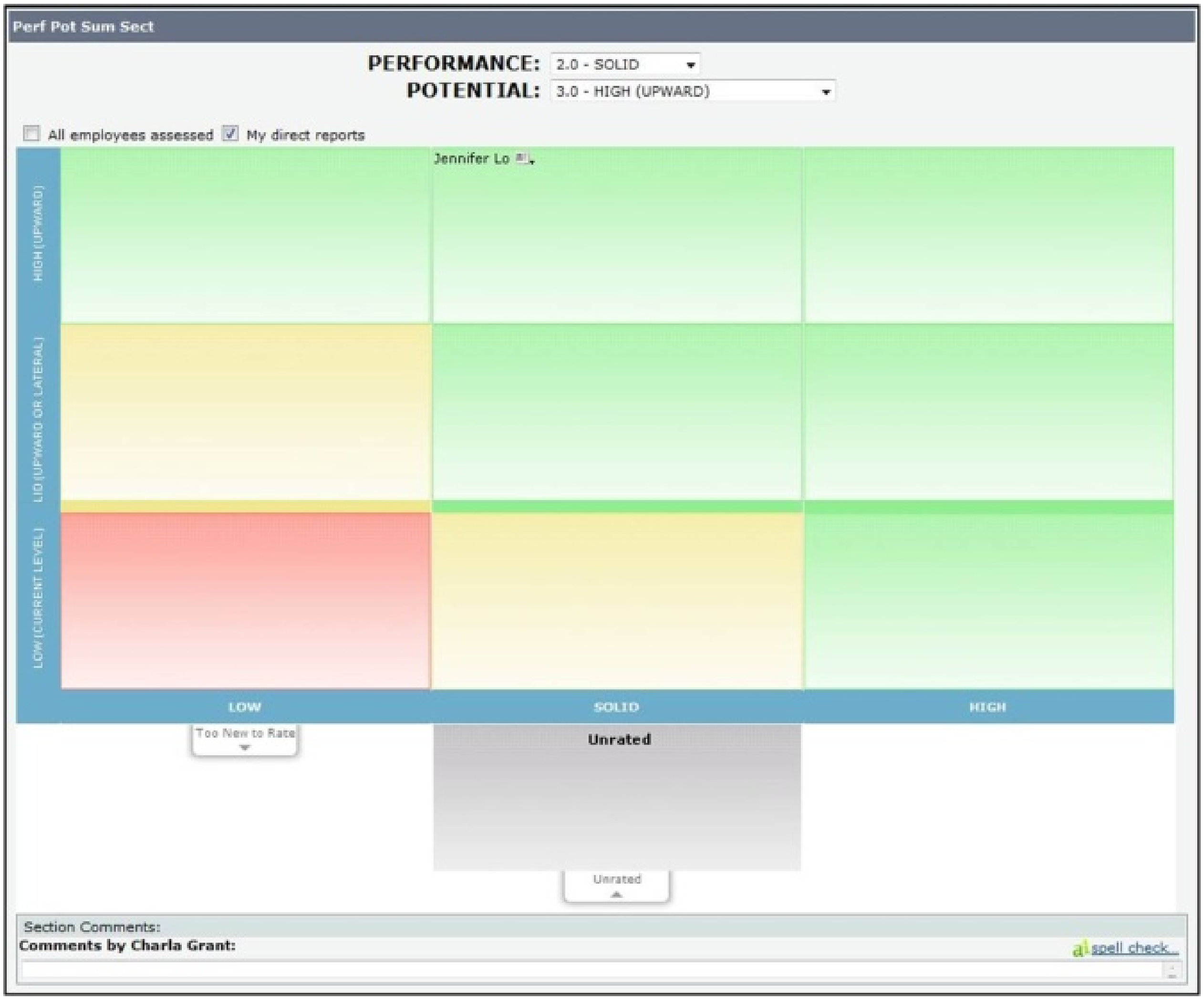
About the Summary-sect [page 276]
Configuring the Attributes and Elements in the Summary Section [page 278]
XML Example: Customizing Rating Labels [page 281]
XML Example: Specifying the Summary Section Rating Scale [page 282]
XML Example: Forced Manual Rating of Overall Performance [page 283]

13.6 Perfpot-summary-sect Overview

The Performance-Potential summary section supports two overall scores: an overall Performance score and an overall Potential score.

These two scores can then be plotted to determine the quadrant in which an employee fall on the performance-potential chart. These two scores are completely independent of each other.

The section currently only supports manual ratings for both Performance and Potential scores. By default, the rating scales used is defined under *Admin Center* > *Matrix Grid Rating Scales*. The matrix grid presented in the section is defined under *Admin Center* > *Matrix Grid Reports: Performance-Potential*.



When do you need a perfpot-summary?

The perfpot-summary-sect is the only way to generate an overall potential score on a form that can be used throughout the system, for example, Succession Data Model or Reporting. Prior to the introduction of this section the only way to include a potential score for an employee was to manually enter or import the score into Live Profile. You need to include this section in a Performance Management form if you want users to be able to enter a potential score from a review form. Performance Management is often followed by a succession implementation. The performance-potential scores and matrix are the same values and grid that can be used in succession nomination. Including the performance-potential summary section in a Performance Management form is a method of collecting employee data for use in the succession nomination process.

Note

Section weights are not displayed beside a section name when a performance potential summary section is configured in the form. This is because the performance rating, that is, the rating of record, is determined by the selection in the matrix section and not the weightings from the individual sections. The rating of record is based on the manual selection of values in the matrix section, and the weightings in the sections are ignored.

13.6.1 Features of the Perfpot-summary Section

These are some features of the perfpot summary

Display Options

Users have the option to include addition employees on the matrix grid report. The two options are:

- All employees assessed – Displays employees on the matrix grid that have a document created from the same form template and the user is a defined role in the route map. This will include documents that have been completed within the last 60 days.

  Note

  The performance potential matrix grid on a Performance Management form will display ALL employees, this includes a form for self (E). If a manager also has a form where they are the subject, they will be able to see in the matrix grid their own form and where they fall on the matrix (based on where their manager put them). To prevent this, you must define matrix grid filter options, described under *Configuration Options for Display Filters* below.

- My direct reports – Displays a user's direct reports on the matrix grid if they have a document created from the same form template and the user is a defined role in the route map. This will include documents that have been completed within the last 60 days. This filter is superseded by the *All employees assessed* filter.

  Note

  Setting of the display filter is *sticky* per users. That means that the user's previous selection will persist the next time he or she accesses any Performance Management form with a performance potential matrix displayed on it.

Filters - Show Form Subject Only

Behavior

- No option to select users on 9-box section
- Show only form subject on 9-box

```
<perfpot-matrix-grid-filter filter-option="form-subject">
 <role-name>EM</role-name>
<route-step stepid="2"/>
</perfpot-matrix-grid-filter >
```

Filters - Follow SM Matrix Grid Permissions

These permissions are designed to support the use case where a single form template is used and a user plays both manager and employee (or reviewer and subject) roles in different forms.

Behavior

- No option to select users on 9-box section
- Show only form subject on 9-box, based on the succession matrix grid permissions

```
<perfpot-matrix-grid-filter filter-option=" sm-matrix-grid-permissions">
<role-name>EM</role-name> <route-step stepid="2"/>
</perfpot-matrix-grid-filter >
```

Drag and Drop Update of Performance and Potential within Performance Management Forms

You can drag employee names from one part of the Performance Management form matrix grid report to another in order change their manual performance and potential scores:

- An employee name displayed on the form matrix grid report can be dragged and placed into a different matrix grid section. This will update the performance and potential scores for the employee.
- When display filters are set to display multiple employees in the matrix grid, the user is able to click on different users and the user is taken to the selected user's form. Changes made on the previous employee's for are auto saved without a prompt.

The drag and drop functionality is currently supported only within the Matrix Grid sections of the forms, and within the Calibration views. It is not supported in the Succession Matrix Grid Reports under the Succession Tab.

13.6.2 DTD, Attributes, and Elements of the Perfpot-summary Section

DTD Definition

```
<perfpot-summary-sect
index="5"
mgt-only="false"
perf-manual-rating="false"
pot-manual-rating="false"
cmt-opt="0"
show-9box="true"
section-display-order="perf-pot">
  <pp-sect-name><![CDATA[perfpotsum]]></pp-sect-name>
  <fm-sect-config>
    <rating-label><![CDATA[Rating]]></rating-label>
    <rating-label-others><![CDATA[Rating]]></rating-label-others>
    <default-rating><![CDATA[unrated]]></default-rating>
    <hidden-strength-threshold>0.0</hidden-strength-threshold>
    <blind-spot-threshold>0.0</blind-spot-threshold>
```

```
    <num-decimal-places>2</num-decimal-places>
    <publish-button-label><![CDATA[Publish Content]]></publish-button-label>
  </fm-sect-config>
</perfpot-summary-sect>
```

```
<!ELEMENT perfpot-summary-sect (pp-sect-name, pp-sect-intro?, fm-sect-config?,
field-permission*, perf-scale?, pot-scale?, manual-performance-rating?,
manual-performance-rating-label?, manual-potential-rating?, manual-potential-rating-
label?,
fm-comment*, sect-level-elements?)>
```

Attributes

Option	Valid values	Description
Index	numeric	The order in which sections are displayed in the form is controlled by section index number starting with `index="0"`. As a result, the form XML can list sections in any order. When you move sections using Provisioning the index number assigned to a section will be updated automatically to reflect how you have re-arranged the sections in the form.
mgt-only	"true" "false"	`true` if only manager/hr can see this section
perf-manual-rating	"true" "false"	`True` to include a manual performance rating in the section
pot-manual-rating	"true" "false"	`True` to include a manual potential rating in the section
cmt-opt	0 , 1	`cmt-opt = 0`: Show section comments. `cmt-opt = 1`: Show no section comments.
show-9box	"true" "false"	True to display the performance-potential matrix grid report in the summary section

Elements

Element	Description
pp-sect-name	The name of the section. See fm-sect-name for details.
pp-sect-intro	Introductory text that appears in the section. See fm-sect-intro for details.
fm-sect-config	Controls the color of the section. See fm-sect-config for details.
field-permission	See field-permission for details.

Element	Description
perf-scale	Define the rating scale to use for the overall performance score. See fm-sect-scale for details.
pot-scale	Define the rating scale to use for the overall potential score. See fm-sect-scale for details
manual-performance-rating	Set the default rating value for the manual performance score. Use the rating value and not the label.
manual-performance-rating-label	Set the label of the manual performance rating field.
manual-potential-rating	Set the default rating value for the manual potential score. Use the rating value and not the label.
manual-potential-rating-label	Set the label of the manual potential rating field.
fm-comment	
sect-level-elements	
sect-level-elements	
filter-option (form-subject | sm-matrix-grid-permissions	The filter is used to determine who should be shown on 9-box based on the filter option at succession module. As a precondition of this setting, enable Succession Management for the user, and grant permission for the user and grant matrix grid report permission. And

13.6.3 Example: A perfpot-summary section

This is an example of a perfpot-summary section

```
<perfpot-summary-sect index="3" mgt-only="false" perf-manual-rating="true" pot-
manual-rating="true" cmt-opt="0" show-9box="true">
<pp-sect-name><![CDATA[Perf Pot Sum Sect]]>
</pp-sect-name>
<fm-sect-config>
<rating-label>
<![CDATA[Rating]]></rating-label>
<rating-label-others><![CDATA[Rating]]></rating-label-others>
 <default-rating><![CDATA[unrated]]></default-rating>
<unrated-rating><![CDATA[Too New To Rate]]></unrated-rating>
<hidden-strength-threshold>0.0</hidden-strength-threshold>
<blind-spot-threshold>0.0</blind-spot-threshold>
<num-decimal-places>2</num-decimal-places>
<publish-button-label><![CDATA[Publish Content]]></publish-button-label> </fm-sect-
config>
 </perfpot-summary-sect>
```

13.6.3.1 Example: A Perfpot-summary Section with Form-Subject Filter Option

This is an example of a perfpot-summary section with form-subject filter option

```
<?xml version="1.0" encoding="UTF-8"?>
<!DOCTYPE perfpot-summary-sect SYSTEM "sf-form.dtd">
<perfpot-summary-sect index="2" mgt-only="false" perf-manual-rating="true" pot-
manual-rating="true" cmt-opt="1" show-9box="true" section-display-order="perf-pot">
  <pp-sect-name><![CDATA[Ratings]]></pp-sect-name>
  <fm-sect-config>
    <rating-label><![CDATA[Rating]]></rating-label>
    <rating-label-others><![CDATA[Rating]]></rating-label-others>
    <default-rating><![CDATA[To Be Rated]]></default-rating>
    <unrated-rating><![CDATA[Too New to Rate]]></unrated-rating>
    <hidden-strength-threshold>0.0</hidden-strength-threshold>
    <blind-spot-threshold>0.0</blind-spot-threshold>
    <section-permission type="enabled">
      <role-name>*</role-name>
      <route-step stepid="*"/>
    </section-permission>
    <num-decimal-places>2</num-decimal-places>
    <publish-button-label><![CDATA[Publish Content]]></publish-button-label>
  </fm-sect-config>
  <perfpot-matrix-grid-filter filter-option="form-subject">
    <role-name>EM</role-name>
    <route-step stepid="*"/>
  </perfpot-matrix-grid-filter>
</perfpot-summary-sect>
```

13.6.3.2 Example: A Perfpot-summary Section with sm-matrix-grid-permissions Filter Option

This is an example of a perfpot-summary section with an sm-matrix-grid-permissions filter option.

```
<?xml version="1.0" encoding="UTF-8"?>
<\!DOCTYPE perfpot-summary-sect SYSTEM "sf-form.dtd">
<perfpot-summary-sect index="2" mgt-only="false" perf-manual-rating="true" pot-
manual-rating="true" cmt-opt="1" show-9box="true" section-display-order="perf-pot">
<pp-sect-name><\!\[CDATA[Ratings]\]></pp-sect-name>
<fm-sect-config>
<rating-label><\!\[CDATA[Rating]\]></rating-label>
<rating-label-others><\!\[CDATA[Rating]\]></rating-label-others>
<default-rating><\!\[CDATA[To Be Rated]\]></default-rating>
<unrated-rating><\!\[CDATA[Too New to Rate]\]></unrated-rating>
<hidden-strength-threshold>0.0</hidden-strength-threshold>
<blind-spot-threshold>0.0</blind-spot-threshold>
<section-permission type="enabled">
<role-name>*</role-name>
<route-step stepid="*"/>
</section-permission>
<num-decimal-places>2</num-decimal-places>
<publish-button-label><\!\[CDATA[Publish Content]\]></publish-button-label>
</fm-sect-config>
<perfpot-matrix-grid-filter filter-option="sm-matrix-grid-permissions">
<role-name>EM</role-name>
<route-step stepid="*"/>
</perfpot-matrix-grid-filter>
</perfpot-summary-sect>
```

13.6.3.3 Important Notes on Perfpot-summary

The performance-potential summary section is dynamically updated when either the matrix rating scale or the report is changed by the Admin. These are not locked into the configuration at the time the document is created.

> **Note**
>
> Except the completed forms all other forms get affected whenever the matrix rating scale is changed by the admin.

> **Note**
>
> If you want to use the *Too New to Rate* feature, you need to select *Enable New Matrix Grid Report* in the *Company Settings* in Provisioning.

When a form is configured with both a perfpot-summary-sect and a summary-sect

If both sections have...	Then...
Overall performance scores	The perfpot-summary-sect overall performance score is used as the rating of record for the form.

If both perfpot-summary-sect and a summary-sect is configured then only section comments are stored in the summary section of the Ad Hoc reports.

If Perf-pot Summary section is not configured, both overall rating and section comments are stored in the summary section of the Ad Hoc reports.

•

13.7 Custom-sect

A custom section can be used in a form to display or capture information that is not objective or competency based. You can have as many custom sections that you need within the same form. Custom fields do not support HTML with Performance Management v12 Acceleration.

Requirements

- Fields contained within a custom section consists of "custom fields" that are rendered "top-down" in a single column. The fields can be pre-populated with defaults that are editable to form reviewers. Custom fields are defined using fm-element.

- Note

  If you use a checkbox type you must specify the value such as True, Y, or Yes. This is the value that is stored when user checks the box. If you do not specify a value, then no value is stored in the database.

Field permission for custom fields:

```
<field-permission type="read"> <role-name>
*</role-name>
 <ekey>Cust_100_01</ekey>
 <ekey>Cust_100_02</ekey>
<route-step stepid="M20"/> <route-step stepid="M30"/>
 <route-step stepid="M40"/>
 </field-permission>
```

Making a custom field required

```
<required-fields>
     <role-name>E</role-name>
     <required-fields>
     <field refid="custom-element" min-value="1.0" max-value="-1.0">
      <ekey>ConfirmGoals_Date</ekey>
            </field>
      <route-step stepid="M20"/>
      <send-action sendid="inner_step_send"/>
          </required-fields>
```

XML Example: Creating Progress Text Box for Mid-Year Updates for a Goal

```
\\
  </fm-sect-scale>
  <obj-sect-type><![CDATA[]]></obj-sect-type>
    <obj-sect-plan-id>2</obj-sect-plan-id>
    *<sect-fm-elements>*
      *<fm-element index= "0" type= "4">*
     *<ekey><![CDATA[MidObj]]></ekey>*
     *<ename><![CDATA[Mid-year review of progress (January):]]></ename>*
     *<evalue><![CDATA[]]></evalue>*
    *</fm-element>*
    *</sect-fm-elements>*
    <meta-grp-label><![CDATA[Group]]></meta-grp-label>
  </objective-sect>
{anchor:_Toc152754808}{anchor:_Toc152792692}{anchor:_Toc155088044}
{anchor:_Toc155157175}\\
```

XML Example: Custom Section with Custom Fields

```
\\
<fm-sect index="8" mgt-only= " false " split-cmt= " false " cmt-opt= "1">
   <fm-sect-name><![CDATA[Additional Comments]]></fm-sect-name>
   <fm-sect-intro><![CDATA[Please use the spaces below to document areas of
strength and areas  for improvement.]]></fm-sect-intro>
   <fm-sect-config>
      <rating-label><![CDATA[Rating]]></rating-label>
      <rating-label-others><![CDATA[Rating]]></rating-label-others>
      < default-rating><![CDATA[unrated]]></ default-rating>
      <hidden-strength-threshold>0.0</hidden-strength-threshold>
      <blind-spot-threshold>0.0</blind-spot-threshold>
   </fm-sect-config>
  <fm-element index= "0" type= "9">
      <ekey><![CDATA[EmpMgrMeetingCheckBox]]></ekey>
      <ename><![CDATA[<b>Check here to indicate that the Employee Dialog Meeting
has occurred</b>]]></ename>
     <evalue><![CDATA[Y]]></evalue>
   </fm-element>
  <fm-element index= "1" type= "3">
      <ekey><![CDATA[Date]]></ekey>
      <ename><![CDATA[Dialog Meeting Date(dd/mm/yyyy):]]></ename>
     <evalue><![CDATA[]]></evalue>
   </fm-element>
  <fm-element index= "2" type= "4">
     <ekey><![CDATA[SumStrength]]></ekey>
  <ename><![CDATA[Summary of employee's strengths:]]></ename>
  <evalue><![CDATA[]]></evalue>
   </fm-element>
   <fm-element index= "3" type= "4">
  <ekey><![CDATA[SumImprove]]></ekey>
   <ename><![CDATA[Areas where the employee could improve present performance:]]></
ename>
   <evalue><![CDATA[]]></evalue>
   </fm-element>
   <fm-element index= "4" type= "6">
  <ekey><![CDATA[SumCareerObj]]></ekey>
  <ename><![CDATA[Employee's job satisfaction:]]></ename>
   <evalue><![CDATA[]]></evalue>
   <elist elist-value-type= "7" elist- default-name= "None Selected" elist- default-
value="">
    <elist-element elist-index= "0" elist-selected= " false ">
     <elist-name><![CDATA[Satisfied with current position]]></elist-name>
     <elist-value><![CDATA[Satisfied]]></elist-value>
         </elist-element>
         <elist-element elist-index= "1" elist-selected= " false ">
     <elist-name><![CDATA[Interested in  future opportunities]]></elist-name>
    <elist-value><![CDATA[Disatisfied]]></elist-value>
        </elist-element>
     </elist>
   </fm-element></fm-sect>
\\
```

XML Example: Displaying Standard Elements in Custom or Summary Sections

You can display standard employee data elements in a custom section using the ekey element type. It may be possible to do the same in an **objective** or **competency** section, but the problem is you need to disable the section because it gives the appearance that you can change the values...which you can do in the form, but when you close it and reopen it, it will draw the information from the database...not what was saved in the browser by the user.

```
\\
<?xml version="1.0" encoding= "UTF-8"?>
<!DOCTYPE fm-sect SYSTEM "sf-form.dtd">
<fm-sect index="9" mgt-only= " false " split-cmt= " false " cmt-opt= "1">
  <fm-sect-name><![CDATA[]]></fm-sect-name>
 <fm-sect-config>
  <section-color><![CDATA[white]]></section-color>
  <rating-label><![CDATA[Rating]]></rating-label>
  <rating-label-others><![CDATA[Rating]]></rating-label-others>
  < default-rating><![CDATA[unrated]]></ default-rating>
  <hidden-strength-threshold>0.0</hidden-strength-threshold>
  <blind-spot-threshold>0.0</blind-spot-threshold>
  <num-decimal-places>2</num-decimal-places>
  <publish-button-label><![CDATA[Publish Content]]></publish-button-label>
 </fm-sect-config>
 *<fm-element index="0" type= "3">*
  *<ekey><![CDATA[CUSTOM01]]></ekey>*
  *<ename><![CDATA[Date Completed:]]></ename>*
  *<evalue><![CDATA[]]></evalue>*
 *</fm-element>
*</fm-sect>
```

13.8 Signature-sect

The Signature Section lists who must sign the form; each signer has a separate signature line that is based on the route map. The signature dates appears next to names of people who "signed" by clicking the *Send* button in the toolbar when the form is in the Signature stage.

Remember

As a customer, you do not have access to Provisioning. To complete tasks in Provisioning, contact SAP Cloud Support.

Important

- Even though the signature section is a regular fm-sect, you can only specify signature section name and introduction text. The rest of the elements within this section will be ignored.
- The optional end-of-section comments, only editable during the Signature stage. (cmt-opt= where 0 = show section comments; 1 = no section comments)

DTD Definition

```
<!ELEMENT signature-sect (fm-sect+)>
```

XML Example

```
<fm-sect index="8" mgt-only= " false " split-cmt= " false " *cmt-opt= "0"*>
    *<fm-sect-name><![CDATA[Signatures]]></fm-sect-name>*
```

```
    *<fm-sect-intro><![CDATA[Your electronic signature will be stored in  this
section of the form.*
*[[BREAK]][[BREAK]]*
*Signatures indicate that the Performance Assessment discussion has been
held.**]]></fm-sect-intro>*
    <fm-sect-config>
  <rating-label><![CDATA[Rating]]></rating-label>
      <rating-label-others><![CDATA[Rating]]></rating-label-others>
      < default-rating><![CDATA[unrated]]></ default-rating>
      <hidden-strength-threshold>0.0</hidden-strength-threshold>
      <blind-spot-threshold>0.0</blind-spot-threshold>
      <num-decimal-places>2</num-decimal-places>
      <publish-button-label><![CDATA[Publish Content]]></publish-button-label>
    </fm-sect-config>
</fm-sect>
//
```

Options for Signature Line Display of Skipped Steps

It is possible to set the form to show an empty signature line with data below the line in the case of a skipped signature step. The option is found in Form Template Settings:

When this option is selected and a signature step is skipped, the signature section will appear as: *Name1* skipped by *Name2*.

13.9 Configuring Performance Review Form for Compensation Section

The Performance Review form can have the Compensation section, which shows Compensation related information and has a link to the Compensation form. You need to configure the Performance Review form template to include the Compensation section.

Prerequisites

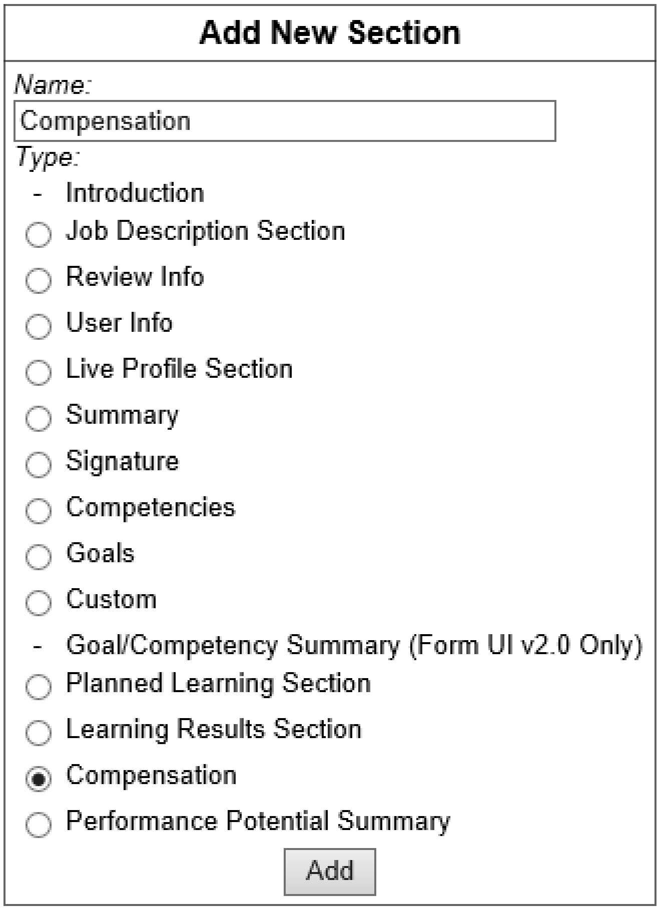
- Performance Management v12 Acceleration
- License for Compensation

Procedure

1. Upload Compensation form template: *Admin Center* > *Form Template Settings* > *Upload New Form*, click *Choose File*, select the file and select *Upload Form Template*.
2. Go to *Provisioning* > *Form Template Administration*, and copy the ID of newly uploaded Compensation form template which will be linked from the Performance Review form template.

> **Remember**
>
> As a customer, you do not have access to Provisioning. To complete tasks in Provisioning, contact SAP Cloud Support.

3. On the *All Form Templates* page, open the Performance Review form template, you want to configure.
4. Under *Add New Section*, add a relevant *Name* for the section, select *Compensation*, and click *Add*.



5. Scroll down to *Edit Sections*, and go to the newly added Compesation section. Enter the XML code as shown below, fill in values for compensation-template-id (the form template ID you copied) and compensation-field (match Compensation form template), and click *Save Form*.

```
<?xml version="1.0" encoding="UTF-8"?>
<!DOCTYPE compensation-sect SYSTEM "sf-form.dtd">
<compensation-sect index="0">
  <compensation-sect-name><![CDATA[Compensation]]>
</compensation-sect-name>
  <compensation-sect-intro><![CDATA[Compensation
description]]></compensation-sect-intro>
    <fm-sect-config>
    <rating-label><![CDATA[Rating]]></rating-label>
    <rating-label-others><![CDATA[Rating]]></rating-label-
others>
    <default-rating><![CDATA[unrated]]></default-rating>
    <hidden-strength-threshold>0.0</hidden-strength-
threshold>
    <blind-spot-threshold>0.0</blind-spot-threshold>
    <num-decimal-places>2</num-decimal-places>
    <publish-button-label><![CDATA[Publish Content]]>
</publish-button-label>
  </fm-sect-config>
  <compensation-template-id><![CDATA[708]]></compensation-
template-id>
  <compensation-field id="pmRating" show-if-value-
empty="true"></compensation-field>
  <compensation-field id="merit" show-if-value-empty="true">
</compensation-field>
  <compensation-field id="lumpSum" show-if-value-
empty="true"></compensation-field>
</compensation-sect>
```

6. Go to *Admin Center* > *Performance* > *Create New Form*, and select the Performance Review template you've configured in *Provisioning*, select the target audience and create the form.

   > Note
   >
   > You must have the necessary permissions for creating a Compensation form.

Results

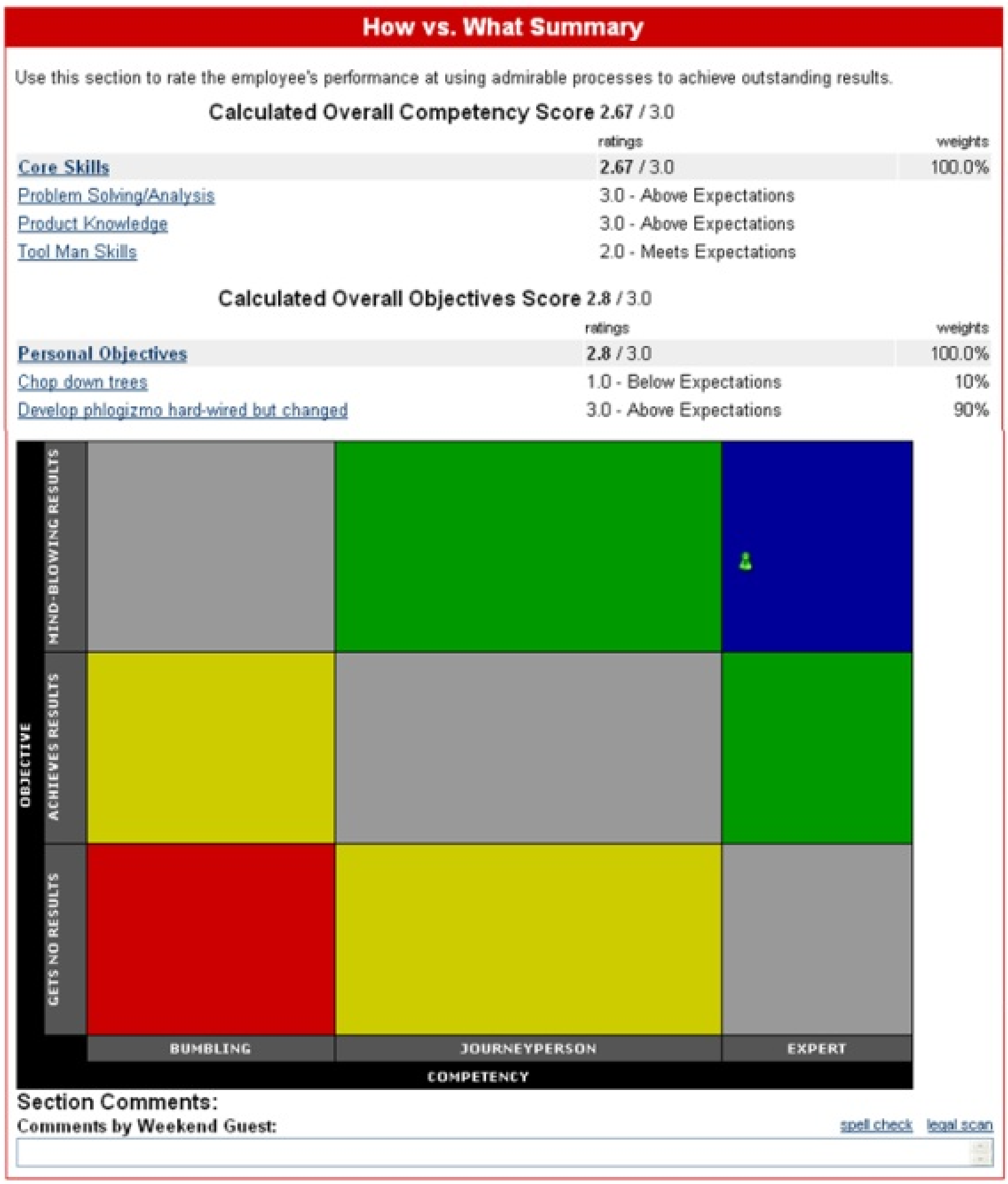
The Performance Review form you create will have a Compensation section. A new Compensation form will also be created, as the Performance Review form has a Compensation section.

13.10 Obj-comp-sect Overview

The Obj-Comp section calculates two scores: an Objectives score and a Competencies score.

These two scores are then plotted to determine the quadrant in which an employee fall on the obj-comp chart. These two scores are completely independent of each other The objective score is an aggregate of the ratings from all the objective sections in the PM form.; and the competency score is an aggregate of the ratings from all the competency sections in the Performance Management form. Each aggregated score is a weighted average of section ratings where:

- The section rating scale is mapped onto the matrix grid rating scale; and
- The weight is normalized to be additive to a final sum of 1 (or 100%) across all goal (or competency) sections.



13.10.1 When Do You Need an Objcomp-summary Section?

The objcomp-summary section generates an overall competency score and an overall goal score.

These scores are used in several of the dashboard portlets. You need to include this section in a Performance Management form if you want to report these scores. If you do not calculate these scores the dashboard portlets that report these scores will contain no data.

- Competency/Goal Matrix
- Average competency rating
- Average competency rating distribution
- Average goal rating •Average goal rating distribution
- Average goal/competency rating
- Average overall goal/competency rating distribution
- Obj-comp matrix (see below)
- Overall Competency and Overall Goal score sections of Live Profile (if included)

Performance Management is often followed by a succession implementation, and even if the client does not have SP on his implementation road map there is a good chance it will be added. We recommend that you plan for SP implementation before the Performance Management review form is put into circulation.

- SP implementations require the Obj-Comp section as it is the data source for the how vs. what matrix AND for the overall goal and overall competency trend sections of Live Profile.
- Trend sections include overall performance scores, overall goal and competency scores and potential ratings.
- Trend data is useful for managers to see how an employee has performed from year to year across these four measures of performance to determine performance consistency and predicted performance trajectory.
- At first some clients do not ask for this data to be displayed in Live Profile, but WHEN they change their minds and do want it displayed, the Obj Comp section in the review form ensures that the overall goal and overall competency ratings are available for this later use.
- In rolling out PM consider rating scales and roll-up implications for the matrix (grid) reports once SP is rolled out.
- Encourage use of the same point (3, 4, 5) rating scales for consistency in matrix results, for example, if you want a 5 x 5 make sure client uses 5 point competency and 5 point goal rating scales.

13.10.1.1 Obj-com Portlet

The obj-comp portlet is a dashboard report that shows where people fall on the scales for *How vs.What*. This report also is available in Live Profile.

To include this portlet, the Performance Management forms must have an obj-comp section where these values are calculated. In the vast majority of cases the obj-comp section on the PM form is hidden from users. This hides the results on the PM form while still allowing the obj-comp values to be calculated.

> **Note**
>
> Make sure that you select Include In-Progress Documents and enable Include Process Filter.

13.10.1.2 Requirements

To calculate the obj-comp values, you must specify how the objective and competency scores should be weighted

- In each Objective section that you want to factor into the obj-comp result, set the `<sect-weight-4-objcomp-summary>` value. The number you choose allows you to apply a relative weighting for that objective section relative to other objective sections in the Performance Management form. For example if you have two objective sections and you want them equally weighted you would assign the same number to both sections. Alternatively, if one section was to be weighted more heavily, you could assign relative weightings to each section.

- In each Competency section that you want to factor in to the obj-comp result set the set the `<sect-weight-4-objcomp-summary>` value. The number you choose allows you to apply a relative weighting for that competency section relative to other competency sections in the Performance Management form.
- Section summaries are optional. Specific sections such as Core Skills and Personal Objectives appear in the objcomp-summary section only if their `in-objcmp-summ-display` is set to true
- 9-Box display is optional; colors and labels are configurable
- Section Comments is optional
- Managers can override overall scores for competencies or goals and have this result in adjusted overall performance rating
- Overall performance rating can be generated from 'mapped scores' from overall goal and overall competency scores for example, if an employee receives a 1 out of 5 for either overall goal OR overall competency score, the overall performance rating is a 1, even if the employee scored 5 on the other dimension. This uses the OCOC (Overall Calculated Objective Competency) feature.
- The Succession How vs. What matrix grid report must be configured to use sysOverallCompetency and sysOverallObjective ratings (not a custom rating trend element on either axis).

Examples of how you might set the values for `<sect-weight-4-objcomp-summary>` are shown below.

PM Section	sect-weight-4-objcom-summary	Score	Obj-comp score
Corporate Competency	1	4.0	4
Job Related Competency	2	3.5	
2006 Objectives Job related competencies are weighted 2x the corporate competency	1	5.0	5

PM Section	sect-weight-4-objcom-summary	Score	Obj-comp score
Corporate Competency	50	4.0	3.5
Job Related Competency	50	3.0	
2006 Objectives	100	4.5	3.0
Development Objectives	0	3.0	
Corporate and Job related competencies are equally weighted. The development objectives are omitted from the objective score.			

13.10.1.3 The Overall Calculated Objective Competency (OCOC) Rating

The Overall Calculated Objective competency (OCOC) rating calculates an overall competency rating.

The summary-sect must not be included.

If	then
The form includes both the objcomp-summary-sect and the summary-sect	the summary-sect always takes precedence
The form includes the objcomp-summary-sect but not the overall summary section	the OCOC score takes precedence.
Weights and ratings are not selected.	OCOC rating will appear as *unrated*
A rating for overall competency and overall objective score is not selected	The default manual rating is set to *unrated* until the user sets a score, when the manual rating takes precedence over the calculated score.

13.10.1.4 Printing a Form

Typically, an objcomp section is hidden for users except at the Completed step.

If you plan to print a form, the objcomp section will be printed unless you de-select that option in the *Print Setup* screen.

13.10.2 How to Create Objcomp Trend Data When There isn't an Objcomp-summary Section

This is what you need to do if the Obj-Comp section wasn't included in the Performance Management Review Form and the client now wants to generate a *How vs. What* matrix report from that review period and/or to populate overall goal or overall competency scores in the respective Live Profile sections.

- You assemble a reporting guide for client on how to run a Detailed Doc Search report that pulls the overall goal and competency scores from the form into a csv report. You do this by selecting all *Document Content Fields* in the *Export Options*
- The client's data analyst assembles a *Trend Import File*, commonly used with SP implementations, that populates the overall goal and overall competency fields with the data from the above report and ensures that dates are accurate.
- The client imports the *Trend Import File*, which brings in the appropriate data for these requirements.

> **Note**
>
> The LP and matrix grids must have been configured accordingly.

13.10.3 Elements

The following elements apply to the objcomp section:

Element	Description
oc-sect-name	The name of the section. See fm-sect-name for details.
oc-sect-intro	Introductory text that appears in the section. See fm-sect-intro for details.
fm-sect-config	Controls the color of the section. See fm-sect-config for details.
field-permission	See field-permission for details.
matrix-grid-id	Must be "howvswhat_matrix_grid_report"
comp-scale	This show-value will be used to set the show-value attribute in the fm-sect-scale.
obj-scale	This show-value will be used to set the show-value attribute in the fm-sect-scale.
scale-adjusted-matrix grid-bg-color	
x-axis-label	must be either *competency* or *objective*
y-axis-label	must be either "competency" or "objective"
comp-summary-rating	
comp-cal-summary-rating	
comp-summary-rating-label	labels are configurable
comp-cal-summary-rating-label	labels are configurable
obj-summary-rating	
obj-cal-summary-rating	
obj-summary-rating-label	labels are configurable
obj-cal-summary-rating-label	labels are configurable
ococ-rating-label	configurable (with colon) `<ococ-rating-label><![CDATA[Overall Rating:]]></ococ-rating-label>`
overall-rating-display-order="calc-manual"	Not working in OCOC summary section **Note** When you set `overall-rating-display-order="calc-manual"`, create and open a Performance form. Go to OCOC summary section, and check the order of manual and calculated rating for each section. The rating order should be calculated-manual (`calc-manual`) and not (`manual-calc`). Currently, the rating order is manual-calculated.

Element	Description
Adjusted Competency Rating	Not supported in PM v12A
Adjusted Objective Rating	Not supported in PM v12A

13.10.4 Attributes in the objcomp Section

The following attibutes apply to the objcomp section

Option	Valid Values	Description
Index	numeric	The order in which sections are displayed in the form is controlled by section index number starting with `index="0"`. As a result, the form XML can list sections in any order. When you move sections using Provisioning the index number assigned to a section is updated automatically to reflect how you have re-arranged the sections in the form.
mgt-only		true if only manager/hr can see this section;
comp-manual-rating		Overall competency rating can be edited. Edits are not reflected in the Overall Performance Rating of the form. When set to false, the overall competency rating is the calculated form rating.
obj-manual-rating		Overall objective rating can be edited edits are not reflected in the Overall Performance Rating of the form. When set to false, the overall objective rating is the calculated form rating.
comp-cal-rating		`true`: the overall objective rating is calculated `false`: the overall objective rating is not calculated
obj-cal-rating		
split-cmt		`true` if displaying subject and manager's comments side by side
rating-opt		0: default, no ratings next to each user's comment
cmt-opt		0: Show section comments; default 1: No section comments;
show-listing		both options show listing.
rating-mode		all options display rating in text.
show-9box		

13.10.5 Example: a Hidden objcomp-summary Section

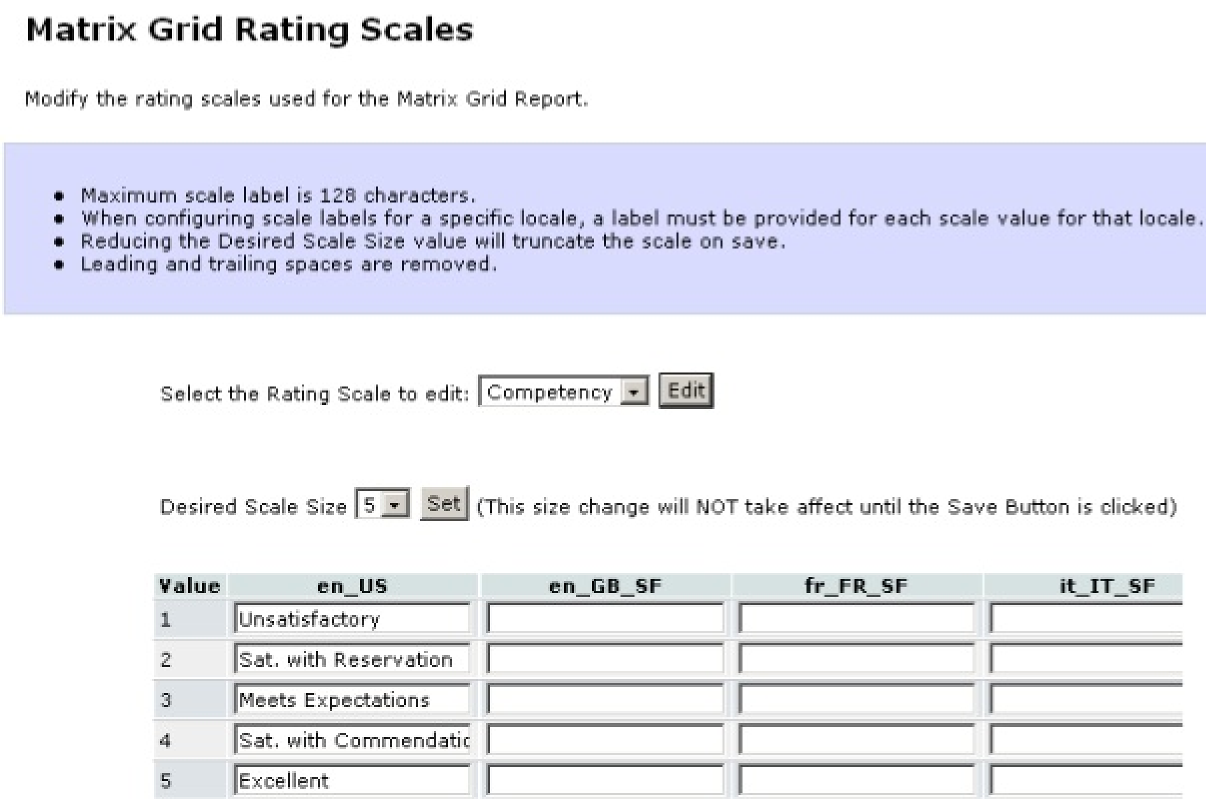
This is an example of a hidden objcomp-summary section:

```
<objcomp-summary-sect index="6" mgt-only="false" comp-manual-rating="false" obj-
manual-rating="false" comp-cal-rating="true"
obj-cal-rating="true" split-cmt="false" rating-opt="0" cmt-opt="0" show-
listing="false" rating-mode="text"
show-9box="false">
<oc-sect-name><![CDATA[OBJ/COMP Summary Section]]></oc-sect-name>
<oc-sect-intro>
<![CDATA[This section is hidden by default. Additional attributes of this section:
[[LIST| Manual rating always take precedence over calculated ratings even if manual
rating is left unrated|
<b>comp-manual-rating="false"</b>
 Leave this falseif section is hidden |<b>obj-manual-rating="false" </b>Leave
thisfalseif section is hidden|<b> show-9box="false" </b>
 this will display a rather large 9 Box on the form with a big blue dot where the
subject lands]] ]]>
</oc-sect-intro>
<fm-sect-config>
<rating-label><![CDATA[Rating]]></rating-label>
 <rating-label-others><![CDATA[Rating]]></rating-label-others>
     <default-rating><![CDATA[unrated]]></default-rating>
     <hidden-strength-threshold>0.0</hidden-strength-threshold>
    <blind-spot-threshold>0.0</blind-spot-threshold>
    *<section-permission type="hidden">* *<role-name>*</role-name>* *</section-
permission>* <num-decimal-places>2</num-decimal-places>
    <publish-button-label><![CDATA[Publish Content]]></publish-button-label>
 </fm-sect-config>
<matrix-grid-id><![CDATA[howvswhat_matrix_grid_report]]></matrix-grid-id>
<x-axis>competency</x-axis>
<y-axis>objective</y-axis>
</objcomp-summary-sect>
```

13.10.5.1 Configuring Matrix Grid Rating Scales

The matrix grid grating scales can be configured.

1. From the *Admin Tools* scroll to *System Properties*.
2. Select *Rating Matrix Grid Rating Scales*.
3. Select the scale you want to edit, then click *Edit*.
4. Make the necessary changes.



13.11 Fm-sect Section Level Definitions

This element is used to define properties of the form section including the name, introductory text, and so on.

Remember

As a customer, you do not have access to Provisioning. To complete tasks in Provisioning, contact SAP Cloud Support.

DTD Definition

```
<!ELEMENT fm-sect (fm-sect-name,fm-sect-intro?, fm-sect-config?, fm-element*, fm-
comment*, fm-add-element?)>
 <!ATTLIST fm-sect
 index CDATA #REQUIRED mgt-only (true | false) "false"
 ask-4-comment (true | false) "false"
 split-cmt (true | false) "false"
 cmt-opt (0 | 1) "0"
 >
```

Attributes

Option	Valid values	Description
Index	numeric	The order in which sections are displayed in the form is controlled by section index number starting with `index="0"`. As a result, the form XML can list sections in any order. When you move sections using Provisioning the index number assigned to a section will be updated automatically to reflect how you have re-arranged the sections in the form.
mgt-only		True if only manager/hr can see this section; This attribute is required but may be ignored in some section.
ask-4-comment		obsolete
split-cmt		Always true in Performance Management v12 Acceleration. Subject and manager's comments are displayed side-by-side Set `rating-opt = 3`
cmt-opt		`cmt-opt=0`: Both item and section comments are displayed. `cmt-opt=1`: Only section comments are displayed, item comments are not displayed. `cmt-opt=2`: Only item comments are displayed, section comments are not displayed. `cmt-opt=3` Both item comments and section comments are not displayed.

13.11.1 Elements

These are the elements used with the fm-sect:

fm-sect-name	This allows you to specify the section names in a PM review form. The name may vary by section. Simply enter the name of the section within the `<![CDATA[*Section Name*]]> syntax found within the XML tags.`
	`<fm-sect-name><![CDATA[User Info Section Name]]></fm-sect-name>`
	`<reviewinfo-sect-name><![CDATA[Review Info Section Name]]></`
	`reviewinfo-sect-name`

fm-sect-name	`<fm-sect-name><![CDATA[Introduction Section Name]]></fm-sect-name>`
	`<obj-sect-name><![CDATA[Objective Section Name]]></obj-sect-name>`
	`<comp-sect-name><![CDATA[Competency Section Name]]></comp-sect-name>`
	`<fm-sect-name><![CDATA[Custom Section Name]]></fm-sect-name>`
	`<summary-sect-name><![CDATA[Summary Section Name]]></summary-sect-`
	`name>`
	`<fm-sect-name><![CDATA[Signature Section Name]]></fm-sect-name>`

fm-sect-intro	See fm-sect-intro section for details.
fm-sect-config	See fm-sect-config section for details.
fm-element	See fm-element section for details.
fm-comment	
fm-add-element	

13.11.2 XML Example

```
<fm-sect index="8" mgt-only= " false " split-cmt= " false " *cmt-opt= "0"*>
    *<fm-sect-name><![CDATA[Signatures]]></fm-sect-name>*
    *<fm-sect-intro><![CDATA[Your electronic signature will be stored in
  this section of the form.*
*[[BREAK]][[BREAK]]*
*Signatures indicate that the Performance Assessment discussion has been
held.*
*]]></fm-sect-intro>*
    <fm-sect-config>
  <rating-label><![CDATA[Rating]]></rating-label>
      <rating-label-others><![CDATA[Rating]]></rating-label-others>
      < default-rating><![CDATA[unrated]]></ default-rating>
      <hidden-strength-threshold>0.0</hidden-strength-threshold>
      <blind-spot-threshold>0.0</blind-spot-threshold>
      <num-decimal-places>2</num-decimal-places>
      <publish-button-label><![CDATA[Publish Content]]></publish-button-label>
    </fm-sect-config>
</fm-sect>
 //
```

13.12 fm-sect-config (Additional Form Section Config Options)

This element contains configurable options for any form sections.

> **Remember**
>
> As a customer, you do not have access to Provisioning. To complete tasks in Provisioning, contact SAP Cloud Support.

DTD Definition

```
<!ELEMENT fm-sect-config
        (section-color?, rating-label?, rating-label-others?, default-rating?,
unrated-rating?,
        weight-total?, hidden-strength-threshold?, blind-spot-threshold?, rating-
bar-color?,
        item-weights?, hide-weight-percent-sign?, weight-label?, show-points?,
        section-comments-label?, section-comments-blank-indicator?, section-manager-
comments-label?,
        section-subject-comments-label?,comments-blank-indicator?, manager-comments-
label?,
        subject-comments-label?, calculated-rating-label?, rating-display-format?,
        section-permission*, section-owner*, required-fields*, calibration-mode?,
show-job-roles?,
        default-section-comments-label?, default-item-comments-label?, weight-total-
option?,
        num-decimal-places?, publish-button-label?, publish-button-warning?, field-
publishing*,
        section-rating-calc?, section-item-rating-calc?)>
```

Elements (partial list)

> **Note**
>
> By default, the color of the section name bar is blue but you can change the color by adding/editing this element. The name of the color or the hexa-decimal representation of the number can be used. We recommend using this feature only when the customer has specifically requesed it. The application comes with its own skin colors, and maintaining consistency throughout the application will usually provide a better user experience.

Field	Description
rating-label	Label that appears next to the scale of the ratings that are used in the calculated score. The default value is "Rating". This corresponds to the "official" rating only, i.e. item-rating. For more details refer, Rating Options [page 156]
rating-label-others	Label that appears next to employees scale or the rating not included in the calculation.

Field	Description
	The Others' Ratings tab displays all ratings other than those of the employee (form subject) and the logged-in user. The default value is "Rating". This corresponds to all the "non-official" ratings, i.e. subject-item-rating & item-cmt-rating. For more details refer, Rating Options [page 156]
default-rating	The rating value when no value is selected.
unrated-rating	The rating value that can be selected by the user. This value is not included in the calculation.
weight-total	The weight total for the section; negative number or null means ignore the validation of total weights. A warning or error message may be displayed depending on the weight-total-option attribute. This option is relevant only if the weight-total is also specified. This is an enforcement option for item weight totals. Valid values: • "enforce" - error message is displayed • "warn" - default value - warning message is displayed if the weight fo all intems does not agree with the weight total.

Item-weights	Allow you to set the range of weights for an item. Floor and ceiling parameters are displayed on the form.
	
	`<Item-weights>`
	`        <item-weight-floor>10</item-weight-floor>`
	`        <item-weight-ceiling>40</item-weight-fceiling>`
	`</Item-weights>`
	
	If the parameters are not met when the form is sent, a warning message is displayed.

hide-weight-percent-sign	Hides the % sign next to the weight for items in this section. Can be applied to: a competency section, an objective section, a summary section, an objcomp-summary-sect
section-owner	For example, if you want only EM to see and publish a section in a collaborative routing step, then do this: required-fields: see permissions

13.12.1 Example: Using Default and Unrated-Rating Values

This topic explains how you can allow users to select a rating of **Too new to rate** that does **not** affect averages in reporting and dashboards?

Use the `<unrated-rating>` tag, similar to the `<default-rating>` tag. This option allows a response that would be recognized (for the purpose of filling the need for a required rating) but **not** count as a rating with a numeric value (so it would not affect the scoring and averages). So you'd have both a "default-rating" (such as "Unrated" or "Select one...") and an "unrated-rating" response choice (such as "Too new to rate").

The optional unrated rating label added to the rating scale. This optional rating is treated as unrated like the `<default-rating>` in terms of rating value.

Example

```
<default-rating>Choose One</default-rating>
```

```
<unrated-rating>Not Observed</unrated-rating>
```

Given a scale like this:

- 1.0 Does Not Meet
- 2.0 Meets
- 3.0 Exceeds

The following rating scale is displayed on the form:

```
Choose One

Not Observed

1.0 Does Not Meet

2.0 Meets

3.0 Exceeds
```

If show-value is set to false in the section scale, the following is displayed on the form:

```
Choose One

Not Observed

Does Not Meet

Meets

Exceeds
```

In this case, the user can either leave it unchanged or select a rating. If left unchanged, it displays `Choose One` and the actual rating is null (unrated). If Not Observed, the `<unrated-rating>`) is selected, it shows `Not Observed` and the actual rating is be treated as null and unrated as well.

In Document Export, `<default-rating>` is still being exported as a blank value in the rating column. If `<unrated-rating>` is explicitly selected, then its string value is being exported as the rating in the rating column.

13.12.2 XML Example: Require a Manager to Enter a Rating

```
<blind-spot-threshold>0.0</blind-spot-threshold>
*<required-fields>*
*<role-name>EM</role-name>
       <field refid="item-rating" min-value="-1.0" max-value="-1.0"/>
       <route-step stepid="phase3"/>*
          *       <send-action sendid="next_step"/>
       <send-action sendid="sign"/>*
     *</required-fields>*
```

Send-action with the following supported `sendid`

The following send actions are used in the Performance Management review form:

- `inner_step_send`: send within in iterate step or send to someone within the current step or someone's reply within the current step
- `next_step`: move the form into next step
- `sign`: sign action in the signature step. There is usually a sign/reject option in the signature step)

The following send action is used in 360 forms:

- `complete_360`: complete 360
- `save`: save the form
- `save_and_close`: save and close the form

13.12.3 XML Example: Specifying Rating Labels

```
<fm-sect-config>
          *<rating-label><![CDATA[Rating]]></rating-label>*
          *<rating-label-others><![CDATA[Rating]]></rating-label-others>*
      <default-rating><![CDATA[unrated]]></default-rating>
      <hidden-strength-threshold>0.0</hidden-strength-threshold>
      <blind-spot-threshold>0.0</blind-spot-threshold>
        <section-permission type="hidden">
          <role-name>*</role-name>
         </section-permission>
          <num-decimal-places>2</num-decimal-places>
         <publish-button-label><![CDATA[Publish Content]]></publish-button-label>
          </fm-sect-config>
```

13.12.4 XML Example: Custom Comment Labels when Split Comments Are Not Used

To include the name of the person entering the comments use (0).

```
<fm-sect-config>
  <rating-label><\!\[CDATA[Description]\]></rating-label>
  <rating-label-others><\!\[CDATA[Description]\]></rating-label-others>
  <default-rating><\!\[CDATA[Select a Descriptor]\]></default-rating>
  <hidden-strength-threshold>0.0</hidden-strength-threshold>
```

```
  <blind-spot-threshold>0.0</blind-spot-threshold>
  <section-permission type="disabled">
    <role-name>EMM</role-name>
    <role-name>EH</role-name>
    <route-step stepid="*"/>
  </section-permission>
  <section-permission type="enabled">
    <role-name>E</role-name>
    <role-name>EM</role-name>
    <route-step stepid="*"/>
  </section-permission>
  \*<default-section-comments-label><\!\[CDATA\[Summary comments by {0}\]\]></
default-section-comments-label>\*
  \*<default-item-comments-label><\!\[CDATA\[Support description using STAR
(comments by {0})\]\]></default-item-comments-label>\*
  <num-decimal-places>2</num-decimal-places>
  <publish-button-label><\!\[CDATA[Publish Content]\]></publish-button-label>
</fm-sect-config>
```

13.12.5 XML Example: Custom Comment Labels when Split Comments Are Used

The following code can be used to change the subject comments in a split format section.

```
<?xml version="1.0" encoding="UTF-8"?>
<!DOCTYPE objective-sect SYSTEM "sf-form.dtd">
<objective-sect index="5" configurable="false" mgt-only="false" use-jobcode="false"
no-rate="true" develop-goal="false" show-learning-activity-competency="false" no-
weight="true" summ-opt="0" split-cmt="true" rating-opt="1" cmt-opt="1" in-summ-
display="false" in-overall-rating="false" no-group="false" use-milestone="false"if-
no-ratings-then-ignore-section="false" lock-item-weights="false" in-objcomp-summ-
display="false" in-objcomp-summ-overall-rating="false" auto-pop-weights="false"
show-obj-expected-rating="false" min-goals-required="-2147483648" max-goals-
allowed="2147483647" allow-draft-tgm-goals="false" hide-addexistinggoals-
btn="false" sect-mode="normal" ez-rater-expand-all="false">

    <obj-sect-name><![CDATA[]]></obj-sect-name>

    <fm-sect-config>
          <section-color><![CDATA[#ffffff]]></section-
color>
          <rating-label><![CDATA[Rating]]></rating-
label>
          <rating-label-others><![CDATA[Rating]]></rating-label-
others>
          <default-rating><![CDATA[unrated]]></default-
rating>
          <hidden-strength-threshold>0.0</hidden-strength-
threshold>
          <blind-spot-threshold>0.0</blind-spot-
threshold>
          <section-comments-label><![CDATA[List Your Strengths:]]></section-
comments-label>
          <section-comments-blank-indicator><![CDATA[]]></section-comments-blank-
indicator>
        <section-manager-comments-label><![CDATA[Manager's List:]]></section-
manager-comments-label>
          <section-subject-comments-label><![CDATA[Employee's List:]]></section-
subject-comments-label>
          <num-decimal-places>2</num-decimal-places>
          <publish-button-label><![CDATA[Publish Content]]></publish-button-label>
     </fm-sect-config>
```

```
    <sect-weight>0.0</sect-weight>
     <obj-sect-type><![CDATA[]]></obj-sect-type>
     <obj-sect-plan-id>-1</obj-sect-plan-id>
    <meta-grp-label><![CDATA[Group]]></meta-grp-label>
</objective-sect>
```

```
<manager-comments-label><![CDATA[new label]]></manager-comments-label>
<subject-comments-label><![CDATA[new label]]></subject-comments-label>
```

13.12.6 Custom Comment Labels

You can create custom comment label for each raters.

XML Example: Use `<section-manager-comments-label>` `<section-subject-comments-label>` elements to create custom comment label for Managers and Employees.

```
<blind-spot-threshold>0.0</blind-spot-threshold>
<section-comments-label><![CDATA[List Your Strengths:]]></section-comments-label>
<section-comments-blank-indicator><![CDATA[]]></section-comments-blank-indicator>
<section-manager-comments-label><![CDATA[Manager'''s List:]]></section-manager-
comments-label>
<section-subject-comments-label><![CDATA[Employee'''s List:]]></section-subject-
comments-label>
<num-decimal-places>2</num-decimal-places>
<publish-button-label><![CDATA[Publish Content]]></publish-button-label>
</fm-sect-config>
<sect-weight>0.0</sect-weight>
```

Note

You need to type ''' to get an apostrophe in the custom label output. For, example "Manager's Comments".

13.12.7 Example: Actual vs. Potential Ratings by Modifying the Weights Element

In this example the weight field displays as Potential Points. You set a weight for each competency that is not configurable by the user.

In the overall summary section again, label the weight field to potential points. This gives you side-by-side actual and potential points. The section weight is fixed and is turned off, because it would also display in the potential points column. If it is important to display that in the overall summary section, add it to the section title.

```
<?xml version="1.0" encoding="UTF-8"?>
<!DOCTYPE competency-sect SYSTEM "sf-form.dtd">
<competency-sect index="3" configurable="false" mgt-only="false" use-
jobcode="false" category-filter-opt="no-filter" no-rate="false" no-weight="false"
summ-opt="999" split-cmt="false" rating-opt="0" cmt-opt="2" suppress-item-
comments="0" behavior-rating-opt="0" behavior-cmt-opt="1" behavior-mode-opt="0" in-
summ-display="true" in-overall-rating="true" no-group="false" use-
behavior="false"if-no-ratings-then-ignore-section="false" lock-item-weights="true"
in-objcomp-summ-display="false" in-objcomp-summ-overall-rating="false" show-comp-
```

```
expected-rating="false" comp-expected-rating-format="0" show-behavior-expected-
rating="false" behavior-expected-rating-format="0" behavior-weighted="false">

<comp-sect-name><![CDATA[COMPETENCIES/PERFORMANCE CONTRIBUTIONS]]></comp-sect-name>
<comp-sect-intro><![CDATA[<p><p><p>]]></comp-sect-intro>
<fm-sect-config>
    <rating-label><![CDATA[Rating]]></rating-label>
     <rating-label-others><![CDATA[Rating]]></rating-label-others>
     <default-rating><![CDATA[unrated]]></default-rating>
     <hidden-strength-threshold>0.0</hidden-strength-threshold>
     <blind-spot-threshold>0.0</blind-spot-threshold>
     <hide-weight-percent-sign />
     <weight-label><![CDATA[Potential Points]]></weight-label>
     <show-points/>
     <num-decimal-places>2</num-decimal-places>
     <publish-button-label><![CDATA[Publish Content]]></publish-button-label>
</fm-sect-config>
<sect-weight>50.0</sect-weight>
<fm-sect-scale show-value="false">
     <scale-source>1</scale-source>
     <scale-id><![CDATA[Performance Criteria]]></scale-id>
     <scale-type><![CDATA[null]]></scale-type>
</fm-sect-scale>
<comp-category><![CDATA[Jobs on Target]]></comp-category>
<fm-competency index="0" removable="false">
    <fm-comp-id>1</fm-comp-id>
     <fm-comp-name><![CDATA[null]]></fm-comp-
name>
     <fm-comp-desc><![CDATA[null]]></fm-comp-desc>
     <fm-comp-weight><![CDATA[10]]></fm-comp-weight>
</fm-competency>
<fm-competency index="1" removable="false">
     <fm-comp-id>2</fm-comp-id>
     <fm-comp-name><![CDATA[null]]></fm-comp-name>
     <fm-comp-desc><![CDATA[null]]></fm-comp-desc>
     <fm-comp-weight><![CDATA[10]]></fm-comp-weight>
</fm-competency>
</competency-sect>
```

13.12.8 Summary Section

This is an example of fm-sect-config in the summary section.

```
<?xml version="1.0" encoding="UTF-8"?>
<!DOCTYPE summary-sect SYSTEM "sf-form.dtd">
<summary-sect index="5" mgt-only="false" manual-rating="true" override-
unrated="false" split-cmt="false" rating-opt="0" cmt-opt="0" show-listing="true"
rating-mode="text" use-adjusted-scale-for-section-header-rating="0" show-group-
matrix="true" overall-rating-display-order="manual-calc">>
    <summary-sect-name><![CDATA[Review Summary]]></summary-sect-name>
     <summary-sect-intro><![CDATA[Use this section to summarize the employee's
performance during the review period.]]></summary-sect-intro>
    <fm-sect-config>
        <rating-label><![CDATA[Rating]]></rating-label>
          <rating-label-others><![CDATA[Rating]]></rating-label-others>
          <default-rating><![CDATA[unrated]]></default-rating>
          <hidden-strength-threshold>0.0</hidden-strength-threshold>
          <blind-spot-threshold>0.0</blind-spot-threshold>
          <hide-weight-percent-sign/>
          <weight-label><![CDATA[Potential Points]]></weight-label>
          <num-decimal-places>2</num-decimal-places>
          <publish-button-label><![CDATA[Publish Content]]></publish-button-label>
     </fm-sect-config>
```

```
      <field-permission type="read">
         <role-name>*</role-name>
           <field refid="manual-overall-rating"/>
      </field-permission>
      <field-permission type="write">
           <role-name>EM</role-name>
           <field refid="manual-overall-rating"/>
      </field-permission>
</summary-sect>
```

13.13 fm-sect-scale

This is an optional element that is used to associate a rating scale with the section.

Requirements

To enable using ratings in an objective or competency section set no-rate="false" (no-rate="false" is the default setting when you create an objective or competency section in Provisioning)

> **Remember**
>
> As a customer, you do not have access to Provisioning. To complete tasks in Provisioning, contact SAP Cloud Support.

You can only map one rating scale per objective/competency section.

In a Performance Management v12 Acceleration form, when there is no rating scale configured in the goal or competency section, the rating will only show the defined unrated rating and default rating. It won't show as an editable text field.

If a rating scale is mapped then the scale can be displayed as a drop down list and not as a radio button.

For example:

```
<sect-weight>0.0</sect-weight>
<fm-sect-scale show-value="true">
    <scale-id><![CDATA[Default Scale]]></scale-id>
    <scale-type><![CDATA[DROPDOWN]]></scale-type>
</fm-sect-scale>
```

> **Note**
>
> In Performance Management v12 Acceleration, bar, radio button and freetext scale types are not supported. You will not be able to use these scale types, neither in the competency section nor in the summary section.
>
> Furthermore, the rating scale will automatically switch to a drop-down when there are more than 5 rating values, which cannot be changed.

The same rating scale can be used in multiple forms.

Ratings can be configured to be displayed as follows:

- rating-opt="0": default, no ratings are displayed next to each user's comment
- rating-opt="1": the rating scale is displayed next to the subject's comment
- rating-opt="2": the rating scale is displayed next to all evaluators' comments
- rating-opt="3": rating scales by the manager and the subject are displayed side-by-side

To include objective/competency ratings in an overall summary section set the objective/competency section configuration option in-overall-rating="true" (This is set to true by default when you create an objective or competency section in Provisioning)

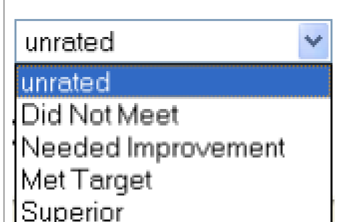
Recommend that even though a form may have multiple rating scales mapped to different sections of the form, the rating scales should have the same point scale

Expected ratings can be set for role-based competencies and behaviors (applicable in 360s, succession planning and reporting)

DTD Definition

```
<!ELEMENT fm-sect-scale (scale-source?, scale-id, scale-type?, scale-value*, scale-adjusted-calculation?)>
      <!ATTLIST fm-sect-scale show-value (true | false) "true" reverse-scale (true |false) #IMPLIED >
```

Attributes

Option	Valid Values	Description
show-value	show-value="true" show-value="false"	fm-sect-scale show-value=true: the rating displays a star fm-sect-scale show-value=false: the rating displays a list 

Elements

scale-id	The name of the rating scale to be used.

scale-type	Valid values include DROPDOWN Example <![CDATA[null]] or <![CDATA[DROPDOWN]]: drop down list

13.13.1 Mapping a Rating Scale to a Section

Context

By default when you add a new objective or competency section through Provisioning, a rating scale is not automatically associated with the section. And by default, the section is configured to show ratings, for example, `no-rate="false"`. Hence the net effect is that a rating field does appear underneath each objective/competency in the section but instead of a drop down list the rating field will appear as a text field.

Procedure

- If you want to map a rating scale to the section so that a drop down list of values appears to the reviewer, then you must add the following XML tags beneath the `<sect-weight>0.0</sect-weight>` tag (the `<sect-weight>` tag is automatically included when you add a section in *Provisioning*).

  The following example will display the rating scale called *Default Scale* as a drop down list in the section.

  ```
  <sect-weight>0.0</sect-weight>
   <fm-sect-scale show-value="true">
    <scale-id><![CDATA[Default Scale]]></scale-id>
    <scale-type><![CDATA[null]]></scale-type>
   </fm-sect-scale>
  ```

- **When a rating scale is not specified in an objective section:**
- When `no-rate="false"` and no scale has been mapped, the rating label is not hyper-linked as there is when a rating scale mapped.

Example

XML Example: Rating Scale in an Objective Section

Key Points –

```
<rating-label><![CDATARating ]></rating-label><-main rating scale label; used in
calculated score
<rating-label-others><![CDATARating ]></rating-label-others> <- label for rating-
opt="1" or "2"
<default-rating><![CDATAunrated ]></default-rating> <- default value when no
rating selected
<objective-sect index="3" configurable="true" mgt-only="false" use-
jobcode="false" no-rate="false" no-weight="false" summ-opt="999999" split-
```

```
cmt="false" rating-opt="0" cmt-opt="0" in-summ-display="true" in-overall-
rating="true" no-group="true" use-milestone="false"if-no-ratings-then-ignore-
section="false" lock-item-weights="false">
    <obj-sect-name><![CDATA[Performance Objectives]]></obj-sect-name>
     <obj-sect-intro><![CDATA[Objective Intro Text]]></obj-sect-intro>
     <fm-sect-config>
        <rating-label><![CDATA[Rating]]></rating-
label>
          <rating-label-others><![CDATA[Rating]]></rating-label-
others>
          <default-rating><![CDATA[unrated]]></default-
rating>
          <hidden-strength-threshold>0.0</hidden-strength-
threshold>
          <blind-spot-threshold>0.0</blind-spot-threshold>
     </fm-sect-config>
     <sect-weight><![CDATA[0.0]]></sect-weight>
     <fm-sect-scale show-value="true">
        <scale-id><![CDATA[Default Scale]]></scale-id>
          <scale-type><![CDATA[null]]></scale-type>
     </fm-sect-scale>
     <obj-sect-type><![CDATA[plan]]></obj-sect-type>
     <obj-sect-plan-id>1</obj-sect-plan-id>
     <meta-grp-label><![CDATA[Group]]></meta-grp-label>
</objective-sect>
```

13.13.2 Reversing Rating Scales

Use the reverse-scale option to not only reverse the order of the rating scale so that 1 is a high score and 5 is a low score, but also the values. The highest value will become the lowest number. For example, 1 will become the highest value and appear at the bottom of the rating picklist.

Context

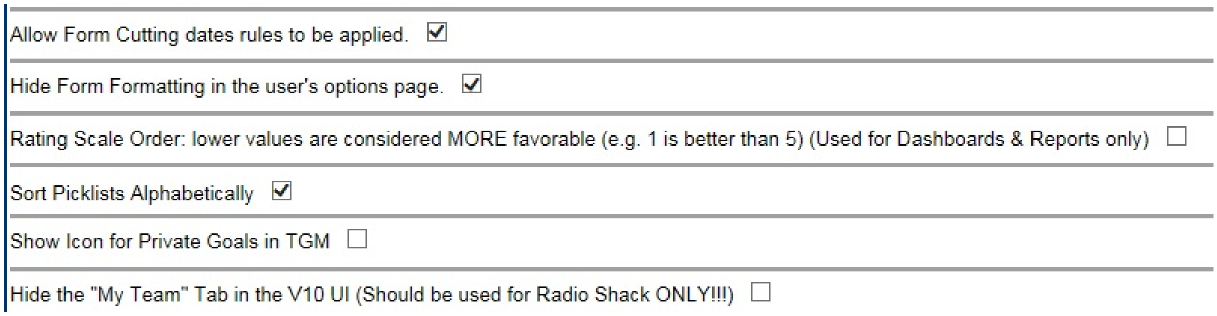
Remember

As a customer, you do not have access to Provisioning. To complete tasks in Provisioning, contact SAP Cloud Support.

Procedure

1. In Provisioning go to *Company Settings*.

2. Scroll down the page and select the option: *Rating Scale Order: lower values are considered MORE favorable (e.g. 1 is better than 5)*



This option is used only for dashboards and reports.

13.13.3 Reversing the Order of a Rating Scale (5 – Exceed Expectations...1 – Failed to Meet)

You can reverse the presentation order of the scale values so that 5 (high) appears at the top and 1 (low) appears at the bottom by using this code everywhere you have a scale tag line

> **Note**
>
> Make sure to reverse the scale values everywhere you have a rating scale for example, goals, competencies, and summary section, so that users aren't confused or prone to making rating errors.

This is different from Reversing a Scale in which 1 is the high value and 5 is the low value (this is managed in provisioning).

```
</fm-sect-config>\\
 <sect-weight>0.0</sect-weight>\\
 <fm-sect-scale show-value="true" reverse-scale="true">\\
 <scale-source>1</scale-source>\\
  <scale-id><\!\[CDATA[360 Importance Scale]\]></scale-id>
```

13.13.4 Limitations of Reverse Rating Scale

This section lists some of the known limitations that you will encounter while using Reverse rating scales.

- **Reverse rating scale doesn't work with expected rating:**: Expected rating is a value that admin sets for a job role for the competencies assigned to the particular job. So, whenever an employee tries to rate a competency, a value is shown below the rating which specifies the expected rating for that job role.
  Let us consider an example, where the expected rating for an individual Competency is set to 20%, and the default 5 points Rating scale is used (1 being the lowest rating and 5 being the highest), then the normalized expected rating for this scenario is shown as 1, which is considered as the lowest value. For the same expected rating of 20% for an individual Competency, if a Reverse rating scale is used, where 1 is considered as the highest rating and 5 as the lowest, the normalized expected rating will still be shown as 1, which is not correct, as 1 is considered as the highest rating in Reverse Rating Scale.

- **Reverse rating scale doesn't work with star rating format** : Reverse Rating Scale is always selected using a dropdown menu.
- **Reverse rating scale doesn't work with Obj-Comp summary section graph plotting**: The Objective Competency section calculates three scores: An Overall Objectives score, an Overall Competencies score, and an Overall Objective/Competency score. These scores are calculated as an aggregate of the ratings from all the objective sections and the competency sections and are plotted to determine the quadrant in which an employee falls on an optional obj-comp chart if the chart is configured.
  When a Reverse rating scale is used to calculate these scores, the quadrant doesn't change but it gives a negative impression to the user, as the scale for Objective and Competency in the graph doesn't change.

13.13.5 XML Example: Rating scale in an objective section

Key points are:

- <rating-label><![CDATARating]></rating-label> <- main rating scale label; used in calculated score
- <rating-label-others><![CDATARating]></rating-label-others> <- label for rating-opt="1" or "2"
- <default-rating><![CDATAunrated]></default-rating> <- default value when no rating selected

```
<objective-sect index="3" configurable="true" mgt-only="false" use-jobcode="false"
no-rate="false" no-weight="false" summ-opt="999999" split-cmt="false" rating-
opt="0" cmt-opt="0" in-summ-display="true" in-overall-rating="true" no-group="true"
use-milestone="false"if-no-ratings-then-ignore-section="false" lock-item-
weights="false">
    <obj-sect-name><![CDATA[Performance Objectives]]></obj-sect-name>
    <obj-sect-intro><![CDATA[Objective Intro Text]]></obj-sect-intro>
    <fm-sect-config>
        <rating-label><![CDATA[Rating]]></rating-label>
        <rating-label-others><![CDATA[Rating]]></rating-label-others>
        <default-rating><![CDATA[unrated]]></default-rating>
        <hidden-strength-threshold>0.0</hidden-strength-threshold>
        <blind-spot-threshold>0.0</blind-spot-threshold>
    </fm-sect-config>
    <sect-weight><![CDATA[0.0]]></sect-weight>
    <fm-sect-scale show-value="true">
        <scale-id><![CDATA[Default Scale]]></scale-id>
        <scale-type><![CDATA[null]]></scale-type>
    </fm-sect-scale>
    <obj-sect-type><![CDATA[plan]]></obj-sect-type>
    <obj-sect-plan-id>1</obj-sect-plan-id>
    <meta-grp-label><![CDATA[Group]]></meta-grp-label>
</objective-sect>
```

13.14 fm-element (Custom Fields)

This is used to display employee data in the userinfo-sect. It is also used to display custom fields. Custom fields can appear in competency, objective and custom sections.

> **Note**
>
> Custom fields do not support HTML with Performance Management v12 Acceleration.

Custom Field Requirements

Custom fields can be created as fields within a custom section, objective section, or competency section.

> **Remember**
>
> As a customer, you do not have access to Provisioning. To complete tasks in Provisioning, contact SAP Cloud Support.

Custom fields will be rendered vertically as stacked fields (i.e. it is not possible to lay out custom fields side-by-side on the same line).

In a custom section, custom fields appear only once in the entire section.

In an objective or competency section, custom fields will appear once below each objective and competency listed in the section.

DTD Definition

```
\\
<!ELEMENT fm-element (ekey, ename?, evalue?, elist?, text-size?, text-maxlength?)>
<!ATTLIST fm-element
 index CDATA #REQUIRED
 type (1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10) #REQUIRED
 checked (true | false) "false"
 min CDATA #IMPLIED
 max CDATA #IMPLIED
 sync-until-completion (true | false) "true"
 waca (true | false) "false"
>
\\
```

13.14.1 Attributes and Elements fm-element (Custom Fields)

Custom elements can exist outside the Custom Section.

This section describes all the attributes and elements of the custom fields.

Attributes

Option	Valid values	Description
index	numeric	Displays the order of user data elements in the form. The first element displayed should be set to `index="0"`.

Option	Valid values	Description
type		Specifies the data type to be displayed. When displaying data from the Employee table make sure you specify the corresponding data type. 1 – Section – internal use 2 – Label – a bolded label 3 – Text – one-line text area 4 – Textarea – multi-line text box that can have legal scan and spell check 5 – Date – a data type 6 – List – drop down lists 7 – Integer – a data type 8 – Double – a data type 9 – Checkbox – a checkbox labeled item
checked		Only applicable to CHECKBOX elements
min		Minimum value of this element. If this is applied to a Date Type Element, the min value will be a min. days back to be validated. It will also take value such as 0 for current day, -1 for yesterday etc. It does not support positive values. Currently, this is only applicable to Date Type element.
max		Max value of this element. If this is applied to a Date Type Element, the max value will be the max. days ahead to be validated. It will also take value such as 0 for current day, +1 for tomorrow. It does not support negative values. Currently, this is only applicable to Date Type element.
sync-until-completion		This is used to sync a User Info element with values in the database in Employee section until document completion. By default, each data element displayed reflects the user data that is current at the time the form is opened. To preserve the user information that existed at the time the form was created, even if the user's information changes after the form was created, set `sync-until-completion="false"` For example you might want to set `sync-until-completion="false"` for the user's job title so this data element always displays the job title the user had at the time the form was created.
waca		Whether to show the writing assistant. This is applied to TEXTAREA type element.

Elements

Option	Description
ekey	When used for displaying data from the Employee table the text entered should reflect the static name as listed in the 1st row of the user import file. When used for a custom field: the ekey value should always be one word (mixed case and underscores are supported) the ekey value must be unique for each custom field within the same form. Provisioning does not complain if you re-use the same ekey value but form reviewers may notice the problem and it will also present a problem in reporting.
ename	When used for displaying data from the Employee table this should be left "blank" If you were to enter text in the <ename> tag the text would be ignored since the text will always reflect the text that is associated with the field in the User Directory Settings. When used for custom fields this is the filed label that appears on the form. The value should be 128 characters or less otherwise this will present a problem if any custom database reports need to be run on the data
evalue	When used for displaying data from the Employee table no value should be specified. **Note** If you use a checkbox type you must specify the evalue such as True, Y, Yes. This is the value that is stored when user checks the box. If you do not specify a value, then no value is stored in the database.
elist	This is for LIST type only. If picklist is defined, the element list is loaded from the picklist
text-size	Display width of the text field in pixel
text-maxlength	Max number of characters allowed for the text field. If the field is textarea, a warning will be displayed under the widget to warn input exceeding the limit, but we won't truncate the input.

13.14.2 Elist element—a drop down list

The elist element is for the List type only. If a picklist is defined, the element list is loaded from the picklist

```
DTD Definition <!ELEMENT elist (elist-element*, picklist?)>
 <!ATTLIST elist elist-value-type (3 | 5 | 7 | 8) "7" elist-default-name CDATA "N/A"
elist-default-value CDATA ""
elist-value-type Restricted to the following types:
3 - Text - one-line text area
5 - Date - a data type
7 - Integer - a data type
>
\\
```

13.14.3 XML Example: Employee data in userinfo-sect

```
\\
<fm-element index="1" type="3" sync-until-completion="true">
           <ekey><![CDATA[FIRSTNAME]]></ekey>
           <ename><![CDATA[]]></ename>
            <evalue><![CDATA[]]></evalue>
        </fm-element>
        <fm-element index="2" type="3" sync-until-completion="true">
           <ekey><![CDATA[TITLE]]></ekey>
           <ename><![CDATA[]]></ename>
           <evalue><![CDATA[]]></evalue>
        </fm-element>
\\
```

13.14.4 XML Example: Custom Checkbox Field

Example with:

- ekey – used to identify the element in report exports (*** specify a one-word value only ***)
- ename – the name/label which is displayed with the element on the form (can include html tags)
- evalue – use to pre-populate a default value in the field

Note

If you use a checkbox type you must specify the evalue (e.g., True, Y, Yes). This is the value that is stored when user checks the box. If you do not specify a value, then no value is stored in the database.

```
\\
 <fm-element index="0" type="9">
  <ekey><![CDATA[EmpMgrMeetingCheckBox]]></ekey>
  <ename><![CDATA[<b>Check  to indicate that the Employee Dialog Meeting has 
occurred</b>]]></ename>
  <evalue><![CDATA[Y ]]></evalue>
 </fm-element>
\\
```

13.14.5 XML Example: Custom Field with a Drop Down List

Example with:

- elist-default-name – first item displayed in drop down list
- elist-default-value – actual value report if no other value selected
- elist-name – displayed in drop down list to user
- elist-value – actual value reported in report exports

```
\\
 <fm-element index="4" type="6">
    <ekey><![CDATA[SumCareerObj]]></ekey>
      <ename><![CDATA[Employee's job satisfaction:]]></ename>
```

```
      <evalue><![CDATA[]]></evalue>
      <elist elist-value-type="7" elist-default-name="None Selected" elist-default-
value="">
         <elist-element elist-index="0" elist-selected="false">
            <elist-name><![CDATA[Satisfied with current position]]></elist-name>
            <elist-value><![CDATA[Satisfied]]></elist-value>
         </elist-element>
         <elist-element elist-index="1" elist-selected="false">
            <elist-name><![CDATA[Interested in future opportunities]]></elist-name>
            <elist-value><![CDATA[Disatisfied]]></elist-value>
          </elist-element>
        </elist>
 </fm-element>
```

13.14.6 XML Example: Custom Field in a Competency Section

This code is used to define a field that is displayed between the description and the rating of each of the competencies in the section.

When you define an additional comment field or dropdown, it appears for each item and not just once per section.

```
\\
<sect-fm-elements>
  <fm-element index="0" type="4">
   <ekey><![CDATA[DA1]]></ekey> The key which identified this element in export
files.
  <ename><![CDATA[Development Actions to be Taken:]]></ename> The name which is
displayed with this element on the form.
   <evalue><![CDATA[]]></evalue> The default value forthis element.
  </fm-element>
 </sect-fm-elements>
\\
```

13.14.7 XML Example: Custom Field in an Objective Section

This code is used to define a field that is displayed between the description and the rating of each of the objectives in the section.

When you define an additional comment field or dropdown, it appears for each item and not just once per section

```
\\
<objective-sect index="3" configurable="true" mgt-only="false" use-jobcode="false"
no-rate="false" no-weight="false" summ-opt="999999" split-cmt="false" rating-
opt="0" cmt-opt="0" in-summ-display="true" in-overall-rating="true" no-group="true"
use-milestone="false"if-no-ratings-then-ignore-section="false" lock-item-
weights="false">
 <obj-sect-name><![CDATA[Performance Objectives]]></obj-sect-name>
 <obj-sect-intro><![CDATA[Objective Intro Text]]></obj-sect-intro>
 <fm-sect-config>
  <rating-label><![CDATA[Rating]]></rating-label>
  <rating-label-others><![CDATA[Rating]]></rating-label-others>
  <default-rating><![CDATA[unrated]]></default-rating>
  <hidden-strength-threshold>0.0</hidden-strength-threshold>
  <blind-spot-threshold>0.0</blind-spot-threshold>
 </fm-sect-config>
 <sect-weight><![CDATA[0.0]]></sect-weight>
```

```
  <fm-sect-scale show-value="true">
   <scale-id><![CDATA[Default Scale]]></scale-id>
   <scale-type><![CDATA[null]]></scale-type>
  </fm-sect-scale>
  <obj-sect-type><![CDATA[plan]]></obj-sect-type>
  <obj-sect-plan-id>1</obj-sect-plan-id>
  <sect-fm-elements>
       <fm-element index="0" type="4">
         <ekey><![CDATA[PerformanceMeasures]]></ekey>
         <ename><![CDATA[<b>Performance Measures:</b>]]></ename>
         <evalue><![CDATA[]]></evalue>
       </fm-element>
   </sect-fm-elements>
…
</objective-sect>
\\
```

13.15 Form-Specific Permissions

Summary of the permission options

Permission	Type of Access	Description
action permissions	• enabled – user can see and click the add-item and/or remove item button (default) • none – user can't see the button	• Controls buttons in the Objective or Competency section • Code in competency-sect or objective-sect
button permissions	• enabled – user can see and click the button (default) • none – user can't see the button	• Controls buttons in the Route Map • Code in the Meta Section
field permissions	• none – user can't see the fields • read – user may read the fields • write – user may read and write	• Controls who can read and update data in individual fields
others-rating-tab-item-permission	• enabled – selected roles can view ratings and comments made by other roles • hidden – can be hidden in all relevant sections: goal, development, competencies	• Adds granular permissions to the rating to control the visibility of others' ratings and comments separately on a section level. • Determines if the ratings and/or comments of an employee made by other people than the logged-in user can be viewed. • This permission can be controlled on a role/route-step level.
section permission	• enabled – user can see the section (default) • disabled – user can see the section with read only on fields • hidden – user can't see the section	• Controls if a section can be viewed and/or edited

Related Information

Configuring Attachments [page 217]

13.15.1 action-permission

The action-permission element is an optional sub-element of a competency-sect and objective-sect. It is added below the </fm-sect-config> tag.

Type of Access

- enabled – user can see and click the add-item and/or remove item button (default)
- none – user can't see the button

XML Example: Employee can't add/remove items

Employee is not able to add or remove objectives in any step of the route map.

```
<action-permission type="none"> <role-name>E</role-name> <action refid="add-
item" /> <action refid="remove-item" /> <route-step stepid="*"/></action-permission>
```

XML Example: Only manger is able to add/remove items

No one can add or remove competency or goal; then, manager is given permission to do so

```
<action-permission type="none">
<role-name>*</role-name>
<action refid="add-item"/>
<action refid="remove-item"/>
</action-permission>
<action-permission type="enabled">
<role-name>EM</role-name>
<action refid="add-item"/>
<action refid="remove-item"/>
</action-permission>
```

13.15.2 button-permission

Button permissions are added in the Meta section. A button permission supports all the same roles as action and field permissions.

Type of Access

- enabled – user can see and click the button (default)
- none – user can't see the button

Buttons that can be permissioned

Please refer to sf-form.dtd for the complete list of supported roles and permissions.

Buttons	Descriptions
get-comments	When enabled, the *Get Feedback* button is available to get comments for the particular set of users. Note this button can be hidden from all users by checking the appropriate boxes on the Form Template administration page.
get-edits	When enabled, the *Get Feedback* button is available to get edits for the particular set of users. Note this button can be hidden from all users by checking the appropriate boxes on the Form Template administration page.
reject	When enabled, the *Reject* button is available to the particular set of users
delete	When enabled, the *Delete* button is available to the particular set of users. For more information, see the Configuration Guide here.
send	When enabled, the *Send* button is available to the particular user
sign	When enabled, the *Sign* button is available to the particular user
add-signer	When enabled, the *Add Signer* button is available to the particular set of users
add-modifier:	When enabled, the *Add Modifier* button is available to the particular set of users.
overall-score-pod	When enabled, the *Overall Score* pod is available in Performance Management v12 Acceleration forms.
gap-analysis-pod	When enabled, the *Gap Analysis* pod is abailable in Performance Management v12 Acceleration forms.

Buttons	Descriptions
incomplete-items-pod	When enabled, the *Incomplete Items* pod is available in Performance Management v12 Acceleration forms.
team-rank-pod	When enabled, the *Team Rank* pod is available in Performance Management v12 Acceleration forms.
supporting-information-pod	When enabled, the *Supporting Information* pod is available in Performance Management v12 Acceleration forms.
send-back	When enabled, the *Send Back* button is available in Performance Management v12 Acceleration forms.

Example: Employee is the only person who can't see the Get-Feedback button in all route steps

```
<button-permission type="none"> <role-name>E</role-name> <button refid="get-
comments"/> <route-step stepid="*"/></button-permission>
<button-permission type="none"> <role-name>E</role-name> <button refid="get-
edits"/> <route-step stepid="*"/></button-permission>
```

Example: Manager is the only person who can see the Add Modifiers button in all route steps

```
<button-permission type="none">
              <role-name>*</role-name>
              <button refid="add-modifier" />
              <route-step stepid="*" />
</button-permission>
<button-permission type="enabled">
              <role-name>EM</role-name>
              <button refid="add-modifier" />
              <route-step stepid="*" />
</button-permission>
```

13.15.3 field-permission

You can control who can manipulate certain form fields using roles and permissions.

For example, you can configure which roles have the ability to read or edit item ratings, weights, and groups, and the summary section Overall Rating.

13.15.3.1 Type of Access

- none – user can't see the fields
- read – user may read the fields
- write – user may read and write

13.15.3.2 Fields That Can be Permissioned

This is the list of fields that are currently supported.

Please refer to sf-form.dtd for the complete list of supported roles and permissions.item-rating: objective or competency ratings. Only supported in a competency or objective section. It also affect split rating's(rating-opt=3) manager's item rating.

- sect-weight: Allows user to edit section weight.
- subject-item-rating: Affect subject's item rating in split rating.
- item-group: objective or competency groups. Only supported in a competency or objective section.
- item-weight: objective or competency weights. Only supported in a competency or objective section.
- manual-overall-rating: summary section's manual overall rating. Only supported in the Summary section.
- calculated-overall-rating: summary section's calculated overall rating. (may or may not be the "Overall Rating") Only supported in the Summary section. This field is never editable, so "write" is interpreted as "read" for this field.

The following fields are used in the obj-comp-summary section. They are used to separate control objective and/or competency rating. Used to control the visibility of the calculated competency rating section in a competency section where rate by behaviors is turned on. The only values that are valid are NONE and READ because it is calculated.

- comp-manual-overall-rating:
- comp-calculated-overall-rating:
- obj-manual-overall-rating:
- obj-calculated-overall-rating:

13.15.3.3 Example: Field Permission Assigned by Role and Route Map Step

Hide the object rating using field permission based on role, field name, and route map step.

```
<field-permission type="none">
<role-name>*</role-name>
<field refid="item-rating"/>
<route-step stepid="*"/>
</field-permission>
```

13.15.3.4 Example: Field Permission Assigned by Role

The example assigns the following field permissions:

- Everyone will be able to at least read the item ratings, weights, and groups in the section.
- The manager (EM) will be able to edit the rating and the weight, but not the group.
- The subject of the form (E) will be able to edit the group and the weight, but not the rating.

```
<field-permission type="read">
<role-name>*</role-name>
<field refid="item-rating"/>
<field refid="item-weight"/>
<field refid="item-group"/>
</field-permission>
<field-permission type="write">
<role-name>EM</role-name>
<field refid="item-rating"/>
<field refid="item-weight"/>
</field-permission>
<field-permission type="write">
<role-name>E</role-name>
<field refid="item-group"/>
<field refid="item-weight"/>
</field-permission>
```

13.15.3.5 Example: Making Custom Fields Required

The code below to require 5 characters in a text box. When 5 or fewer characters were entered, the following error message pops up:

When more than 5 characters were entered, the document could be sent to the next stage.

```
<required-fields>
    <role-name>EM</role-name>
    <field refid="custom-element" min-value="1.0" max-value="-5.0">
        <ekey>target1</ekey>
    </field>
    <route-step stepid="manager"/>
    <send-action sendid="next_step"/>
</required-fields>
<num-decimal-places>2</num-decimal-places>
<publish-button-label><![CDATA[Publish Content]]></publish-button-label>
</fm-sect-config>
<fm-element index="0" type="4">
    <ekey><![CDATA[target1]]></ekey>
    <ename><![CDATA[Areas for Development:]]></ename>
    <evalue><![CDATA[]]></evalue>
 </fm-element>
</fm-sect>
```

13.15.3.6 Examples: Assigning Permissions to Custom Fields

> **Note**
>
> Permissioning of custom field only works in Competency and Objective sections. It does NOT work in Custom sections.

```
<field-permission type="write"> <role-name>E</role-name> <ekey>target3</ekey>
<route-step stepid="*"/> </field-permission>
<field-permission type="read">
<role-name>*</role-name>
<ekey>Results_obj</ekey>
<route-step stepid="set_goals"/>
</field-permission>
```

13.15.3.7 Example: Field Permissions in an Objective Section

```
<objective-sect index="3" configurable="true" mgt-only="false" use-jobcode="false"
no-rate="false" no-weight="false" summ-opt="999999" split-cmt="false" rating-
opt="0" cmt-opt="0" in-summ-display="true" in-overall-rating="true" no-group="true"
use-milestone="false"if-no-ratings-then-ignore-section="false" lock-item-
weights="false">
 <obj-sect-name><![CDATA[Performance Objectives]]></obj-sect-name>
 <obj-sect-intro><![CDATA[Objective Intro Text]]></obj-sect-intro>
 <fm-sect-config>
  <rating-label><![CDATA[Rating]]></rating-label>
  <rating-label-others><![CDATA[Rating]]></rating-label-others>
  <default-rating><![CDATA[unrated]]></default-rating>
  <hidden-strength-threshold>0.0</hidden-strength-threshold>
  <blind-spot-threshold>0.0</blind-spot-threshold>
 </fm-sect-config>
 <field-permission type="read">
  <role-name>*</role-name>
  <field refid="item-rating"/>
  <field refid="item-group"/>
  <field refid="item-weight"/>
 </field-permission>
 <field-permission type="write">
  <role-name>EM+</role-name>
  <role-name>EH</role-name>
  <field refid="item-rating"/>
  <field refid="item-group"/>
  <field refid="item-weight"/>
 </field-permission>
        <sect-weight><![CDATA[0.0]]></sect-weight>
 …ETC…{anchor:_Toc152754851}{anchor:_Toc159306262}{anchor:_Toc177792716}
```

13.15.4 section-permission

Setting permissions comes after <blind-spot-threshold>0.0</blind-spot-threshold>.

Type of Access

- enabled – user can see the section (default)
- disabled – user can see the section with read only on fields
- hidden – user can't see the section

Permissioned

Please refer to sf-form.dtd for the complete list of supported roles and permissions.

- disabled – read only
- enabled – allows read and write
- hidden – section is not visible

Example: Making a section read only

This section is read only for everyone except for manager and employee

```
<section-permission type="disabled">
<role-name>*</role-name>
<route-step stepid="*"/>
</section-permission>
<section-permission type="enabled">
<role-name>EM</role-name>
<role-name>E</role-name>
<route-step stepid="*"/>
</section-permission>
```

Example: Hiding a section

This hides the signature section until ready for it in routing (stepid is whatever the number is in the route map)

```
<section-permission type="hidden">
<role-name>*</role-name>
<route-step stepid="7"/>
</section-permission>
```

13.15.5 Configuring Permissions for Reporting

Detailed Document Search

By default, *Detailed Document Search* disregards permissions and includes all fields, however, an administrator can require DDS to obey permissions when displaying fields by selecting the *Enforce permissioning for Detailed Document Search & Archive & Print Reporting* option in the *Form Template Settings* interface.

This option controls the form to be included in the Detailed Document Search and Archive and Print reports.

Archive and Print

The same setting enables the archive and print report to obey permissions for the logged-in user as well.

Form Info Page

You can choose to make step comments available to all Collaborative Step participants via the Form Info page.

To configure:

1. Enable the flag *Allow exit step comments to be visible to all participants in a Collaborative (C) Step (only applicable for forms that have not progressed beyond the C Step)* in the form template settings page.
2. Enable the *Comments* token in the Email notification template (Document Routing Notification template), and enable *Routing Notification.*

13.16 Live Profile

You can embed a popup link in the review form to just a single Employee Profile or Employee Scorecard portlet.

For example, you could embed a link in the Summary section to a window that shows only Badge information or only Education information. This popup window is essentially a shortcut to the actual portlet on the Profile or Scorecard page, so any changes you make here in the form will be reflected in the Profile or Scorecard page, too. To use this new option, contact SuccessFactors Customer Success to have your form template updated.

> **Remember**
>
> As a customer, you do not have access to Provisioning. To complete tasks in Provisioning, contact SAP Cloud Support.

The Profile and Scorecard configuration pages (Admin > Employee Files > Configure Employee Files > Profile or Scorecard > Edit) now include a Scorecard ID or Profile ID and the link attribute to embed into the form template. This information is unique to each company, so you'll need this information when you update the template.

The new notation to link to these portlets from a form is:

```
[[PORTLETLINK|scId|pId|some text]] scId - actual scorecard Id pId -
portlet Id some text - label of the link
```

14 Launching Forms

You can use the *Launch Forms* tool to launch the forms that you have created for a Performance Review or a 360 review process.

Prerequisites

Make sure that you have set up the following before launching a form:

- Performance Management or 360 Review Template
- Rating Scale
- Route Map

Context

Launch forms based upon templates that you create in the Manage Templates tool.

> **Note**
>
> We recommend that you do not schedule probation forms with hire date as 0 days, as there could be some delay (of a day or two) in importing the employee data into the system. If you schedule the probation forms with hire date as 0 days, any delay in the availability of employee information in the system can lead to failure in the scheduled creation of the forms.

> **Note**
>
> It is also recommended that you should not launch forms with hire date as 29th February. If you do so, the forms will be launched every four years.

Procedure

1. From the Admin Center, select *Performance Management* > *Launch forms*.
2. In the *Launch Forms* tool, select the type of form you want to launch. The form can be:
   - PM, Performance Management
   - 360 Review
3. Select the *Form Template* that you want to use.

   If you wish, you can either preview the template or cancel the launch and modify the template. When you are ready to move to the next step, click *Next*.

4. On the *Launch Date* page, select if you want the form to be launched just one time or on a recurring schedule.

Option	Description
One-time	When forms are launched for all employees at the same time regardless of their hire date. Then select either: ○ Now ○ Later, then enter a date
Recurring schedule	For an anniversary review process: SuccessFactors automatically launches the form. Select one of the options and enter ○ X days after employee's hire date ○ Y days before or after each employee's anniversary ○ the period and any additional dates that are required

5. Select the *Review Period* :

Option	Description
Dates configured for form	The dates as they appear on the form
Last calendar year	For example, 2013
This calendar year	For example, 2014
Custom dates	Start and End dates

6. Select the *Due date for completed forms*, which is the date on which the entire process is expected to be completed, and the *Performance profile*, then click *Next*.
7. Select the employees for whom you want to launch the form. They can be:

Option	Description
All active employees	You can also choose to include inactive employees You can control the visibility of this option in the Launch Form wizard, using "Hide "All active/inactive employees" option in Launch Forms wizard" in *Admin Center* > *Role Based Permission* > *<Permission>* > *User Permissions* > *General User Permissions* .
One individual employee	You can add several names to this list
A group of employees	Select either a predetermined group or use filters to find employees

You can also select the option to create only for users who don't have an existing form with an End Date that falls within a range. Click *Next*.

> **Note**

The selection of employees on the launch form wizard is dependent on your target population. Therefore, as an Admin when you are scheduling the launching of forms for a later date or for future recurring dates, you need to consider the fact that the user selection is derived out of the target population on the day of launching the form. If the employees in the target population is removed, or becomes inactive on the day of form launch, the forms will not be launched for those employees.

8. On the *Summary* page, review the sections and make any required changes. You can choose to:

- *Send email notifications to form recipients*. If you select this option, the first person in the route map process receives notification that a form has been created that he or she can access after logging in to SuccessFactors.
- Create an *En Route* copy

9. When you have confirmed your selections, click *Launch*.

Results

The form is launched. You can check progress from your reports tab.

Related Information

Reasons Why Forms Fail to Launch [page 430]

14.1 Launch Forms Immediately for Multiple Users Using CSV Upload

You can now launch forms immediately for multiple users, using only their User IDs, through CSV upload.

Prerequisites

To enable the Launch Forms tool in your application, go to *Admin Center* > *Manage Permission Roles* > *<Permission Role>* > *Permission* > *Administrator Permissions* > *Manage Form Templates*, and select *Mass Create Form Instances (Launch forms now)* to launch forms immediately. The Launch Forms tool is now available in your instance, and to access it, go to *Admin Center* > *Launch Forms*. The Launch Forms dialog box appears.

> Note
>
> To to schedule mass launching of forms at a later time and date, select *Schedule Mass Form Creation (Launch forms later)*.

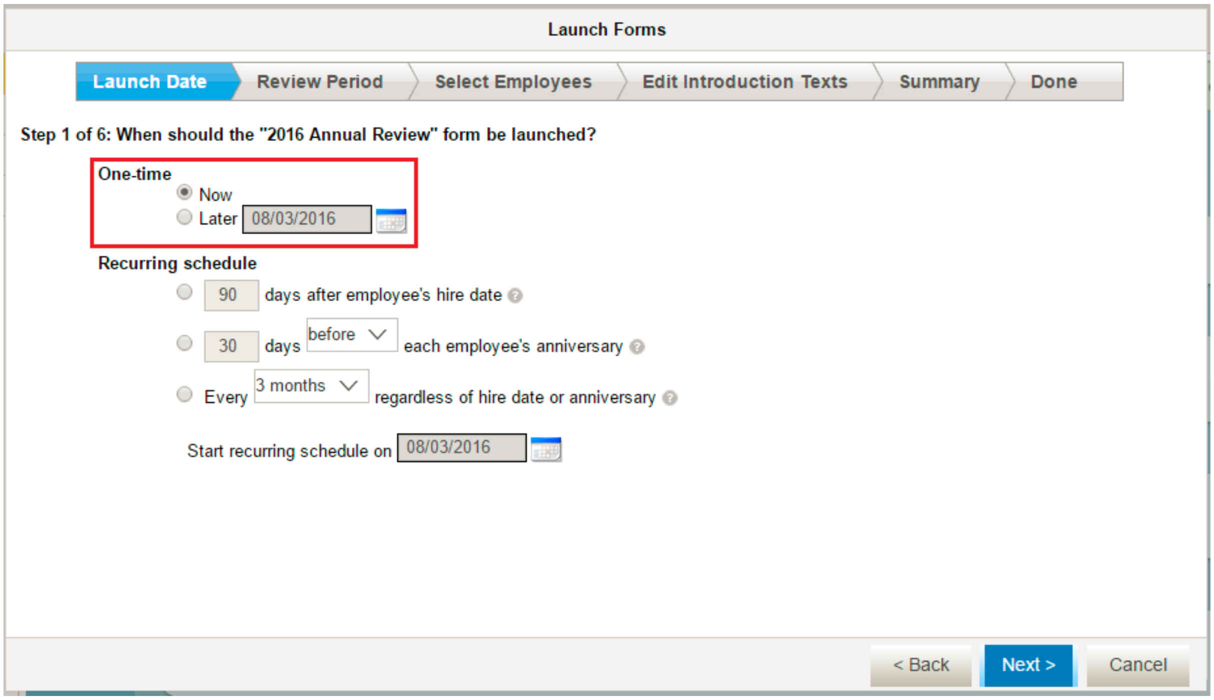
Context

Use CSV Upload to Launch Forms Immediately for Multiple Users

Procedure

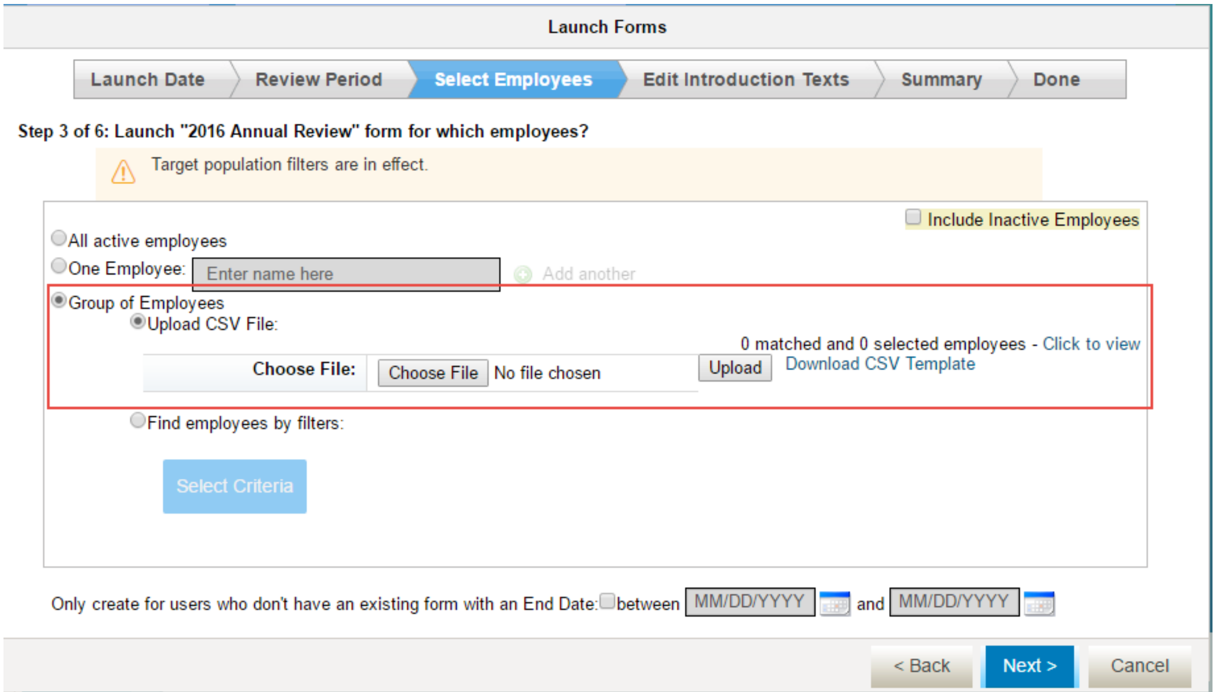
1. On the *Launch Forms* dialog box, select the *Form Template* you want to launch, and click *Next*.
2. On the *Launch Date* tab, under *One-time*, select *Now*, and click *Next*.

   > **Note**
   >
   > Currently, the CSV upload is only supported for the *One.time* > *Now* option.

3. On the *Review Period* tab, select appropriate values for *Review period*, *Due date for completed forms*, and *Performance profile*, and click *Next*.
4. On the *Select Employees* tab, select *Group of Employees*, and select *Upload CSV File*.

   > **Note**
   >
   > If you want to include the inactive employees in your selection, select *Include Inactive Employees*. There are three ways for selecting employees:
   > - *All active employees* - selects all the active employees in the organization
   > - *One Employee* - lets you select multiple users, by adding users one by one
   > - *Group of Employees* - lets you add multiple users, selected via use of Filters or using CSV file upload



5. In *Choose File*, navigate to the CSV file with user IDs of employees you will launch the forms for, and click *Upload*. The number of employees selected for form launch appear.

> **Note**
>
> If you do not have the CSV file, you can click the *Download CSV Template* link, add employee User IDs to the file, and then upload it to launch forms.

6. Click *Next*. If you have custom sections or custom elements marked for edit during the launch forms process, the *Edit Introductory Texts* tab appears, else, the *Summary* tab appears.
7. Update the *Edit Introductory Texts* tab, if applicable, and click *Next* to review the summary of the form you are about to launch.
8. If you are happy with the details appearing on the *Summary* tab, click *Launch*.
9. The confirmation for Launch Forms appears under the *Done* tab. Click *Close*, and you have successfully launched the form for multiple users, using the CSV upload.

14.2 Editing Introductory Text for Custom Texts and Updating Custom Elements in the Launch Forms Process

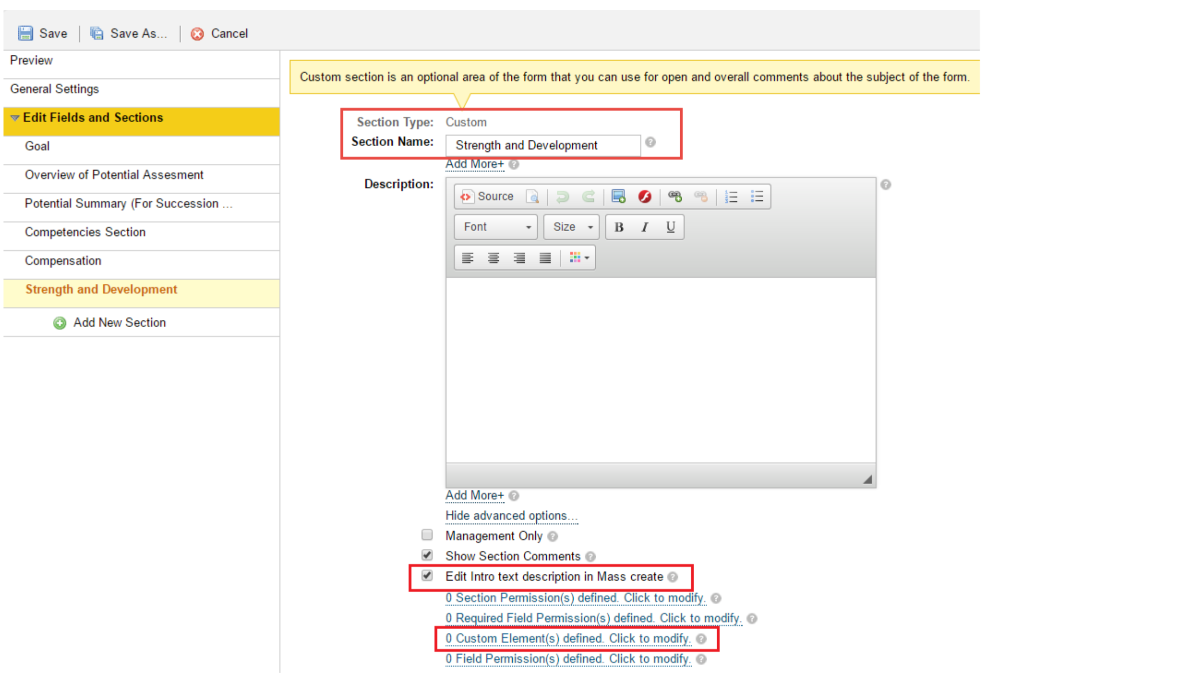
Using Manage Templates, you can configure the Performance Review form such that you will be able to edit the introductory text for custom sections and update the custom elements you define, during the Launch Forms process.

Configuration

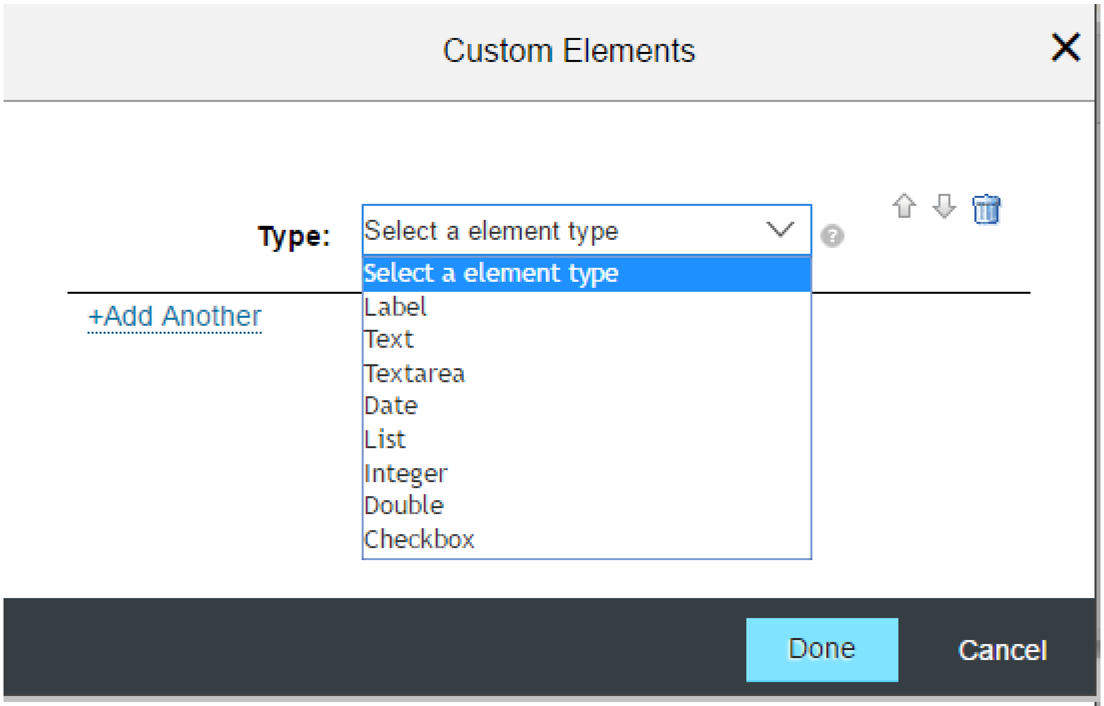
1. Go to *Admin Center* > *Manage Templates*, and select the Performance Review form template you want to configure.
2. Under *Edit Fields and Sections*, seclect a custom field.

> **Note**
>
> To create a new custom section, click *Add New Section*, and select type as *Custom*.

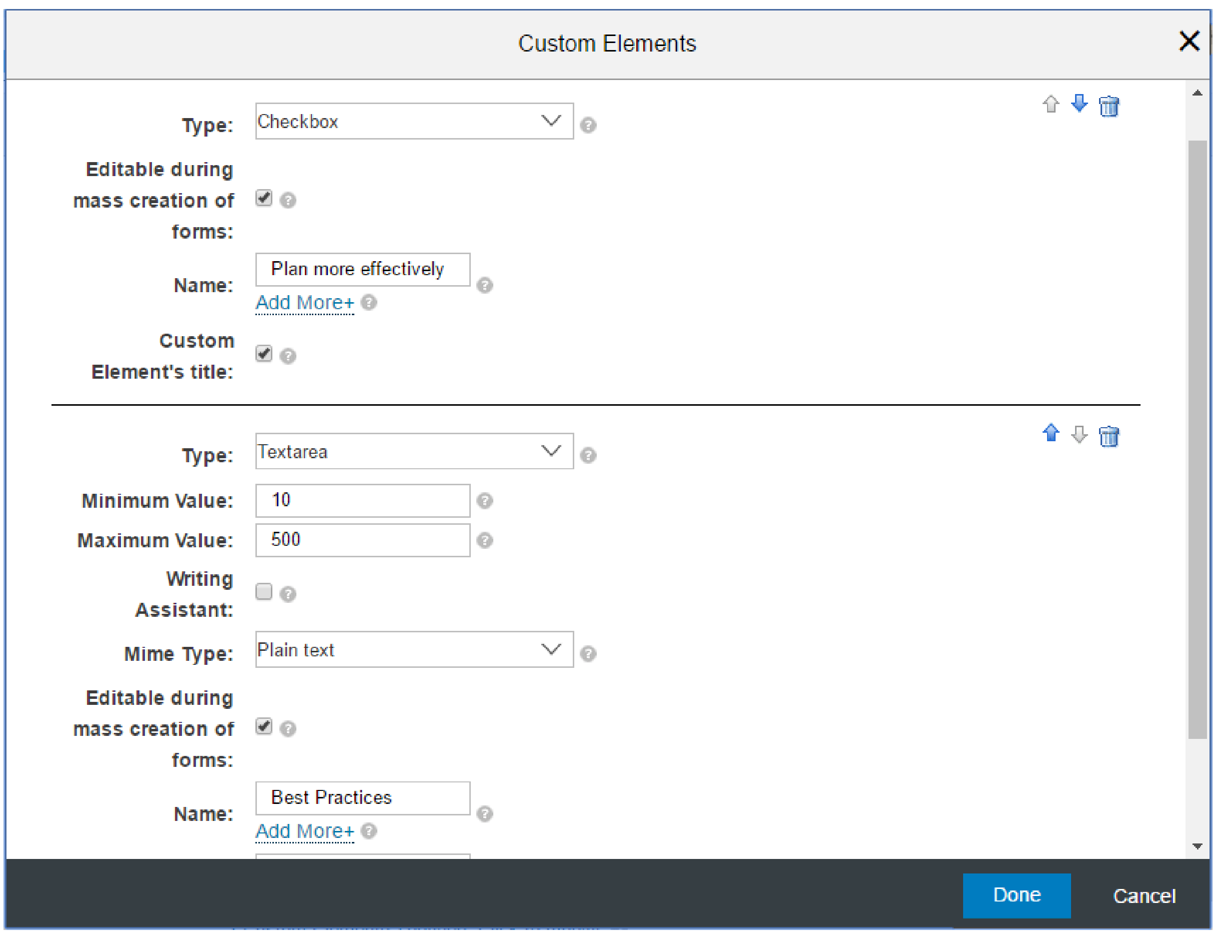
3. On the Custom section page, select *Show advanced options*, and select *Edit Intro text description in Mass create*.



4. Click the link to define Custom Elements. The *Custom Elements* dialog box appears.



5. Click *Add Another*.



6. Add custom elements, define them, select *Editable during mass creation of forms*, and click *Done*.

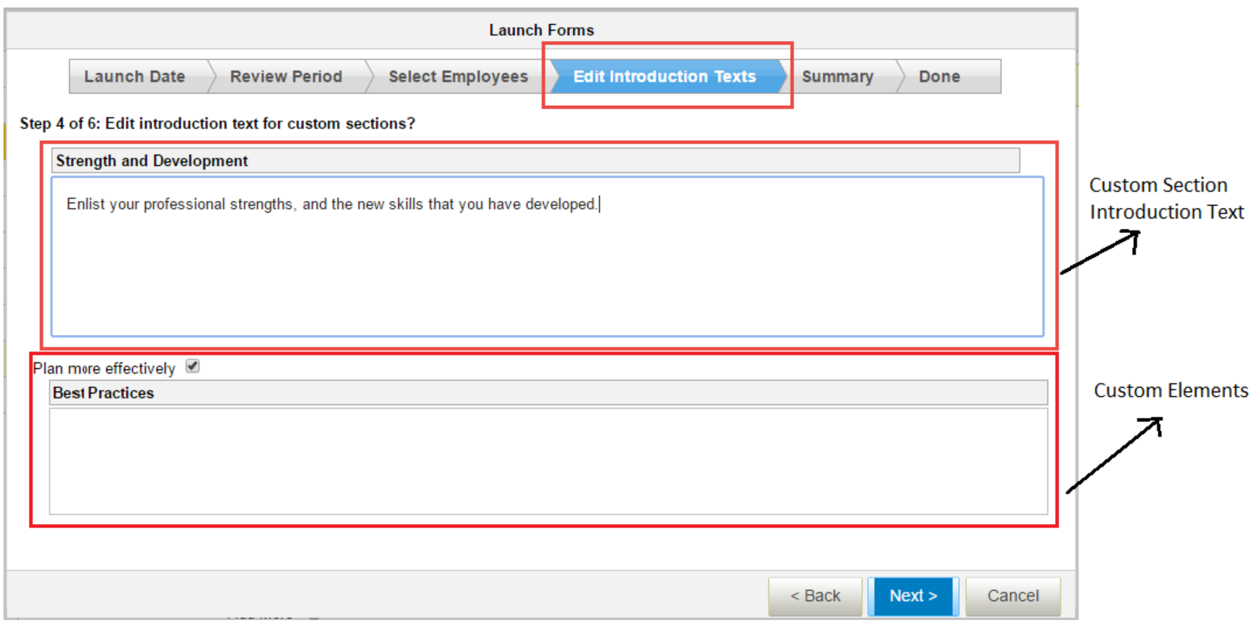
> **Note**
>
> You can add custom section elements of type ‘Text’, ‘Textarea’ and ‘Checkbox’ for editing during mass creation of forms.

7. On the Custom section page, click *Save*.

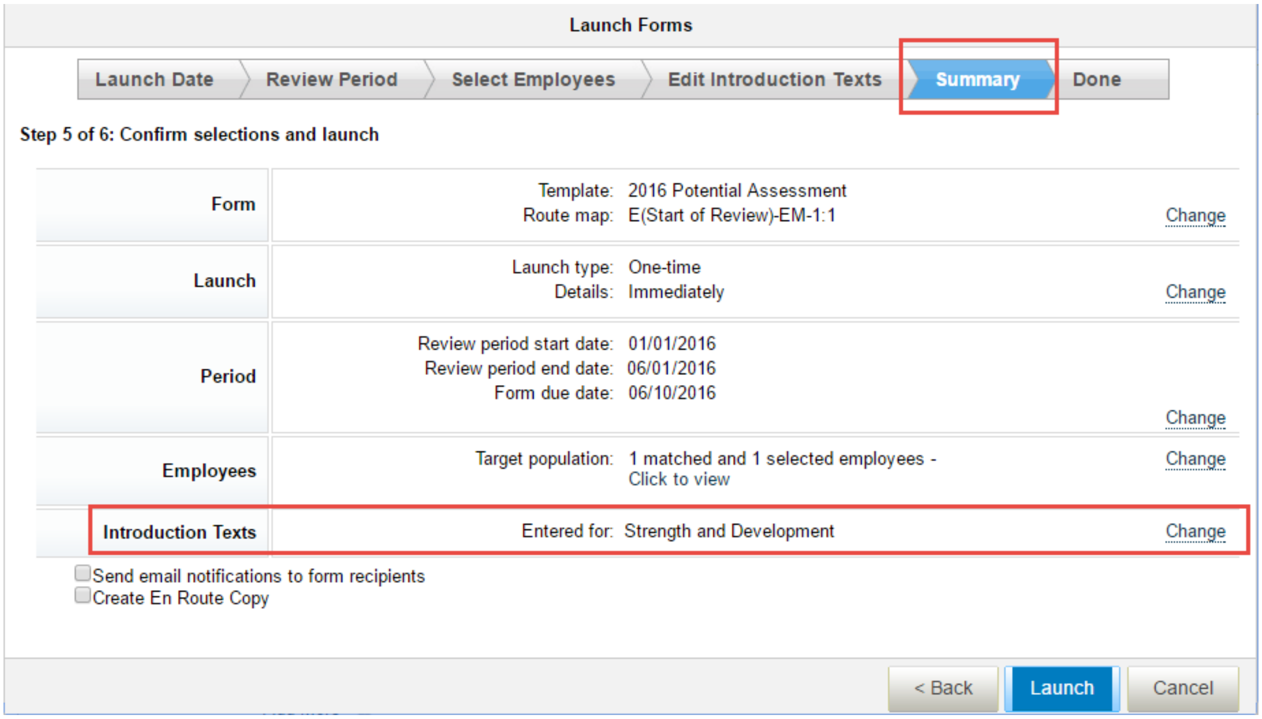
A new step called *Edit Introduction Texts* will appear when you launch form. Also, on the *Summary* step of the Launch Forms process, the custom elements that you add will appear.

Editing Introductory Texts and Custom Elements in Launch Forms Process

When you launch forms, if the *Edit Intro text description in Mass create* option is enabled for a custom section, an additional step, *Edit Introduction Texts* appears. In this step, you can edit the Introduction text of the custom section, and update the custom elements defined for editing, during the Launch Forms process.



A new section also appears in the *Summary* step that enables you to confirm that Introductory texts have been added for the Custom sections.



14.3 Job Summary in Execution Manager

When forms are launched using the later (or) recurring options in the Launch Forms wizard, a job is created in the background. You can monitor the job details in Execution Manager. This will allow you to analyze the job execution details for the forms to be launched.

You can view the *Summary So Far* details of a running *Mass_Create_Form* job from Execution Manager.

The *Summary So Far* information for the *Mass_Create_Form* job includes the following information:

- Number of forms that were successfully launched
- Number of forms that were skipped
- Number of forms that ended with errors
- Total time taken

14.3.1 Viewing Job Summary in Execution Manager

You can view the current status of the forms that are launched and get information about the job execution status in terms of number of forms that are completed, in-process forms, and the forms that have errors, from the Execution Manager.

Prerequisites

- Use *Launch Forms* tool to launch forms
- Execution Manager
  Granting Permission to Access Execution Manager
  To view the Execution Manager dashboard or any of the corresponding admin homepage tiles, you need to be granted permission.
  To grant access to the Execution Manager in role-based permissions, go to *Admin Center* > *Manage Permission Roles* and select the role to which you wish to grant the permission. In the *Administrator Permissions* section, find the *Manage System Properties* tab and select the two checkboxes *Read Execution Manager Events* and *Read Execution Manager Payload*
- Grant the desired Read permission for Execution Manager Events in Role-Based Permissions(RBP)
  The *Read Execution Manager Events* permission enables an administrator to access the main dashboard and view success/fail information. The *Read Execution Manager Payload* permission enables an administrator to view the data involved in a particular job or integrations, including user data, to assist in troubleshooting errors.

Procedure

1. Go to *Admin Center* > *Execution Manager*
2. Click *Summary So Far* icon in the result list for Process Instance Type *Mass_Create_Form* to display job summary.

Results

Job summary displays following details:

- Number of forms processed Successful number of forms processed
- Number of forms with errors
- Total time taken

> **Note**
>
> The process instance type, *Mass_Create_Form*, displays the job summary of the forms that are launched using either *Launch Forms* or *Mass Create Form Instance*.

15 Managing the Performance Form After it is Launched

After you launch the form for an employee or a group of employees, the form will be available in the employees' inbox. At this point employees' can provide their Self-Assessment and Route the form to the next step, which is the Manager Assessment step.

In the Manager Assessment step, Managers will review, assess, and evaluate the content of the form. Also, if you have configured Out of Turn Access feature in your route map, reviewers can access a copy of the form using the *Team Overview* page to provide their ratings before the form officially reaches them.

If you have enabled 1:1 Meeting option in the Modify step of the Route Map. You can click the *Confirm 1:1 Meeting* button to route the form directly to the signature stage or the completion stage, without having to open the form.

Managing Self-Assessment Process for Employees [page 347]
In the Self-Assessment step employees are asked to offer their own assessment on their job performance.

Managing Performance Evaluation Process for Managers [page 350]
In the Manager Assessment step, you can evaluate the performance of the employees and provide ratings based on their performance.

15.1 Managing Self-Assessment Process for Employees

In the Self-Assessment step employees are asked to offer their own assessment on their job performance.

Context

These evaluations also offer employees an opportunity to express themselves and offer managers a different view into the employee's position, goals, and desired responsibilities.

In the Self-Assessment step employees can rate their goals and competencies, and then routes the form to the Manager for Manager's feedback and evaluation.

You can use the *Add Modifier* feature to add a new user to the user defined step of the route map, use the *Get Feedback* feature to send an entire form to someone outside the route map for ratings and comments, and use the *Add Signer* feature to add an additional signee to your form.

Procedure

1. To access your Performance Review form to conduct a self-assessment, select *Performance* from the dropdown navigation menu on the *Home* page.

> **Note**
>
> You can also view all your upcoming tasks listed under the *To Do's* title on the *Home* page. You can click the down arrow next to *Due Now*, to see all your upcoming tasks. Clicking on the task will directly take you to the Performance Review form, where you can provide your Self-Assessment.

2. Within your Inbox, select your applicable form for the Performance Review.

   Your Performance Review form will appear.

   The Dashboard section gives you a quick glance of the Performance Review process. You can drill down for more information in each section.
3. On the *Performance and Goals* section of the form, click the *Edit* icon to update the status of your goal if appropriate.

   The Goals that have been established at the beginning of the fiscal year appear on the form. These Goals are transferred from your goal worksheet.

   > **Note**
   >
   > Only your managers can delete a goal from your worksheet.

4. Scroll through the form to review and rate each of your competencies.

   All applicable competencies that are essential to achieve our goals are displayed on the form. A definition for each competency is displayed.
5. Use the dropdown menu to choose your performance rating for both goals and competencies. Click the *help* icon to view a definition of the rating scale.
6. Use the *Comment* field to provide feedback on goals and behaviors performed for each applicable competency.

   These comments are to support the performance rating that you have provided.
7. You can use the *Add Modifier* feature to add a new user to the user defined step of the route map for evaluating your performance.
   a. Select *Add Modifier* by clicking on the *Actions* button on the Route map section of the form.
   b. On the *Add Modifier* dialog box, the *Search by Filtering* option allows you to define your search by using the following parameters: Employees, Divisions, Departments, Locations, and Groups.

      You can also use the *Search by Name* option to search for a specific user whom you want to add in the user defined step.

      > **Note**
      >
      > Here are some of the limitations that you might come across while using the search functionality in Add Modifier:
      > - The search result returns only top 15 hits for the user you have searched. The search does not sort by relevance so users are unable to locate employees with short last names.
      > - When the user clicks on the ellipses "..." at the end of the search they get redirected to Directory page. To come back to the same page, users must start over again, which means they can never finish the process.

   c. Select the user from the search result and click *Save Changes*.

> **Note**
>
> The user in the user-defined step could send the document forward to the next step without having to send the document back to the user who added them to the route map.

8. You can use the *Get Feedback* feature to send an entire form to someone outside the route map for ratings and comments.
   a. Select *Get Feedback* by clicking on the *Actions* button on the Route map section of the form.
   b. On the *Get Feedback* dialog box, the *Search by Filtering* option allows you to define your search by the following parameters: Employees, Divisions, Departments, Locations, and Groups.

      You can also use the *Search by Name* option to search for a specific user whom you want to send the form for additional *Comments* and *Edits*.

      > **Note**
      >
      > Here are some of the limitations that you might come across while using the search functionality in Get Feedback:
      > - The search result returns only top 15 hits for the user you have searched. The search does not sort by relevance so users are unable to locate employees with short last names.
      > - When the user clicks on the ellipses "..." at the end of the search they get redirected to Directory page. To come back to the same page, users must start over again, which means they can never finish the process.

   c. Select the user from the search result, choose the kind of feedback (Comments or Edits) you would like to receive and click *Send*.
9. Once your self-assessment is complete, scroll down to the bottom of the form and select *Send to Manager* for the Manager's assessment.

Results

You have successfully completed you Self-Assessment and have routed your Performance form for Manager's evaluation.

Task overview: Managing the Performance Form After it is Launched [page 347]

Related Information

Managing Performance Evaluation Process for Managers [page 350]

15.2 Managing Performance Evaluation Process for Managers

In the Manager Assessment step, you can evaluate the performance of the employees and provide ratings based on their performance.

Context

You will receive an email notification from the HR, whenever a Performance form is sent to you for Manager's evaluation.

You will also find an activated link in the *ToDo* section on the *Home* page. There should be one link per team member at each level.

You can use the navigation menu on top of the form to quickly jump to each section of the form.

Procedure

1. To access your Performance Review form to conduct a Manager assessment, select *Performance* from the dropdown navigation menu on the *Home* page.

   > **Note**
   >
   > You can also view all your upcoming tasks listed under the *To Do's* title on the *Home* page. You can click the down arrow next to *Due Now*, to see all your upcoming tasks. Clicking on the task will directly take you to the Performance Review form, where you can evaluate the employees.

2. Within your Inbox, select your applicable form for the Performance Review.

   Your Performance Review form will appear.

   The Dashboard section gives you a quick glance of the Performance Review process. You can drill down for more information in each section.
3. Review Employee's Objectives, Behaviors, Development Plans, ratings, and comments by scrolling through the form or by using the left navigation menu to access each section of the form.

   > **Note**
   >
   > As a manager you can delete a goal from your employee's worksheet.

4. Enter your rating on each objective and competency. You may refer to the job aid in the Introduction section to see the performance rating definition.

   > **Tip**
   >
   > As you work on an evaluation, you may click *Save and Close* at the bottom of the page to complete it at a later time.

5. Enter final comments for each item on the form to be saved with the evaluation.

   Use the *Comment* field to provide your feedback on the goals and behaviors performed for each applicable competency.
6. You can use the *Add Modifier* feature to add a new reviewer to the user defined step of the route map for evaluating the performance of the employee.
   a. Select *Add Modifier* by clicking on the *Actions* button on the Route map section of the form.
   b. On the *Add Modifier* dialog box, the *Search by Filtering* option allows you to define your search by the following parameters: Employees, Divisions, Departments, Locations, and Groups.

      You can also use the *Search by Name* option to search for a specific user whom you want to add in the user defined step.

      > **Note**
      >
      > Here are some of the limitations that you might come across while using the search functionality in Add Modifier:
      > - The search result returns only top 15 hits for the user you have searched. The search does not sort by relevance so users are unable to locate employees with short last names.
      > - When the user clicks on the ellipses "..." at the end of the search they get redirected to Directory page. To come back to the same page, users must start over again, which means they can never finish the process.

   c. Select the user from the search result and click *Save Changes*.

      > **Note**
      >
      > The user in the user-defined step could send the document forward to the next step without having to send the document back to the user who added them to the route map.

7. You can use the *Get Feedback* feature to send an entire form to someone outside the route map for ratings and comments.
   a. Select *Get Feedback* by clicking on the *Actions* button on the Route map section of the form.
   b. On the *Get Feedback* dialog box, the *Search by Filtering* option allows you to define your search by the following parameters: Employees, Divisions, Departments, Locations, and Groups.

      You can also use the *Search by Name* option to search for a specific user whom you want to send the form for additional *Comments* and *Edits*.

      > **Note**
      >
      > Here are some of the limitations that you might come across while using the search functionality in Get Modifier:
      > - The search result returns only top 15 hits for the user you have searched. The search does not sort by relevance so users are unable to locate employees with short last names.
      > - When the user clicks on the ellipses "..." at the end of the search they get redirected to Directory page. To come back to the same page, users must start over again, which means they can never finish the process.

   c. Select the user from the search result, choose the kind of feedback you would like to receive and click *Send*.
8. You can use the *Add Signer* feature to add an additional signee to your form.

a. Select *Add Signer* by clicking on the *Actions* button on the Route map section of the form.
b. On the *Add Signer* dialog box, the *Search by Filtering* option allows you to define your search by the following parameters: Employees, Divisions, Departments, Locations, and Groups.

   You can also use the *Search by Name* option to search for a specific user whom you want to add in the user defined step.

   > **Note**
   >
   > Here are some of the limitations that you might come across while using the search functionality in Add Signer:
   > - The search result returns only top 15 hits for the user you have searched. The search does not sort by relevance so users are unable to locate employees with short last names.
   > - When the user clicks on the ellipses "..." at the end of the search they get redirected to Directory page. To come back to the same page, users must start over again, which means they can never finish the process.

c. Select the user from the search result and click *Save Changes*.

9. If needed, return the form to the employee for changes (before moving the form to the next step). If you want the employee to make changes to the objectives, competencies, or professional development activities on the form, click on *Send to Previous Step* to send the form back to the employee.

   After the employee enters changes, the employee will send the form to you so you can verify the form again.

   > **Note**
   >
   > For a Annual Performance Review form, do not click *Send to Employee for Signature* until you have a discussion with your employee about his or her performance review.

10. Once you have scheduled your *1:1 Meeting* with your Employee you must go back into the form and enter the date the discussion will occur.

    Then after discussion has occurred update the form by clicking the check box.
11. To move the form to Employee Signature, click the *Send Form to Employee for Signature* button at the bottom of the form.

Results

You have successfully evaluated the Performance form of the Employee and have sent the form to the Employee for Signature.

Task overview: Managing the Performance Form After it is Launched [page 347]

Related Information

Managing Self-Assessment Process for Employees [page 347]

16 Managing Forms Using Admin Center

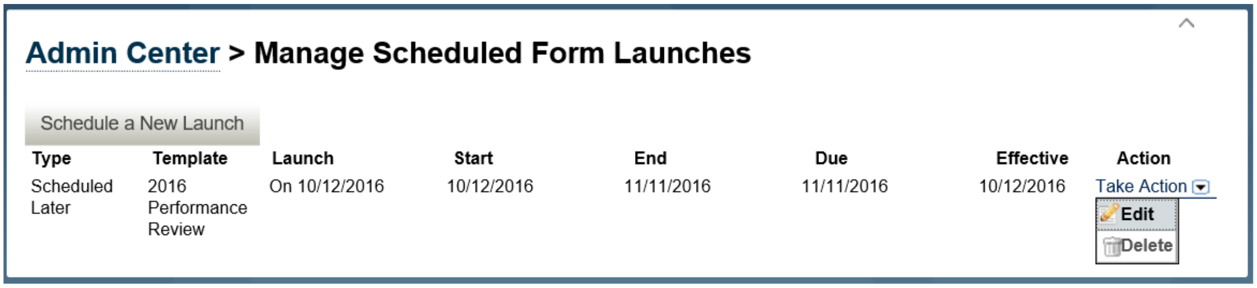
You can manage the Performance Management form after it is launched from Admin Center.

The below list of Admin Features are used to manage the Performance Management form.

You can restore a previously deleted form at any time. The form is restored to the system at the routing step it was in, when it was deleted.

16.1 Manage Scheduled Reviews

You can use this page to cancel or modify the launch of a form.

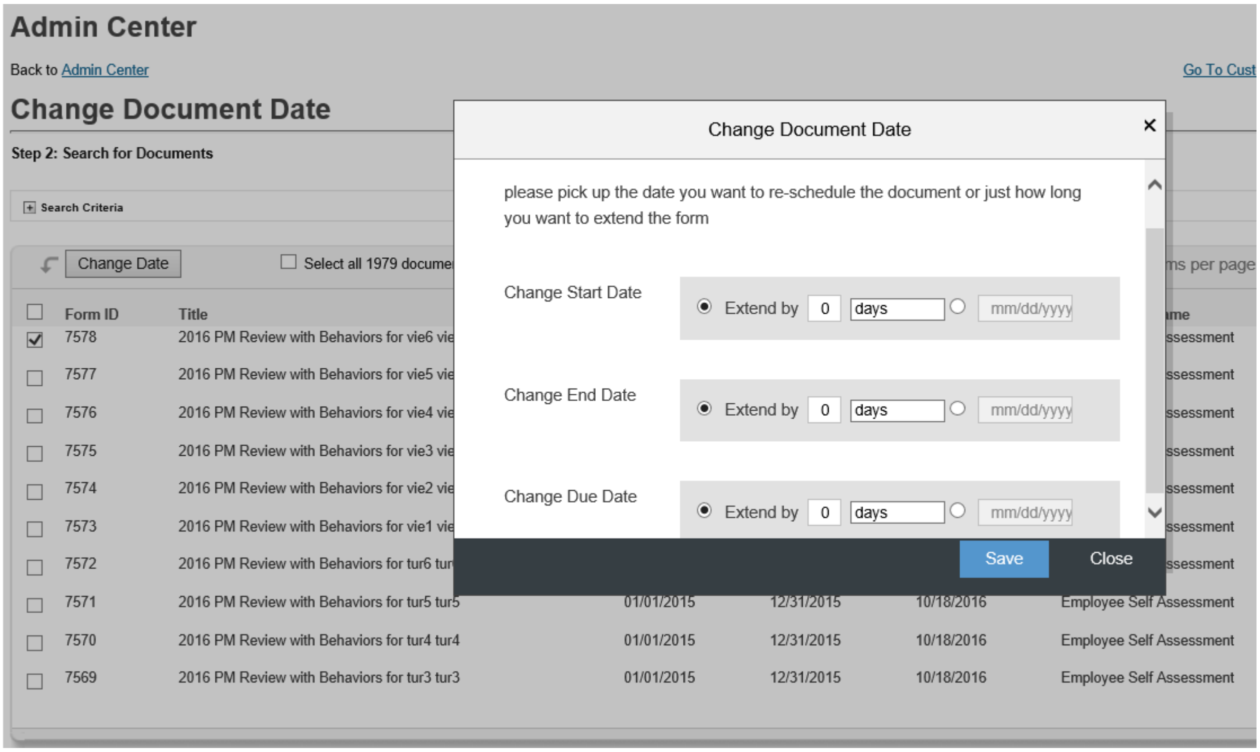


From the *Manage Scheduled Form Launches* page you can do the following:

- Schedule a new launch for any Performance Management or 360 review form, by clicking *Schedule a New Launch* tab.
  Refer Launching Forms [page 337], for the steps to schedule a new launch for the forms that you have created for a performance review or a 360 review process.
- Modify the launch schedule by selecting *Edit* from the dropdown menu under *Take Action*. You can review the sections and make any required changes on the *Summary* page.
- Cancel the launch schedule by selecting *delete* under *Take Action*.

16.2 Change Form Date

You can use this page to change the start, end, or due dates of a form.



1. You can use the new search page to perform a basic search to locate the form that you intend to modify.
2. Once you locate, select the form and click *Change Date*.
3. On the *Change Document Date* dialog box, pick up the date in dd/mm/yy format to re-schedule the form or just enter the number of days you want the start date, end date or the due date to be extended to.
4. Click *Save*.

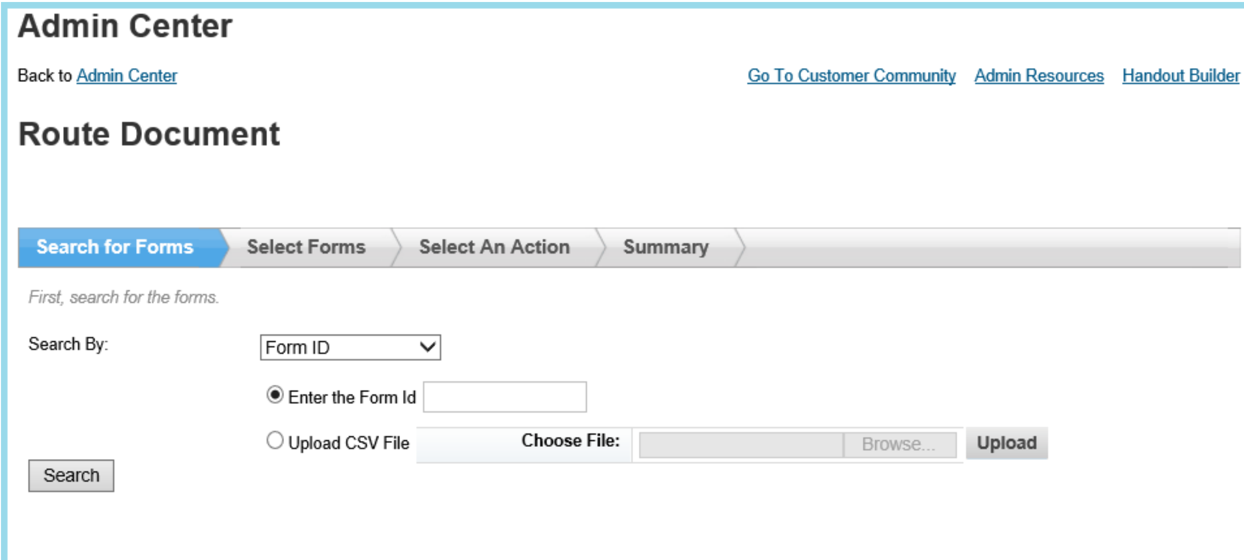
16.3 Route Forms

The form search page allows you to locate forms in order to move them.

You can use the new search page to perform a basic search using just the employee's name and the folder you want to look in, or you can use the advanced search and select the employee or form criteria on which you want to search on. The new search page is available for Delete Documents, Restore Deleted Documents, and Change Document Dates.

> **Note**
>
> If you search by selecting *Subject User*, *Form ID* or *Form Template* in the *Search By* field: you are prompted to search by the employee name, input a Form ID, or select a Template for search. This allows you to use more

relevant and specific search criteria to search for forms within the *Route Forms* and *Modify Form Route Map* tools.



> **Note**
>
> You can route forms to employees with inactive assignments within the Route Map and any future steps involving those employees will appear in the Route Map. Also, the full name of these employees, now appears on the relevant steps of the Route map.

16.4 More on Forms

New Hire Option

The schedule mass form create feature allows the admin to schedule creation of the new hire forms on the first day for the new hire, or at a given number of days after the first day.

Mass Update of Forms

You now have an option to quickly update the form template when new goals have been added after forms were launched. Updating the form pulls in any newly created goals so they will show up on individual forms and on goal reports. Previously, you needed to manually open each individual form to get the form updated. Now, Admins can manage the process at the template level. Admins can go to *Admin Center* > *Form Template Administration* > *Form Templates* > `<Specific Template>` > *Open & Save Document*. In the window that opens, enter the start and end dates for the forms based upon that template that should be updated. The system will open and save the form template, which automatically updates the template with any new content, such as goals. Now all forms within the specified date range will be automatically updated.

Remove Visibility to Form Instance from User

You now have the option to hide forms from individual employees without deleting the form from the system. You might want to do this if employee relationships changed during a review event and by the end of the review cycle, some employees no longer needed access to the form. To hide the form from those employees only, first make sure you have administrative permission to do so. To grant permission, go to *Admin Center* > *Manage Security* > *Administrative Privileges* and select the Manage Document Visibility check box. Then to hide a form, go to *Admin Tools* > *Manage Documents* > *Manage Document Visibility* and select the form you want to delete either by searching for it by users or by the Document ID. This feature works with performance review forms and 360 Multirater forms.

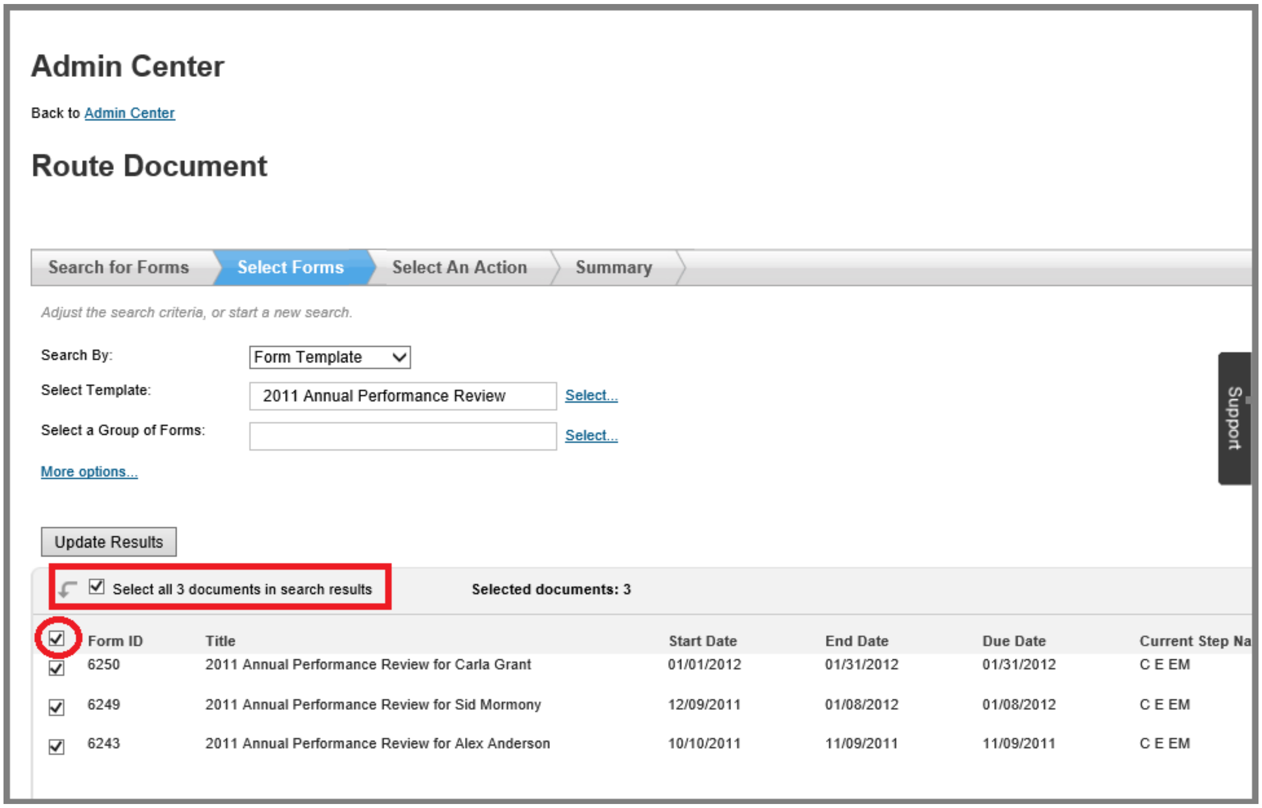
16.5 Multi-selection of forms in Route Forms

Route forms tool is enhanced to support multi-selection of forms.

Context

In this release this feature has been enhanced to allow multi-selection of forms belonging to the template. Selection of "Group of forms" in the search criteria is not needed for multi-selection.

You can now select multiple forms by selecting *Form ID* or *Select all <n> documents in search results*.



Also, for multi-selected forms, you can now perform the following routing actions:

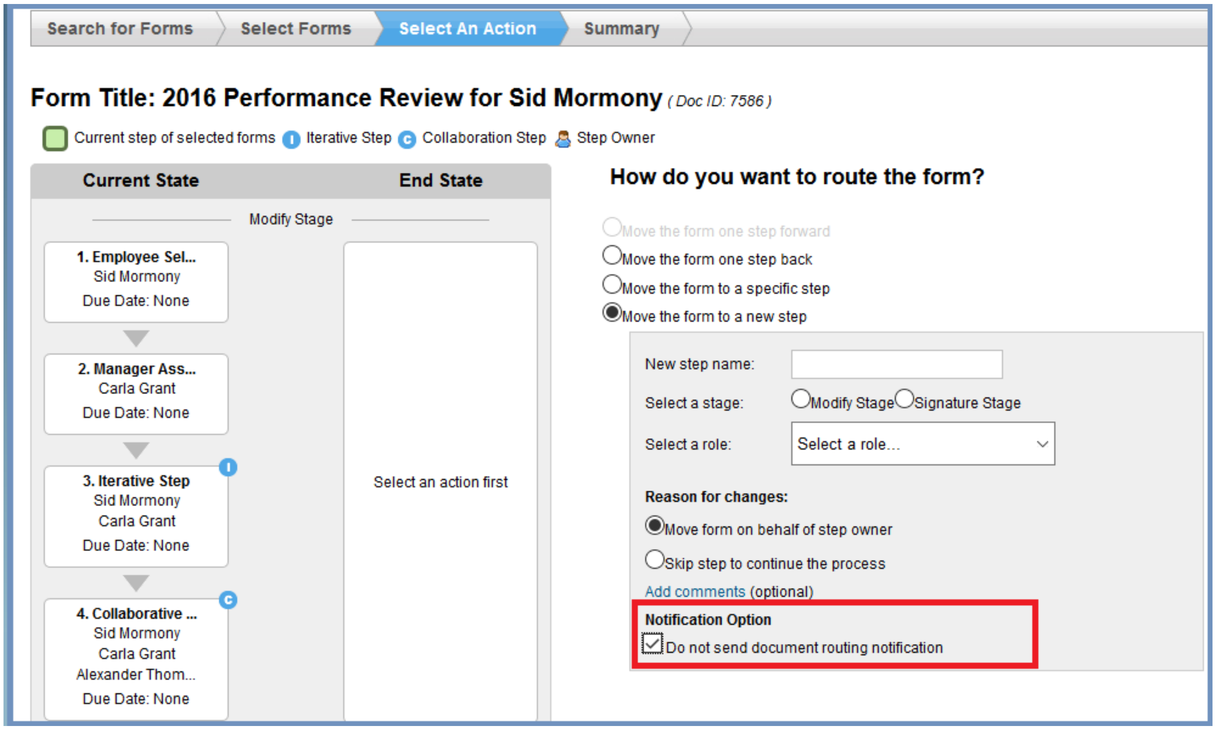
- Move forms one step forward
- Move forms one step backward
- Mass move forms to completion

Procedure

1. To mass move forms to completion, select *FormTemplate* in the *Search By* field, from the Route Document page.
2. Click *Select* to choose the Form Template.

   The *Select Template* dialog box opens.
3. Select the Form Template by clicking on the radio button, and click *Done*.
4. Click *Search* to list out all the forms which you want to route, on the Route Document page.
5. Select *Form ID* checkbox, to select all the forms from the current page and click *Next*.

   > **Note**
   >
   > To select all the forms from across the pages, select *Select all <n> documents in search results*.
6. Select *Move the form to completion* to mass move forms to completion.



> **Note**
>
> You can now prevent sending *Document Routing Notification* and *Document Completed Notification* to the users, before performing any routing actions by enabling *Do not send document routing notification* option.

7. Select the appropriate option under *Reason for changes*, and click *Next*.

Results

The confirmation message appears: **You have successfully routed the forms**.

16.6 Mass Routing of Forms Using CSV Upload

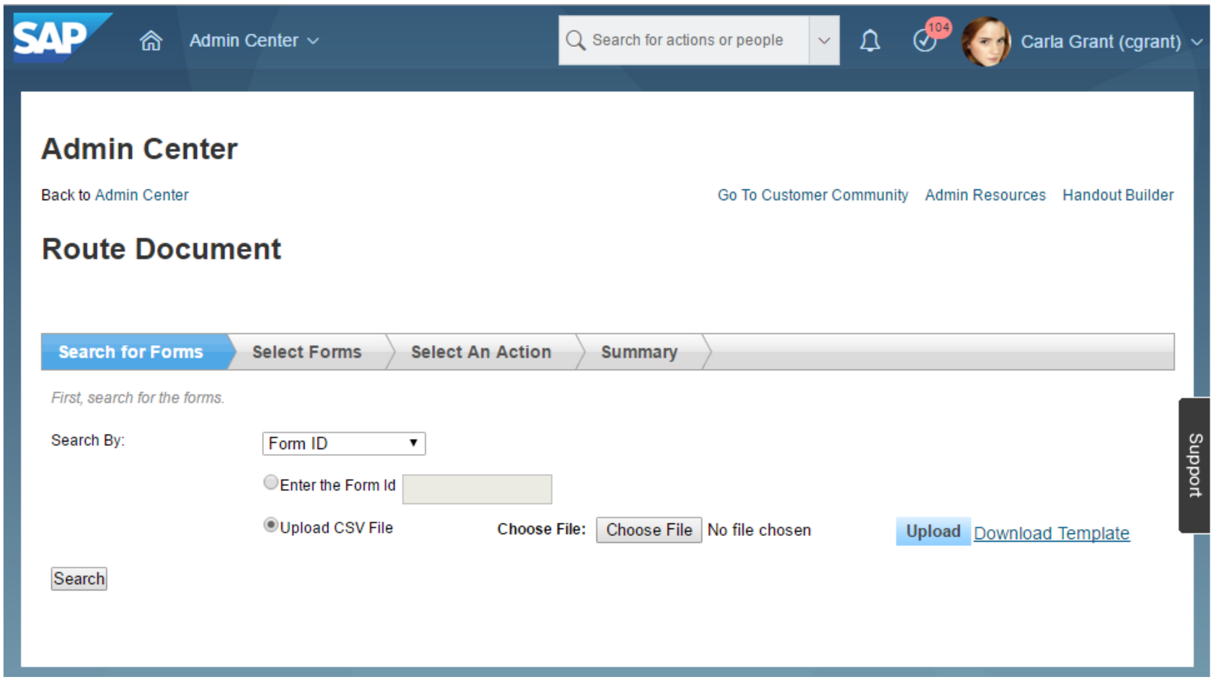
You can mass route Performance Review forms by uploading a CSV file via Admin Center

Context

Routing forms using CSV upload enables you to route multiple forms, based only on form ID, irrespective of whether the forms are part of different group(s) or individual forms.

Procedure

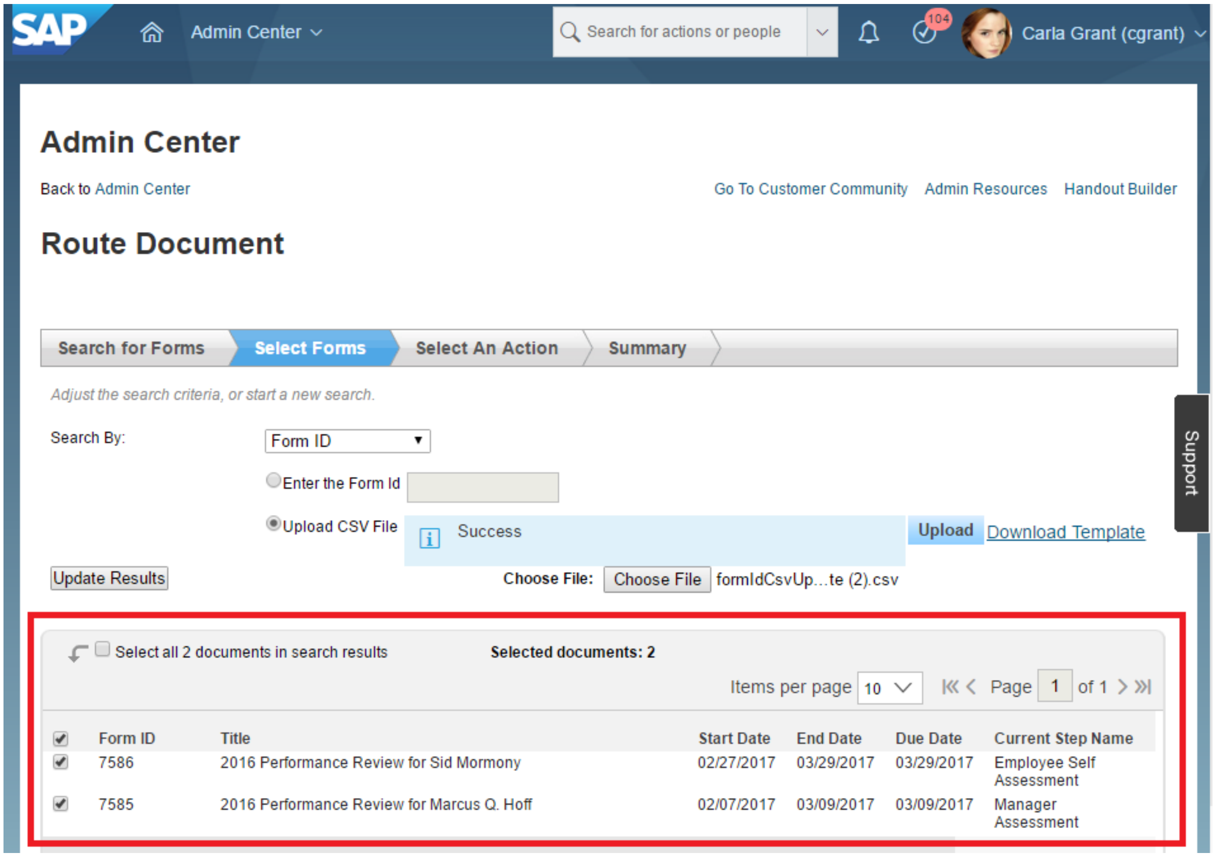
1. Go to *Admin Center*.
2. In the *Tools Search* field, search for *Route Form*. The *Route Document* page appears.



3. Under the *Search for Forms* tab, search by *Form ID*, and select *Upload CSV* file.
4. Click *Choose File* and select the CSV file that contains the list form IDs to be routed.

> **Note**
>
> The CSV file is a simple, single-coulmn file. The column contains the IDs of all the forms you want to route. Also, a Form ID Header has been added to the template of the .csv file to improve readability.

5. Click *Upload*. The records corresponding to the uploaded form IDs appear.
6. Under the *Select Forms*, select the forms you want to route, and click *Next*. The *Select An Action* tab appears.



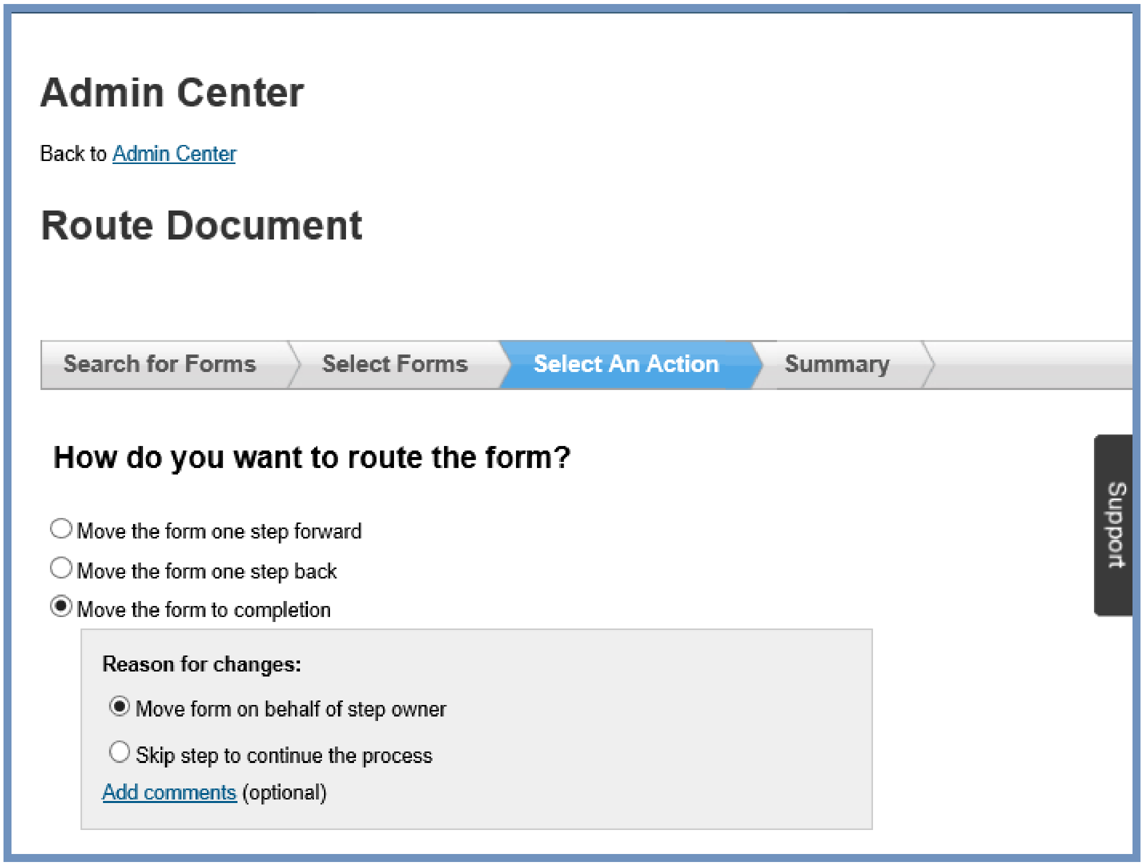
7. Select the appropriate action under *How do you want to route the form?* and click *Next*.

Results

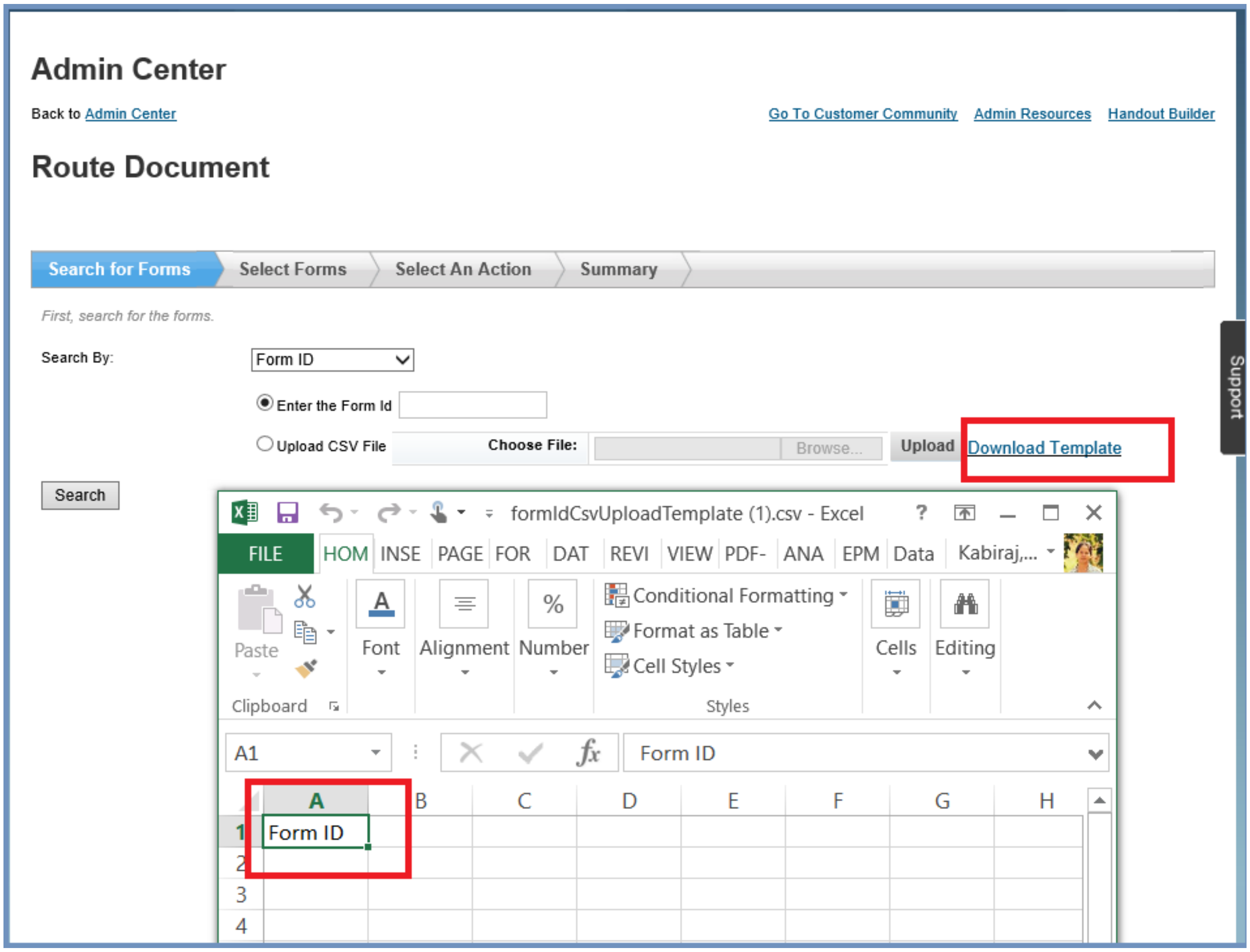
You have successfully routed the forms.

16.7 Move Forms to Completion via .csv

The .csv feature in Route Forms tool has been enhanced to support mass move forms to completion and download a form template.



You can now download a form template by clicking on the *Download Template* link. Also, a **Form ID** Header has been added to the template of the .csv file to improve readability.



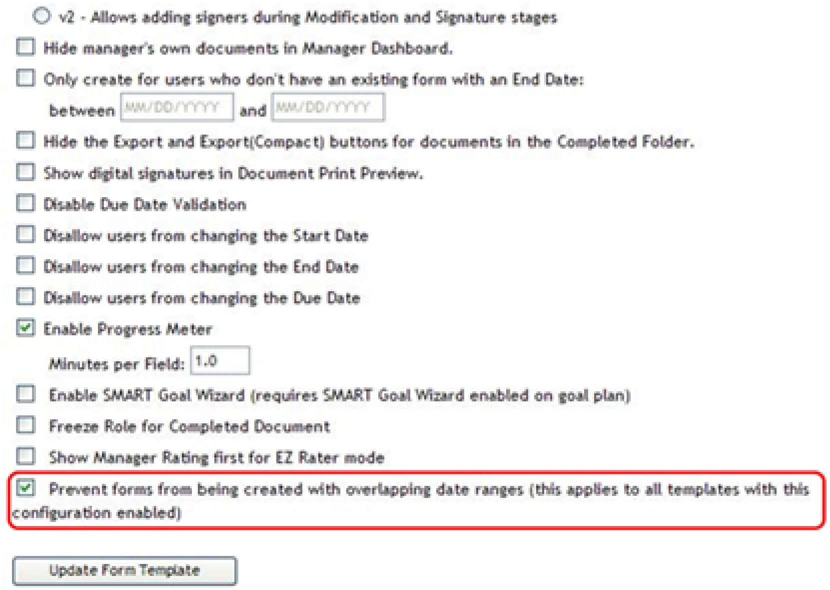
Related Information

[Multi-selection of forms in Route Forms [page 357]]

16.8 Prevent Form Date Overlap

If a form start and end dates are being used by Variable Pay to determine bonus plan eligibility periods, form dates cannot be overlapping. In order to prevent this, you can set up the prevent per form template.

Admin Center > *Form templates*



16.9 Configuring Custom Print

The custom print layout allows customers to customize the layout of a performance form when printed. This feature is available in a limited number of cases.

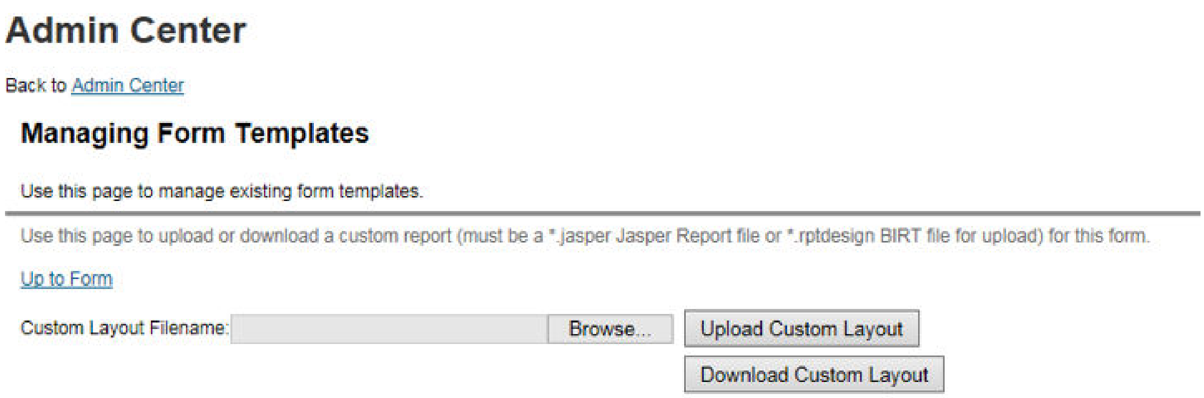
Context

You configure custom print in *Form Template Settings*:

Procedure

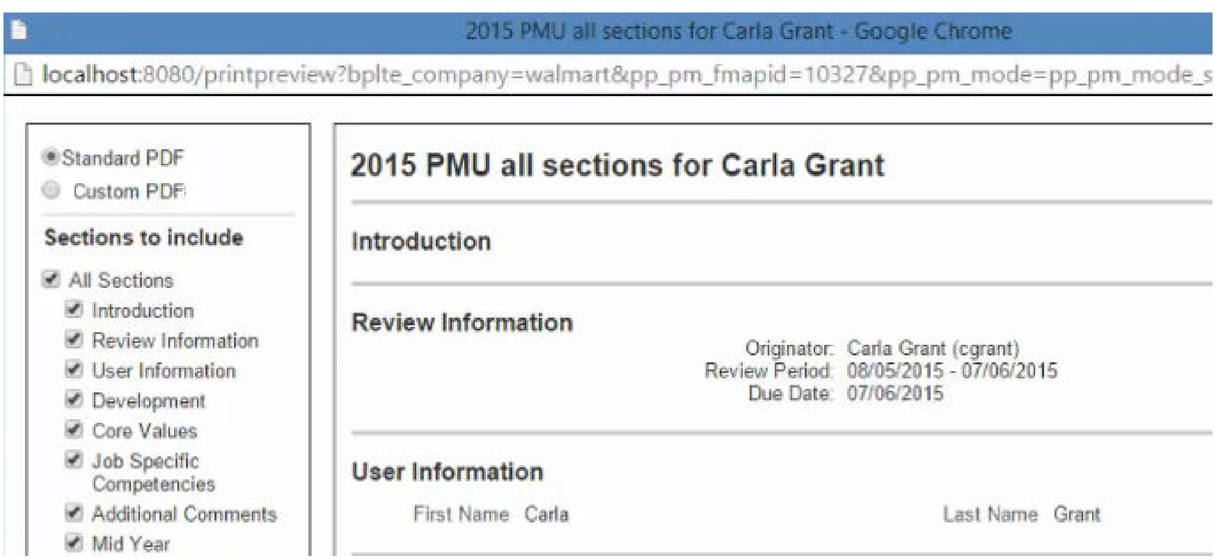
1. Select *Enable Custom Layout Printing*.
2. Click the *Manage Custom Layout* button.

3. In the next screen, browse to locate the *Custom Layout Filename*, which is the BIRT file.
4. Click *Upload Custom Layout.*



> **Note**
>
> The BIRT publisher does not respect step, field, and section-based permissions configured in the form template.

The finalized form is shown below. The user can select the *Standard PDF* or *Custom PDF* option.



16.10 Managing Document Visibility

You can hide a form from the user's form list as well as from the team overview page in Performance Management v12 Acceleration.

Procedure

1. To manage document visibility, go to *Admin Center* > *Manage Document Visibility.*.
2. From the *Manage Document Visibility* page do one of the following:
   - Remove document visibility for a selected user or remove visibility of a specific document
   - You can use the CSV file Upload functionality in *Manage Document Visibility* tool to restrict document visisbility for users using their "User Id". The CSV file Upload functionality helps you to remove the visibility of the form from the users, who are no longer required to be included in the route map of the form.
   - Restore visibility of a specific document for a selected user

16.11 Form Tab Configuration and Visibility Control

Provides a configuration option that allows you to control the visibility of item tabs (competencies, goals) on a Performance form. The enhancement hides the tab-related information on the PDF output as well.

Implemented for Performance Management v12 Acceleration, this feature lets you control the tabs that are displayed in each section for a given user role and step ID.

The enhancement is applicable for Objective, Competency, and Development sections and includes following tabs - goal details, other details, learning activities, ratings from others (earlier called 'others rating'), last review rating. You can control display of these tabs at the form level too using the same permissions in fm-meta section. Tab permissions applied on the form reflect in PDF output as well. Below are the sections with the respective tabs applicable.

- **Objective Section** - Objective detail, other detail, ratings from others, Achievements
- **Competency section** - ratings from others, last review rating
- **Development section** - objective detail, other detail, ratings from others, Learning Activity, Achievements

Overview

The tab-permission element is a new optional sub-element added to objective-sect, competency-sect and fm-meta. This element can be used in fm-meta to control all sections' tabs. It can be defined in the section element if you want to control tabs of a specific section. By default, all tabs are enabled in all sections.

- Supports only for Performance Management V12 Acceleration forms.

- Backward compatibility for existing configuration using 'others-ratingtab-permission' is supported only when 'others-ratingtab-permission' is not already configured.

Configuration

The tab-permission element is an optional sub-element of a competency-sect, objective-sect and fm-meta.

> **Note**
>
> Tab permissions defined in the fm-meta are applied across all sections for the entire form. Tab permissions can be defined at a section level by adding the desired permissions to each section.

Type of Access (type attribute)

- enabled – user can see the tab
- none – user can't see the tab

Configuration is allowed for: learning-activities | others-rating | last-review-rating | goal-details | other-details | achievements

- Learning Activities: Only applicable to development goal sections
- Other Ratings: Applicable to performance goal, development goal, and competency sections
- Last Review Rating: Only applicable to competency sections
- Goal Details: Applicable to performance goal and development goal sections
- Other Details: Applicable to performance goal and development goal sections

XML Configuration

Permission type – none/enabled

```
<tab-permission type="none">
<role-name>*</role-name>
<tab refid="last-review-rating"/>
<tab refid="goal-details"/>
<tab refid="other-details"/>
<tab refid="others-rating"/>
<tab refid="learning-activities"/>
<tab refid="achievements"/>
<route-step stepid="*"/>
</tab-permission>
```

16.12 Using Document Transfer Options

This section describes how to use Do Not Transfer Document , Automatic Inbox Document Transfer To New Manager, Automatic En Route Document Transfer To New Manager, and Automatic Completed Document Copy to New Manager.

The transfer options do not manage the full workflow of the form. It controls the form in the current step if it meets certain rules. For example, *Inbox Manager Transfer* only applies to manager roles, and only takes effect if the form is in the Inbox of that manager at the time of the import. Otherwise it has no effect at all. Likewise *Do Not Transfer* is not a feature to control all future manager steps, but to prevent the form from moving at the time of import (it allows current stakeholder to complete it and then move it on).

Trigger Events for Document Transfers

There are a number of areas in the product that can trigger a document transfer:

- A manual change is executed via *Admin Center* > *Manage Users* > *Documents Transfer*.
- Automated FTP employee file import. With this option your transfer options are configured at the time the FTP process was setup and will not change until requested.
- Manual employee file import. With this option, since it is possible for the user to use different settings on every import, differing results may occur.
- Company Change Engine: In addition to the standard manager changes that can trigger document transfers, the employee change engine can also be configured to execute a documents transfer on other triggers such as: Jobcode Change and Location Change.

Do Not Transfer Document

Setting this option disables all the options nested under this option. It means forms will not get transfered when the manager changes regardless of any other settings you have elsewhere.

> **Note**
>
> This is for current step only. Future steps will still show the new manager.

> **Caution**
>
> Problems can occur if you use this option and fail to set template level permissions on the form appropriately. If you change the person's real manager in your user imports, but use this setting to keep the document with the old manager, then remember the old manager is no longer the official EM role. Therefore none of the EM permissions you set the form up with will apply to the old manager. They will not be able to perform any actions that was restricted to EM. You should only enable this option when there are no longer any EM actions left to complete in the workflow.

Automatic insertion of new manager as next document recipient if not already

Select this option to make the new manager a part of the review process and remove the old manager from accountability going forward. When you use this option, if the new manager is not the next person to receive the form, the next person to receive the form is the employee or the HR person then this option explicitly tells the system to insert the new manager into the process at a point that the manager was not otherwise going to be.

> **Note**
>
> - Do not enable this option unless this needs to be an official part of your workflow.
> - The old manager will retain a 'copy' of the form once it is moved to the new manager.
> - The old manager's form will not get updated with any new information.
> - This does not apply to other manager roles.
> - If the new manager was already going to be the next step, then this has no affect.
> - Not recommended especially later in the year when it doesn't make sense for a new manager to be inserted into the workflow, for example when forms are in signature step. This might not be desirable if the new manager has had no insight into the history of this form.
> - This is inserting an unplanned step (Alternate Route User Step) into your route map. This unplanned step might introduce a security hole and make certain data visible.

Automatic Inbox Document Transfer To New Manager

Move documents from the old manager's Inbox to the new manager's Inbox.

- This transfers the live in-progress document out of the old manager's hands into the new manager's..
- The old manager will retain a 'copy' of the form.
- The old manager's form will not get updated with any new information.
- This does not apply to other manager roles.
- If the form is NOT in the inbox of the current (or old) manager at the time of transfer, then this setting has no affect. It will remain with whoever had the form. it's only purpose is to move a form with the manager to the new manager, not transfer it out of the hands of any other person.

Automatic En Route Document Transfer To New Manager

Move documents from the old manager's En Route folder to the new manager's En Route folder.

- The old manager will retain a 'copy' of the form.
- The old manager's form will not get updated with any new information.
- This does not apply to other manager roles.
- If the form is NOT in the enroute folder of the current (or old) manager, then this setting has no affect.

  > **Tip**
  >
  > This option is recommended for transferring 360 forms.

Automatic Completed Document Copy to New Manager

Move all completed documents about the employee to the new manager's Completed folder.

- This sends a copy of the completed document to the new manager.
- The old manager will retain the original completed version.
- This does not apply to other manager roles.
- If the form is NOT in the enroute folder of the current (or old) manager, then this setting has no affect.

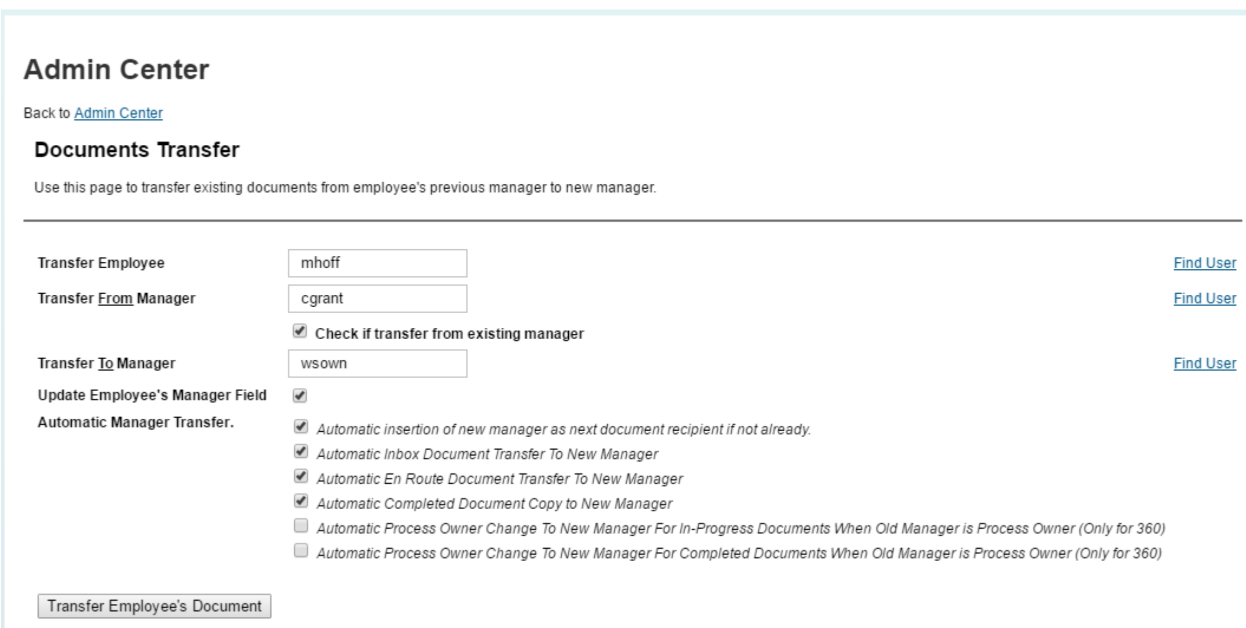
> **Tip**
>
> This option is recommended for transferring 360 forms.

16.13 Transfer Forms to New Manager

The Documents Manager tool enables you to manually transfer in-progress, en-route and completed forms to the new manager, after an employee's manager changes.

Configuration

To enable the Documents Manager tool in your application, go to *Admin Center* > *Manage Permission Roles* > *<Permission Role>* > *Permission* > *Administrator Permissions* > *Manage User*, and select *Documents Transfer*. The Documents Transfer tool is now available in your instance, and to access it go to: *Admin Center* > > *Transfer Forms to New Manager*. The Documents Transfer page appears.



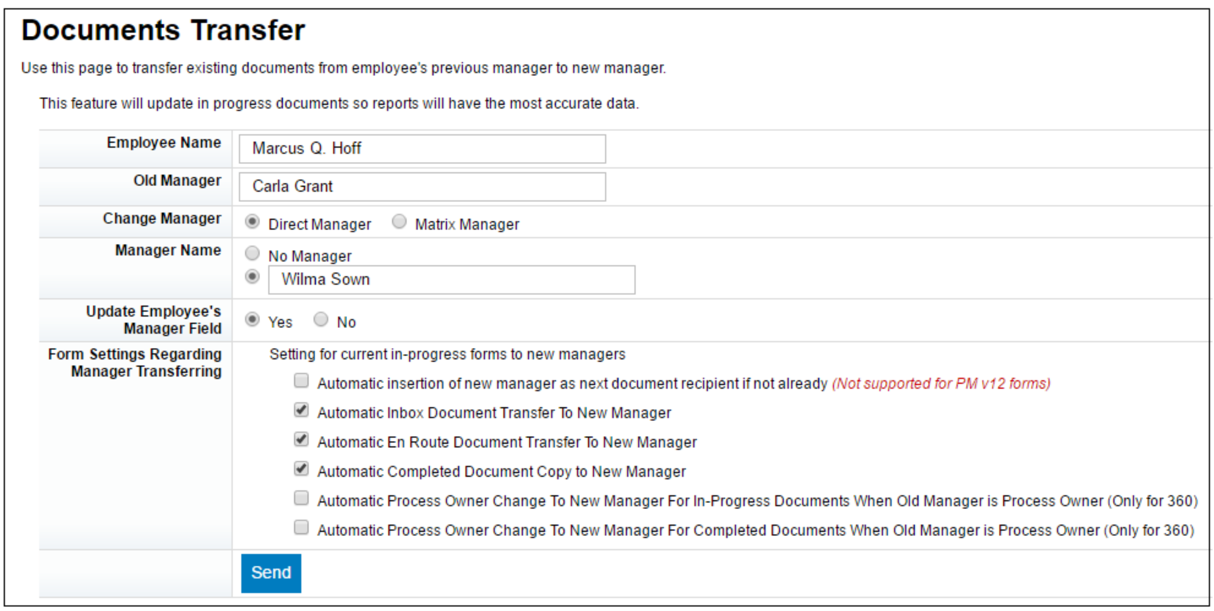
You can also use the Documents Transfer tool for transferring forms, when the Matrix Manager of an employee changes. To enable it, go to *Admin Center* > *Cross Talent Feature Settings*, select *Enable Matrix Manager Document Transfer Support*, and click *Save*.

Using the Documents Transfer tool

The Documents Transfer tool allows you to transfer the forms of one employee at a time. You can transfer the forms of an employee to the new manager as follows:

1. Enter the *Employee Name* whose forms need to be transferred. The *Old Manager* appears automatically; if not then enter the employee's old manager's name.
2. Select the role for which the manager is changing - in the *Change Manager* field, select either *Direct Manager* or *Matrix Manager*.
3. Enter the new manager's name in *Manager Name*, and to update it in the employee's Manager field, select *Yes*, else, select *No*.
4. In the *Form Settings Regarding Manager Transferring* section, select the appropriate options for documents transfer, and click *Send*.

> **Note**
>
> You cannot transfer documents to the new manager until the new manager's logon credentials are ready (mostly, in case of new hire), and the manager has been included in the default permission groups.



A confirmation that the documents have been successfully transferred appears, and the document transfers for the employee's manager change is complete.

16.14 Deleting a Form

Deleting a form removes it from the system. However, you can always restore it later.

Context

You can delete forms individually, or bulk-delete multiple forms at once.

> **Note**
>
> The *Form ID* checkbox on the Delete Document table header allows you to select all the forms listed in the table. But there are scenarios where you must randomly select forms from this table for mass deletion. Selecting these forms individually, when the number of forms are more, is a tedious process. To overcome this, you can use the "CSV file Upload" functionality to upload randomly selected forms for mass deletion.

To delete forms individually:

Procedure

1. Go to *Admin Center*, in the *Tools Search* field, enter *Delete Forms*.

   The *Delete Document* page opens.
2. Select *Employee Document Folder* or *Advanced Search*, enter the relevant information and click *Search*.

   The search options also allow you to define by various parameters to delete documents in bulk.

   The form or the forms that you want to delete appears on the *Delete Document* page.

   > **Note**
   >
   > *Employee Document Folder* is used to view the contents of a specific user's inbox, en route folder, or completed folder.

   > **Note**
   >
   > *Advanced Search* is used to find documents based on one or more of the search criteria that appears in this section. Document retrieved will meet all criteria specified.
3. **To delete forms individually**: Select the checkbox on the left of the form and click *Delete*.
4. **To bulk-delete multiple forms**: You can select multiple forms by selecting *Form ID* or select the forms individually and click *Delete*.
5. Click *Yes* to confirm that you want to delete the selected form or the forms.

Results

The forms are removed from the system and you'll see a confirmation message at the top of the page.

16.15 Restoring a Deleted Form

You can restore a previously deleted form at any time. The form is restored to the system at the routing step it was in, when it was deleted.

Prerequisites

- To grant permission for restoring documents that was previously deleted, enable *Admin Center* > *Manage Permission Roles* > *[Permission Role]* > *Permissions* > *Administrator Permission* > *Manage Documents* > *Restore Deleted Documents*.

Procedure

1. Go to *Admin Center*, in the *Tools Search* field, enter *Restore Delete Forms*.
   The *Restore Deleted Document* page opens.
2. Select *Employee Document Folder* or *Advanced Search*, enter the relevant information and click *Search*.

   The search options also allow you to define by various parameters to restore deleted documents in bulk.

   The form or the forms that you want to restore appears on the *Delete Document* page.

   > Note
   >
   > *Employee Document Folder* is used to view the contents of a specific user's inbox, en route folder, or completed folder.

   > Note
   >
   > *Advanced Search* is used to find documents based on one or more of the search criteria that appears in this section. Document retrieved will meet all criteria specified.
3. **To restore forms individually**: Select the checkbox on the left of the form and click *Restore*.
4. **To bulk-delete multiple forms**: You can select multiple forms by selecting *Form ID* or select the forms individually and click *Restore*.
5. Click *Yes* to confirm that you want to restore the selected forms or form.

Results

The forms are restored back into the system and you'll see a confirmation message at the top of the page.

17 Integration with Continuous Performance Management

Enables you to view your Continuous Performance Management Achievements which are linked to your Performance Goals and Development Goals, directly on your Performance Review form. These Continuous Performance Management Achievements can be viewed under Achievements tab in the Performance Goal and Development Goal section.

Continuous Performance Management data can be pulled into Performance forms so that it can be used as supplemental information during the Performance Review cycle.

The following are the prerequisites to use Continuous Performance Management and Performance Management integration:

- Performance Management v12 Acceleration
- Continuous Performance Management
- Product edition: Enterprise or SPRAC

> **Remember**
>
> As a customer, you do not have access to Provisioning. To complete tasks in Provisioning, contact SAP Cloud Support.

Configuration

- **Enabling View Achievements permission**
  The role-based permissions, which you enable for using Continuous Performance Management, are applicable to you and to your direct reports. However, with this integration, more user roles can have access to you Performance Review form. If you want those users to view your Achievements data as well, you must enable the following role-based permission for the target population, they belong to:
  Go to *Admin Center* > *Manage Permission Roles* > *Permission* > *Continuous Performance Management*, and under *Achievement*, select *View*.
- **Configuring Achievements tab**
  Next, you need to configure the *Achievements* tab for both the Performance goal section and the Development goal section on the Performance Review form.
  The *Achievements* tab for each section type (Performance Goals and Development Goals) can be enabled from *Admin Center* > *Form Template Settings* > *Enable Achievements tab in Performance Goal Section* and *Enable Achievements tab in Development Goal Section*.

  > **Note**
  >
  > By default, the Achievements tab is enabled and will be visible to all users. However, the tab and it's data are permission based. Only users with permissions to view Continuous Performance Management data will be able to view the Continuous Performance Management Achievements data.

- **Displaying Achievements on the Performance Management Form under the Achievements tab**

  > **Remember**
  >
  > For the achievements to appear on the Performance form, make sure that the achievements are dated within the timeframe that the form is launched.

  For example, if the achievement date is set to August 15, but the form start and end date are November 20 and December 10, respectively, then the Achievements will not be displayed under the *Achievements* tab on the Performance form. This is because the Achievement date does not fall within this timeframe.
  If you are not able to view your Achievements on the Performance Management Form under the Achievements tab, you can check the form start and end date in Provisioning.

  > **Remember**
  >
  > As a customer, you do not have access to Provisioning. To complete tasks in Provisioning, contact SAP Cloud Support.

  Sample Code

  ```
  <meta-create-date>09/01/2017</meta-create-date>
  <meta-completion-date>09/01/2017</meta-completion-date>
  <meta-lastmodified>9/1/17 9:03 AM</meta-lastmodified>
  <meta-due-date>11/20/2017</meta-due-date>
  <meta-start-date>10/01/2017</meta-start-date>
  <meta-end-date>11/20/2017</meta-end-date>
  ```
- **Viewing Feedback on Continuous Performance Management Achievements**
  To view the **Feedback** provided on Continuous Performance Management Achievements under *Achievements* tab, enable *Display Achievement Feedback for Performance Goal Achievements* and *Display Achievement Feedback for Development Goal Achievements* and click *Update Form Template*.
- **Configuring Metadata Framework Permission**
  Continuous Performance Management is built on Metadata framework, so to access the Continuous Performance Management entities, such as Achievements and Feedback on Achievements, go to *Admin Center* > *Manage Permission Roles* > *Permission*, and under *Administrator Permissions* > *Metadata Framework* select *Read/Write Permission on Metadata Framework* and *Admin access to MDF OData API*

17.1 Configuring the Achievements Tab Permission using XML

The existing XML tab permission model has been enhanced to recognize the new tab on Continuous Performance Management Achievements, by using tab refid=“achievements” within the tab permissions.

Sample Code

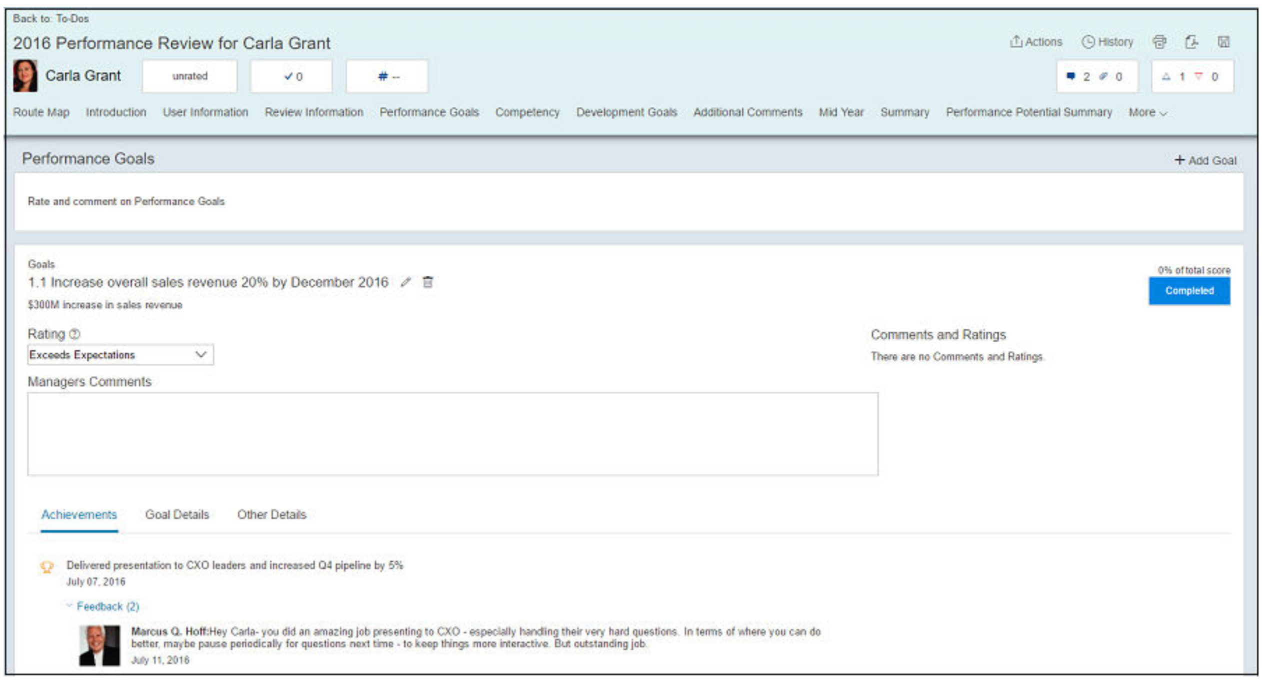
```
    <tab-permission type=“enabled”>
        <role-name>*</role-name>
        <tab refid=“achievements”/>
     </tab-permission>
```

> **Remember**
>
> As a customer, you do not have access to Provisioning. To complete tasks in Provisioning, contact SAP Cloud Support.

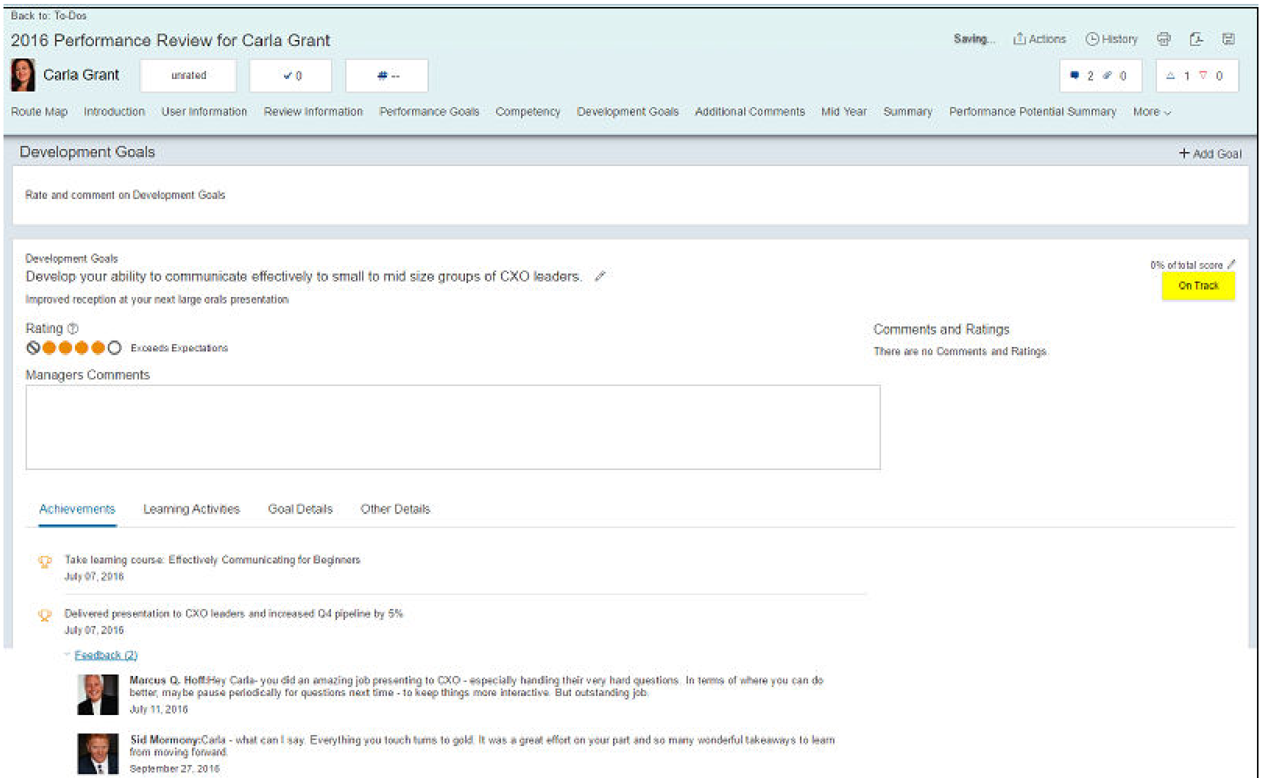
17.2 Continuous Performance Management Achievements Linked with Goals

With this integration, when you link Continuous Performance Management Achievements with a performance or a development goal, the Achievements column appears on your Performance Review form, under the respective goal sections.

Achievements linked with Performance Goal



Achievements linked with Development Goal


Back to: To-Dos
2016 Performance Review for Carla Grant
Saving...
Actions
History
Carla Grant
unrated
✓ 0
--
2 0
1 0
Route Map
Introduction
User Information
Review Information
Performance Goals
Competency
Development Goals
Additional Comments
Mid Year
Summary
Performance Potential Summary
More
Development Goals
+ Add Goal
Rate and comment on Development Goals
Development Goals
Develop your ability to communicate effectively to small to mid size groups of CXO leaders.
Improved reception at your next large orals presentation
0% of total score
On Track
Rating
Exceeds Expectations
Comments and Ratings
There are no Comments and Ratings.
Managers Comments
Achievements
Learning Activities
Goal Details
Other Details
Take learning course: Effectively Communicating for Beginners
July 07, 2016
Delivered presentation to CXO leaders and increased Q4 pipeline by 5%
July 07, 2016
Feedback (2)
Marcus Q. Hoff:Hey Carla- you did an amazing job presenting to CXO - especially handling their very hard questions. In terms of where you can do better, maybe pause periodically for questions next time - to keep things more interactive. But outstanding job.
July 11, 2016
Sid Mormony:Carla - what can I say. Everything you touch turns to gold. It was a great effort on your part and so many wonderful takeaways to learn from moving forward.
September 27, 2016

18 Integration with Job Profile Builder (JPB)

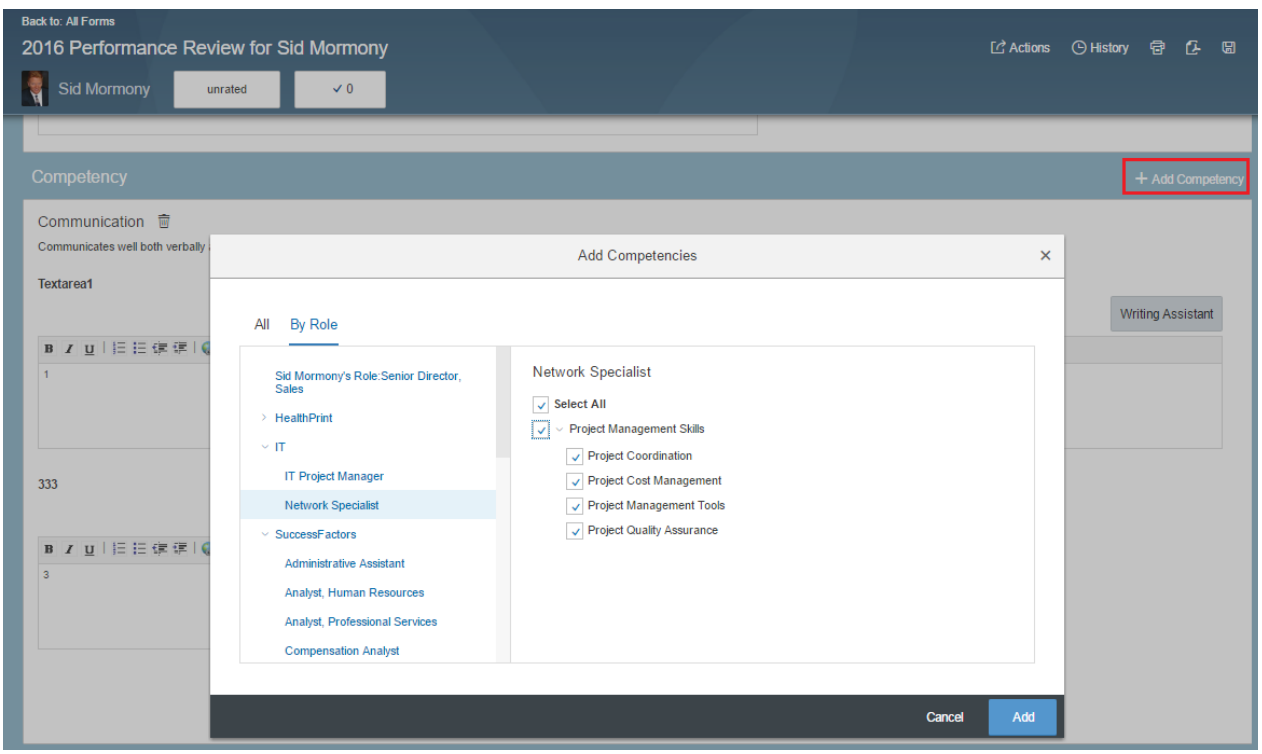
The integration between Performance Management v12 Acceleration and Job Profile Builder allows customers to leverage the competency libraries, core competencies, and role based competencies and competency behaviors configured using Job Profile Builder.

> **Note**
>
> Job Profile Builder skills are not currently integrated with Performance Management.

To auto-populate competency and competency behaviors in the Performance Management form, Competency, and Competency Behaviors should be defined using Job Profile Builder before launching the forms.

Competencies can be added from the Job Profile Builder (JPB) competency library. Configure Job Profile Builder (JPB) competencies as core and auto-populate the form with the core competencies at form launch. Also, auto-populate role based competencies and competency behaviors that are configured using Job Profile Builder (JPB), at form launch.

You can also add competencies after the form is launched by clicking *Add Competency* on the Performance form. When Job Profile Builder (JPB) is used, the competencies in the *Add Competency* page are populated from Job Profile Builder (JPB).



Since Job Profile Builder (JPB) is built on Metadata Framework (MDF), all user roles would need Metadata permission for the employee to be able to view the Job Profile Builder (Metadata Framework) data tied to the employee.

To enable the Metadata permission, go to *Admin Center* > *Manage Permission Roles* > *Permission*, and under *Administrator Permissions* > *Metadata Framework* select *Read/Write Permission on Metadata Framework*.

19 Performance Management Form Features

Some of the additional features of Performance Management v12 Acceleration is described in this section.

1. Team Overview [page 381]
   As a Manager, you can use the*Team Overview* page to organize and complete your team's performance reviews. It also provides you a one-stop status summary for the performance review of all your reports.
2. Get Feedback Feature [page 388]
   The Get Feedback feature allows a rater to send an entire form to someone outside the route map for ratings and comments. The name of the commenter is associated with any text that the person writes. Comments are **not** anonymous.
3. EZ Rater [page 391]
   EZ Rater allows managers to perform easy comparisons between employee self-ratings and manager ratings with Gap Analysis graph to highlight the rating disparities.
4. Using the Notes Block Feature in Performance Management v12 Acceleration [page 392]
   If you are granted with the permission to create notes, you can use the *Notes Block* feature in *Employee Files* to leave notes for a user. You can also share these notes with other users by including them in the viewers list.

19.1 Team Overview

As a Manager, you can use the*Team Overview* page to organize and complete your team's performance reviews. It also provides you a one-stop status summary for the performance review of all your reports.

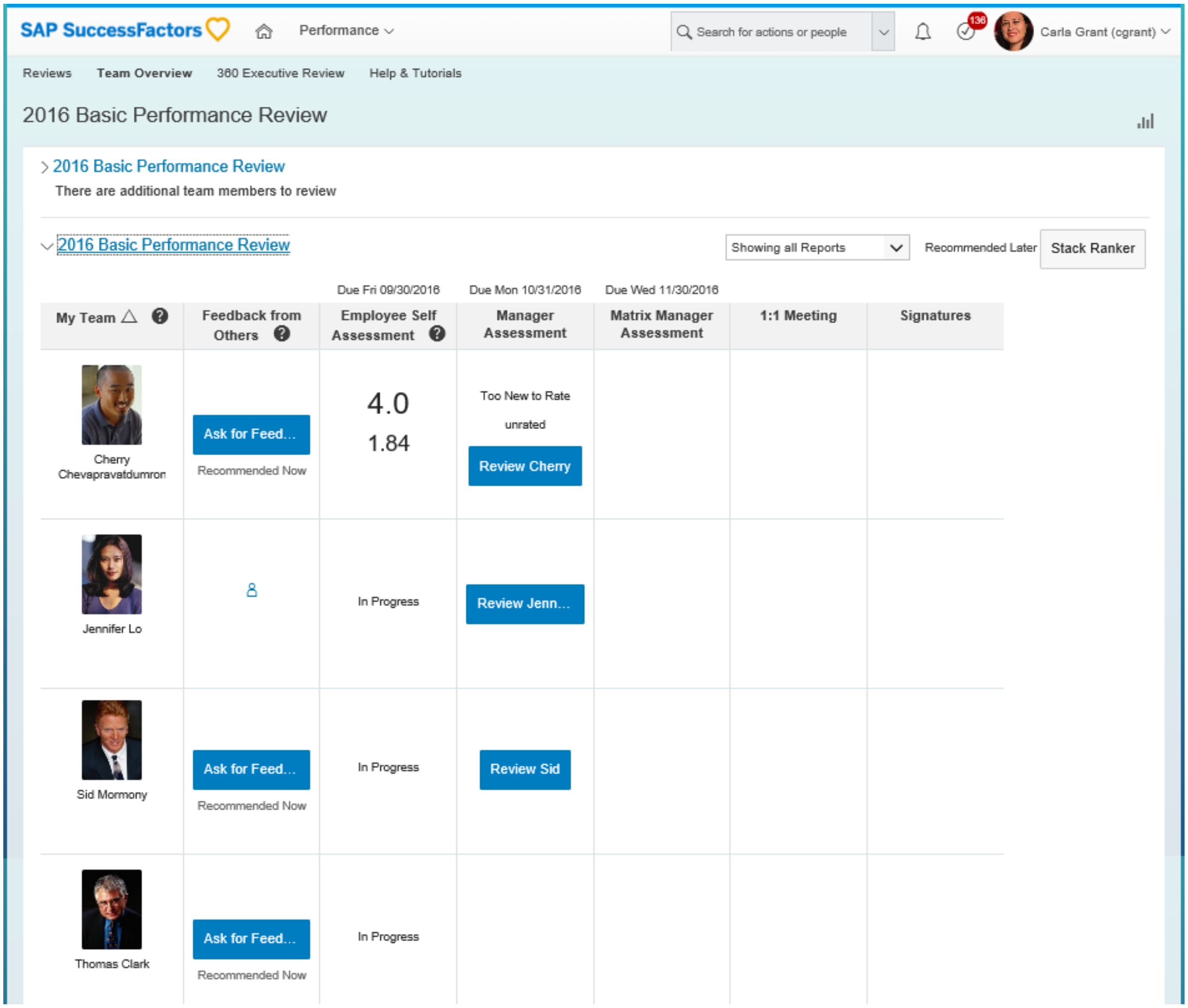
You can easily recognize your pending actions on a Performance form, by clicking on the Distinctive action buttons on this page.

The *Team Overview* page is created for the manager when *Start Review* is enabled in the *Self Assessment* step of the Route map.

> **Note**
>
> When a manager transfer is triggered, the old manager's rating even though the old manager has not rated the employee, will appear on the *Team Overview* page.

The filter on the Team Overview page, next to the Performance form, allows you to filter the employees in your team based on their relationship with you as their rater.

> **Note**
>
> When manual-rating is set to true in the Summary Section of the form, the *Team Overview* page will display the manual rating and not the scale-adjusted rating.



1. **Getting Started**
   Navigate to the *Performance* module and click the *Team Overview* tab.
2. **Team Overview Filter**
   Select a Performance Review form, and from the dropdown list next to it, select the type of reports you want to review. The performance summary of the selected employees appear in a table.
   The possible options that you see may include:
   - Direct Reports: Shows you the performance summary of your direct reports.
   - Indirect Reports: Shows you the performance summary of your indirect reports.
   - HR Reports: Shows you the performance summary of your HR reports.

> **Note**
>
> You can *Select all* to view the performance summary of all the employees reporting to you.

3. **Feedback from Others**
   Click *Ask for Feedback* to send emails asking selected individuals to review the employee's performance. Once the feedback request email is received, individuals can reply directly to the e-mail with their feedback. The feedback provided by internal and external colleagues will be available for direct viewing from the Team

Overview page. Managers can view this feedback in the supporting information pod on the Performance Management form.

4. **Team Overview page displays all the Route Map steps**
   The manager can click *Review* to rate and comment on the employee's performance, to complete the Manager Assessment. Also, the information about the employee self assessment step showing the performance rating is applicable to any step (not just the employee).

   > Note
   >
   > You can also enable *Display check mark instead of rating in Team Overview* from *Admin Center* > *Form Template Settings*.

5. **Stack Ranker**
   Click *Stack Ranker*to enter and stack rank your direct reports' competency ratings after the employees have completed their Self-Assessments.
6. **1:1 Meeting**
   Meet with your employee to discuss the results of the performance review. Afterwards, click *Confirm 1:1 meeting and send to <employee name>*to confirm the meeting took place.
7. **Signatures**
   The performance review form is sent to the employee for electronic signature and then returned to you. Click *Sign* to electronically sign the form, confirming the discussion took place. This completes the review process.

Parent topic: Performance Management Form Features [page 381]

Next: Get Feedback Feature [page 388]

Related Information

Ask For Feedback [page 383]
Stack Ranker [page 190]

19.1.1 Ask For Feedback

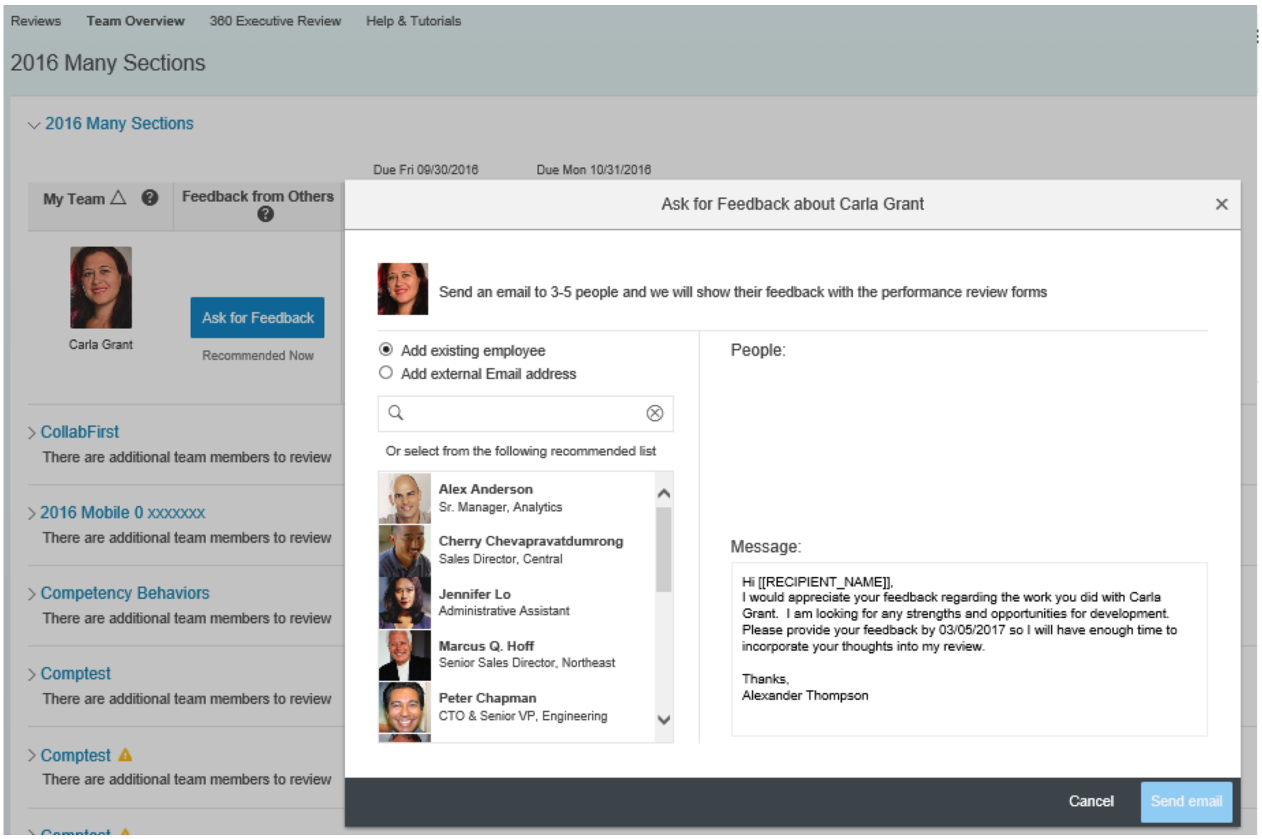
Ask for Feedback is an integrated approach to solicit feedback from users via email.

Effective and timely feedback is a critical component of a successful performance management program and should be used in conjunction with setting performance goals. If effective feedback is given to employees on their progress towards their goals, employee performance will improve. A multi-perspective set of feedback allows managers to provide a more balanced review that considers other people's point-of-views.

Ask for Feedback functionality is the ability to send an e-mail to one or more individuals asking for feedback, and the individuals can reply directly to that e-mail with their feedback. The e-mail feedback appears directly in the form itself in the supporting tab. This feature only exists for Performance Management v12 Acceleration.

Feedback can come from many different sources: managers and supervisors, peers, and customers just to name a few. This feature also allows people from outside the organization who could not be added to a route map to provide feedback on an employee's performance.

You can set fixed or relative start and end dates, defining the period during which managers can request and people can respond with feedback. The relative dates can be set relative to the Form Creation Date, or the Default Start, End or Due dates.

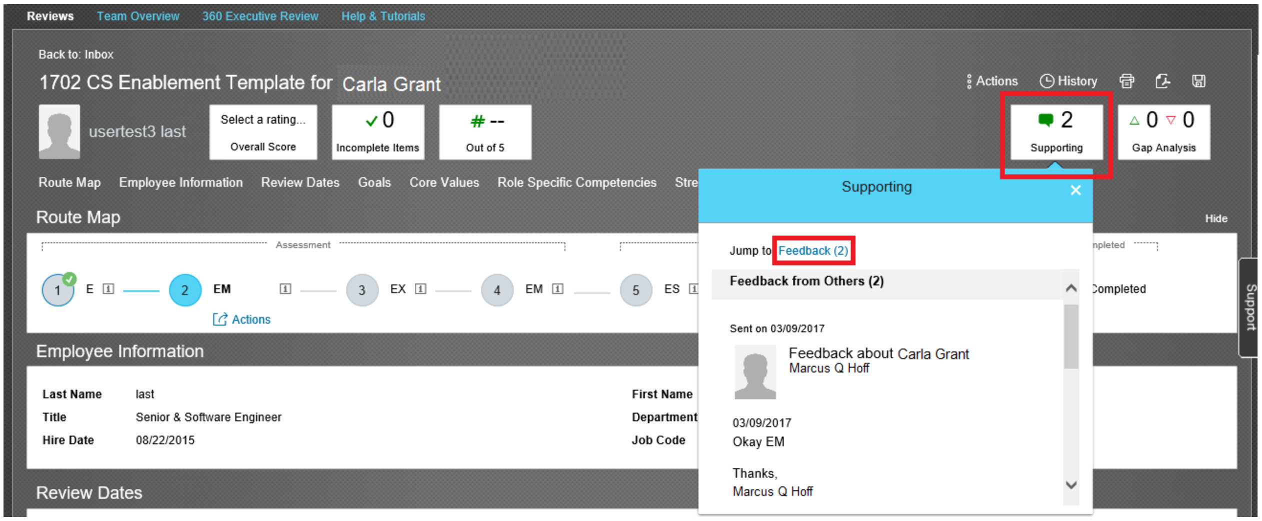


19.1.1.1 Ask for Feedback: Supporting Pod Permissions for Additional Roles

This feature allows additional roles to view the *Ask for Feedback* responses, in Supporting Information Pod.

Context

Feedback is an essential part of the Performance Review cycle so it is important that employees have visibility into the feedback that has been provided to them by their peers.



Previously, the Supporting pod on the Performance Review form displayed the *Ask for Feedback* responses only to those users who had requested the feedback. For example, during the Performance Review process, if a Manager had requested feedback for an employee, that feedback information was visible only to the Manager. Other stakeholders in the review process, including the employee, were not able to view the feedback.

This opt-in feature allows all user who have access to the form to view the Ask for Feedback responses in the Supporting pod.

Procedure

1. To view the feedback responses in the Supporting pod, go to *Admin Center* > *Form Template Settings* and select a template.
2. Select *Enable Ask for Feedback Responses in Supporting Pod permissions* option in the form template.

> **Note**
>
> Enabling this option will automatically enable the *Ask for Feedback* responses for all roles in all route map steps for complete, in progress and new forms.

19.1.1.1.1 Granting permission for a Role or for a Route Map Step

After enabling the *Enable Ask for Feedback Responses in Supporting Pod permissions* option in the template, you can now grant permission for a role at route map steps.

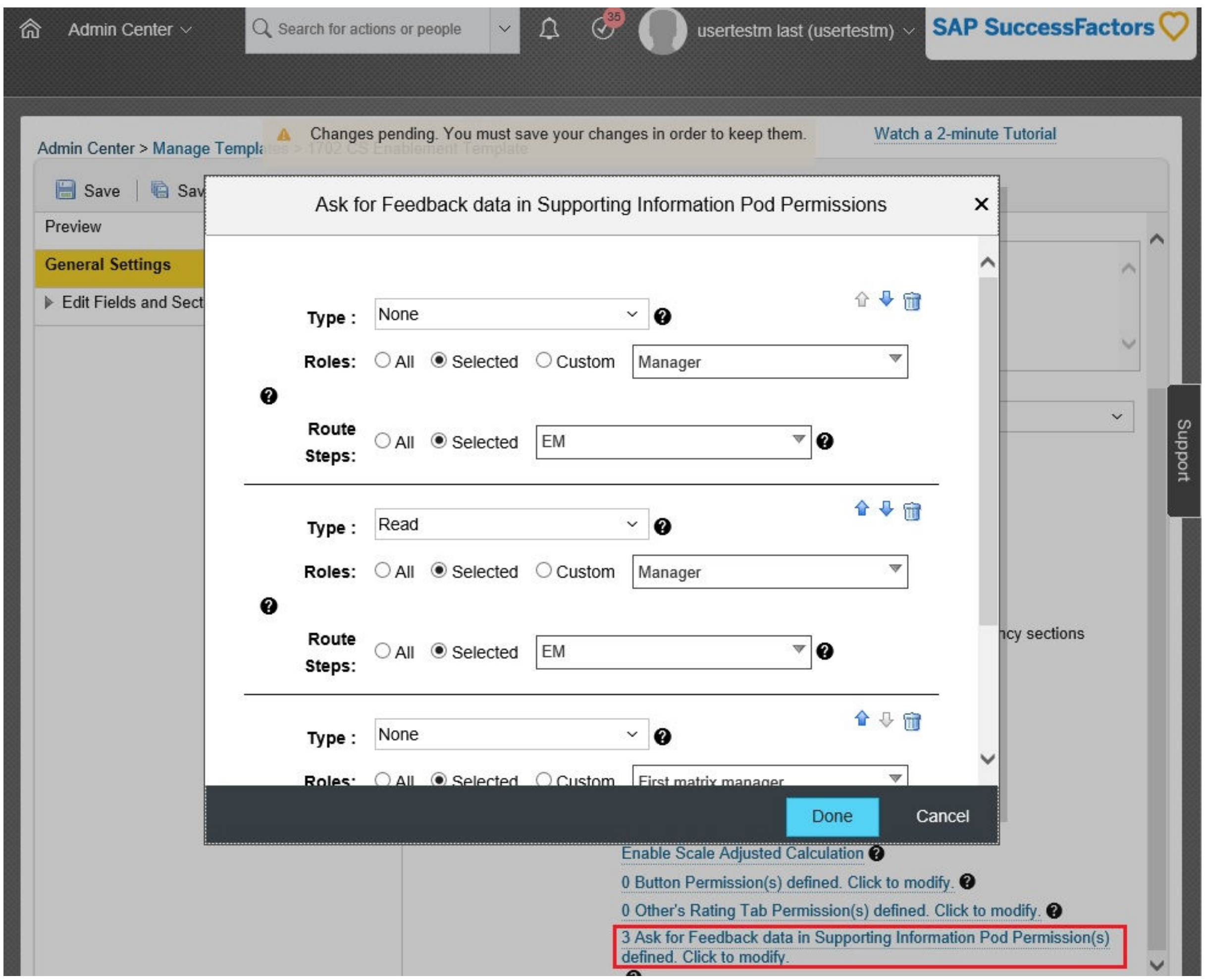
Context

If you want to apply permissions for a role or for a route map step, it is recommended that you apply these permissions for new forms, and not for forms in-progress.

To grant permission for a role or for a route map:

Procedure

1. Go to *Admin Center* > *Manage Templates* and select the template for which you have enabled *Ask for Feedback data in Supporting Information Pod Permissions* in *Form Template Settings*.
2. Go to *Show Advanced Options* and click *Ask for Feedback data in Supporting Information Pod Permissions*.



3. In the *Ask for Feedback data in Supporting Information Pod Permissions* popup, you can grant permission for a role at a route map step by selecting a specific role and a specific step from the dropdown menu.

   If you plan to permission this feature, first grant *None* permission for all roles in steps and then grant the desired *Read* permissions.

19.1.1.2 Disabling the External Email Address Feedback Option

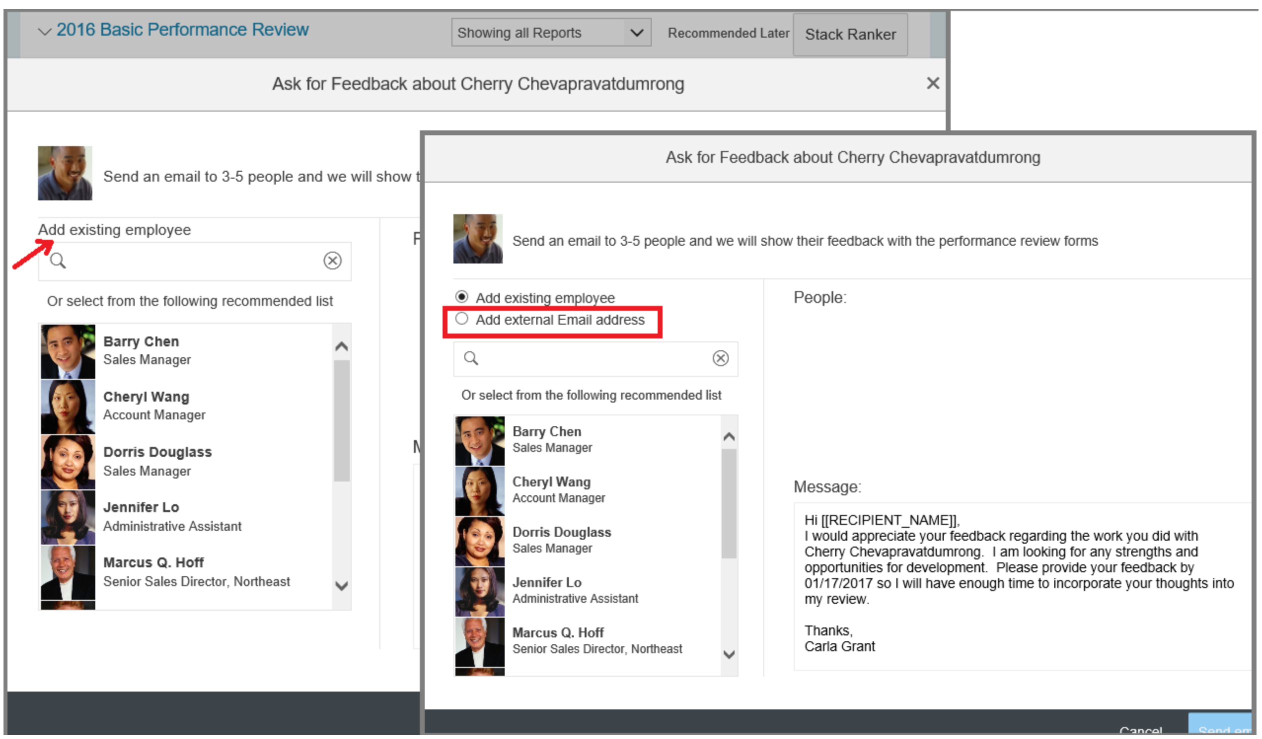
By default, the **Ask for Feedback** page allows employees to request feedback from internal employees and external stakeholders.

Now, you can choose to gather feedback from internal employees only. In which case, the option for external stakeholders will not be displayed.

1. To disable external email address feedback option, go to *Admin Center*.
2. In the *Tools Search* field, search for *Form Template Settings*. The *Managing Form Templates* page appears.
3. Click on the Performance Management v12 Acceleration Form from the list, and select *Disable the external email address feedback option*.
4. Click on *Update Form Template* to save the changes.

Result:

Add external Email address option will not be appear in the *Ask for Feedback*.



19.2 Get Feedback Feature

The Get Feedback feature allows a rater to send an entire form to someone outside the route map for ratings and comments. The name of the commenter is associated with any text that the person writes. Comments are **not** anonymous.

The following table shows a comparison between *Get Feedback* and *Ask for Feedback*:

Get Feedback	Ask for Feedback
You send the actual form asking for comments and ratings.	You send an e-mail request for feedback.
You send the form to one individual at a time.	You can send the e-mail to more than one person at a time (up to 30 people).
Comments and ratings are added to the form.	The recipient can simply reply to the e-mail.
Requires special configuration in the form itself to support the desired behavior.	The e-mail feedback is accessed from the supporting pod within the form.

Note

The Get Feedback functionality is not available when the form is in the Collaborative step of the Route map. This is the expected behavior of the system since at this point in the process, the form is visible to both the Employee and the Manager. Given that the *Get Feedback* button is restricted only to the resource who initiated the feedback process (in this case the Manager), the same cannot be displayed at the step where both the Manager and the Employee have access to the same form.

Parent topic: Performance Management Form Features [page 381]

Previous: Team Overview [page 381]

Next: EZ Rater [page 391]

19.2.1 Configuring Get Feedback Button on Form

The *Get Feedback* button can be configured to allow the user to whom the form is sent to add only comments or to add both comments and ratings.

Context

To configure *Get Feedback* button on the Performance form:

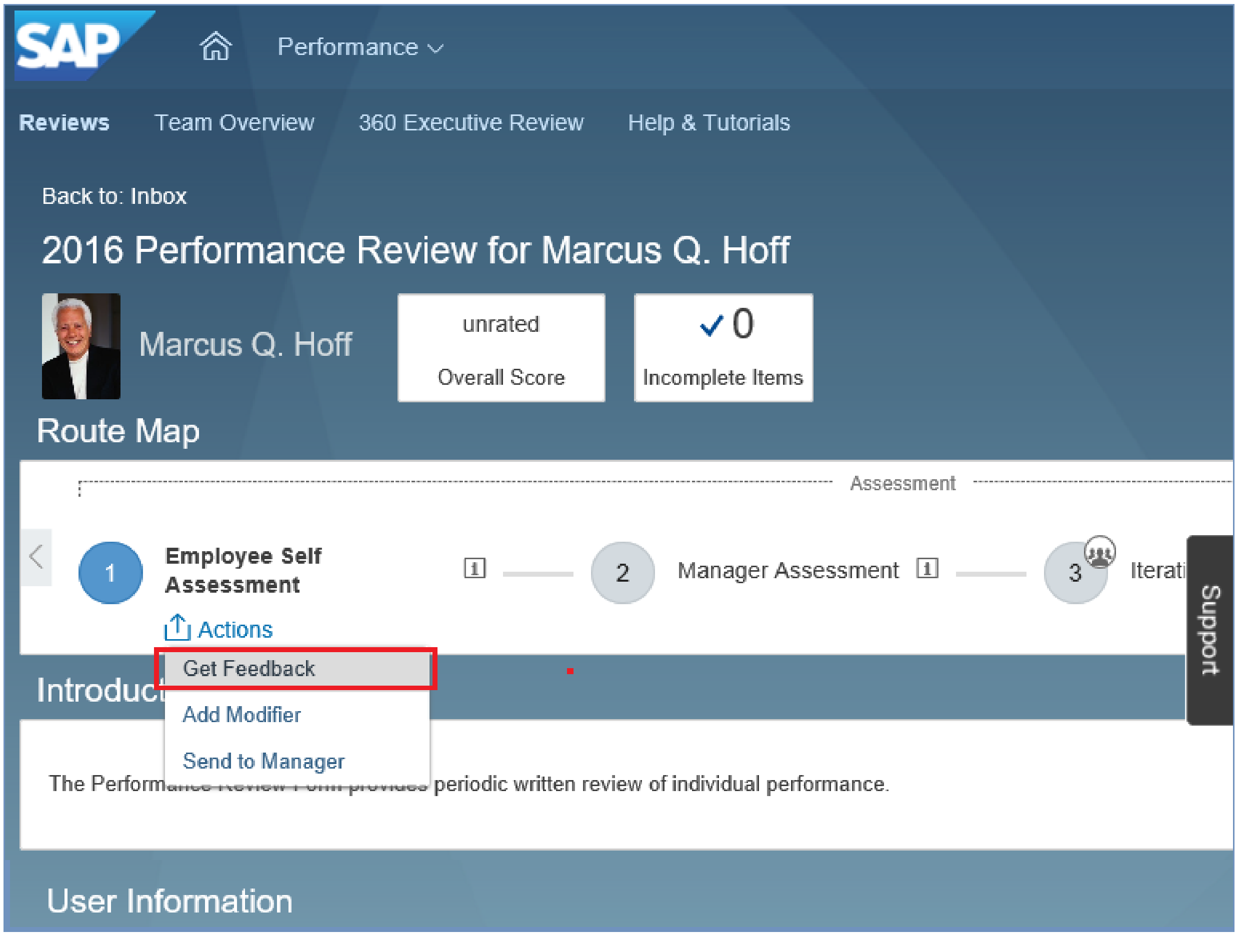
Procedure

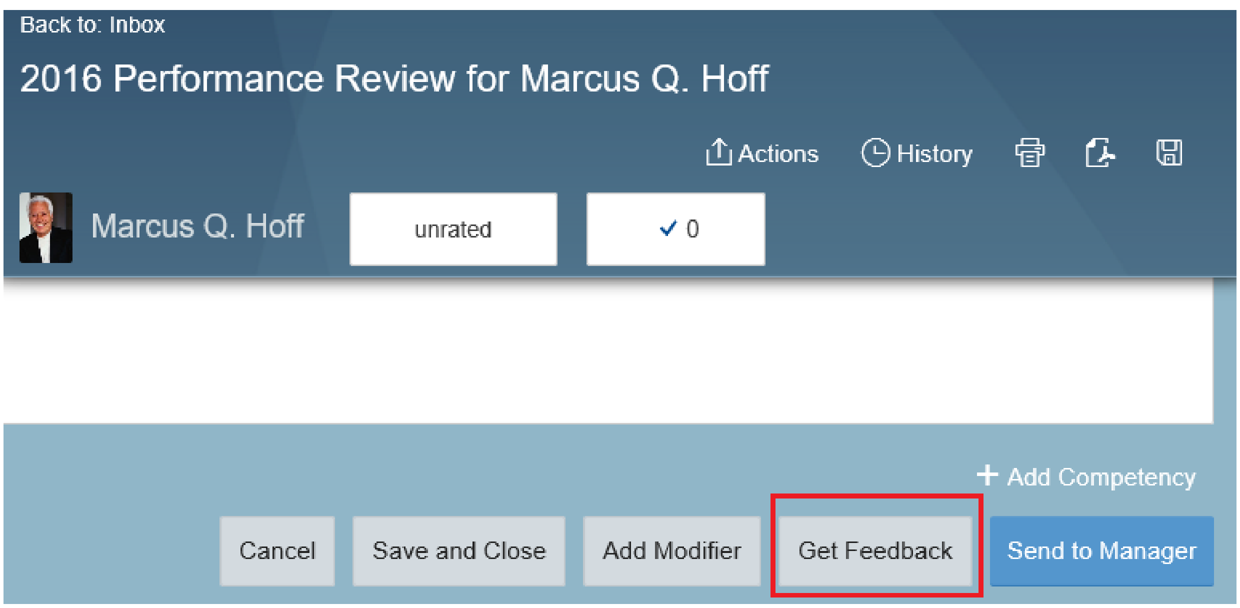
1. Go to *Admin Center* > *Manage Templates* > *<Form>* and select the Performance Review form.
2. On the Performance Review form, go to *General Settings* and click *Advanced Settings* uncheck *Disable Ask For Comment Routing* and *Disable Ask For Edit Routing* options and click *Update Form Template*.

   Managing Form Templates opens.
3. On the *Managing Form Templates* page, uncheck *Disable Ask For Comment Routing* and *Disable Ask For Edit Routing* options and click *Update Form Template*.

Results

You can access the *Get Feedback* button either from the Route Map section of the form, or from a button at the bottom of the screen.





When you click *Get Feedback*, a new window opens in which you can search for, select, and confirm the name of the person from whom you want to get feedback.

> **Note**
>
> You can recall the form when it is out for feedback without having to go through an administrator.

You can also see if a form is out for feedback from the Team Overview page.

19.3 EZ Rater

EZ Rater allows managers to perform easy comparisons between employee self-ratings and manager ratings with Gap Analysis graph to highlight the rating disparities.

Enabling EZ Rater

EZ rater works only for objective section and competency section. You can enable EZ Rater in Provisioning by setting `sect-mode="EZ-Rater"` in form template xml section.

> **Remember**
>
> As a customer, you do not have access to Provisioning. To complete tasks in Provisioning, contact SAP Cloud Support.

Additional Configurations

- `ez-rater-expand-all= "true"|"false"`
  If a particular section of the Performance form is in EZ-Rater mode, and "ez-rater-expand-all" is set to "true", then all objective details are expanded. If this value is set to 'False', then the all objective details are collapsed.
- `<ez-rater show-gap="true"/> by default gap will be shown`
  If a particular section of the Performance form is in EZ-Rater mode, and "ez-rater show-gap" is set to "true" (which is the default value), then an on-form gap analysis will be shown.
- You can want the Manager's rating to appear first in the EZ rater Mode, select *Show Manager Rating first for EZ Rater mode* from *Admin Center* > *Form Template Settings* .

Example: This example shows how EZ rater can be used in a competency section.

```
<competency-sect index="0" configurable= "false " mgt-only= "false " use-jobcode=
"true " category-filter-opt= "no-filter" no-rate= "false " no-weight= "true " summ-
opt= "99999" split-cmt= "false " rating-opt= "3" cmt-opt= "2" suppress-item-
comments= "3" behavior-rating-opt= "0" behavior-cmt-opt= "0" behavior-mode-opt= "0"
in-summ-display= "true " in-overall-rating= "true " no-group= "false " use-
behavior= "false " if-no-ratings-then-ignore-section= "true " lock-item-weights=
"false " in-objcomp-summ-display= "false " in-objcomp-summ-overall-rating= "false "
show-comp-expected-rating= "false " comp-expected-rating-format= "0" show-behavior-
expected-rating= "false " behavior-expected-rating-format= "0" behavior-weighted=
"false " sect-mode= "EZ-Rater" ez-rater-expand-all= "false "
```

```
show-calculated-section-rating= "true "> <comp-sect-name><![CDATA[EZ Rater
Comps]]></comp-sect-name> <comp-sect-intro>
<![CDATA[This is an example of using EZ rater.]]></comp-sect-intro>
    <fm-sect-config> <rating-label><![CDATA[Rating]]></rating-label>
         <rating-label-others><![CDATA[Rating]]></rating-label-others>
         < default-rating><![CDATA[unrated]]></ default-rating>
        <hidden-strength-threshold>0.0</hidden-strength-threshold>
        <blind-spot-threshold>0.0</blind-spot-threshold>
        <num-decimal-places>2</num-decimal-places>
        <publish-button-label><![CDATA[Publish Content]]></publish-button-label>
    </fm-sect-config>
    <sect-weight>0.0</sect-weight>
     <fm-sect-scale show-value= "true "> <scale-source>1</scale-source>
         <scale-id><![CDATA[2005b]]></scale-id> <scale-type>
            <![CDATA[HORIZONTAL_RADIO]]></scale-type>
     </fm-sect-scale>
    <meta-grp-label><![CDATA[Group]]></meta-grp-label>
</competency-sect>
```

Parent topic: Performance Management Form Features [page 381]

Previous: Get Feedback Feature [page 388]

Next task: Using the Notes Block Feature in Performance Management v12 Acceleration [page 392]

19.4 Using the Notes Block Feature in Performance Management v12 Acceleration

If you are granted with the permission to create notes, you can use the *Notes Block* feature in *Employee Files* to leave notes for a user. You can also share these notes with other users by including them in the viewers list.

Prerequisites

- Ensure the *Provisioning* > *[Company]* > *Company Settings* > *Enable Notes* option in Provisioning is enabled.

  > **Remember**
  >
  > As a customer, you do not have access to Provisioning. To complete tasks in Provisioning, contact SAP Cloud Support.

- To grant permission for the logged in user to view the notes, enable *Admin Center* > *Manage Permission Roles* > *[Permission Role]* > *Permissions* > *User Permission* > *Employee Views* > *Notes*.
- To grant permission for the logged in user to create notes, enable *Admin Center* > *Manage Permission Roles* > *[Permission Role]* > *Permissions* > *User Permission* > *General User Permission* > *Permission to Create Notes*.

Context

The subject users for whom you leave a note can view the note on their Employee Profile and not on their Performance form. As a Manager, if you leave a note for a subject user, you will be able to view your note on the *Supporting Pod*, on the subject user's Performance form.

> **Note**
>
> You can use the *Add Notes* button on the Employee Profile page under the *Notes* tab, or you use the *Add Notes* option under the *Take Action* tab on the same page.

Procedure

1. To add a note, go to *Admin Center* > *Employee Files*, under the *Notes* tab, click *Add Notes*.

   The *Add Notes* dialog box dialog box opens.
2. To add additional users to the viewers list, click *Add Viewer* and select the viewer from the dropdown list.
3. Enter a suitable title for your note in the *Title* field.
4. Type you note in the *Comments* field.
5. Click *Submit* to save your note.

Task overview: Performance Management Form Features [page 381]

Previous: EZ Rater [page 391]

20 Working with Ad-hoc Reporting

You can create ad hoc reports to track details such as the list of completed activities, the achievements year to date, the total number of one-on-one meetings between employee and manager, and so on. To generate the ad hoc reports you need to have access to the Reports module in your application.

Restriction

Ad Hoc reporting only supports up to 4,000 characters for textarea fields. If you have configured a textarea field to have a maximum character count to be > 4,000, you will only be able to report on the first 4,000 characters entered. It is a known limitation that ad hoc reports only supports reporting on ~4,000 characters due to DB limitations. By design, ad hoc report pulls the data from FEEDBACK table, which has the limitation of 4000 character and Performance Management form pulls the data from form content blob, hence the difference in form and ad hoc reports.

20.1 Configuring the Reports module

You should enable the Reports module for accessing it in your application instance.

Procedure

1. Launch the application, log in as Admin and go to *Admin Center*.
2. In the *Tool Search* field, search for *Manage Permission Roles*.
3. On the *Permission Role List* page, select the permission role created for managers. The *Permission Role Detail* page appears.
4. Under *Permission settings*, click *Permission*.
5. In the *Permission settings* dialog box, under *User Permissions*, click *Reports Permission*.
6. Select *Create Ad-Hoc Report*.
7. Select *Run Ad-Hoc Report*.
8. Click *Done*.
9. On the *Permission Role Detail* page, scroll down to the *Grant this role to* section, and ensure that the role is associated with the group you've created for Continuous Performance Management managers.
10. Click *Save Changes*.

Results

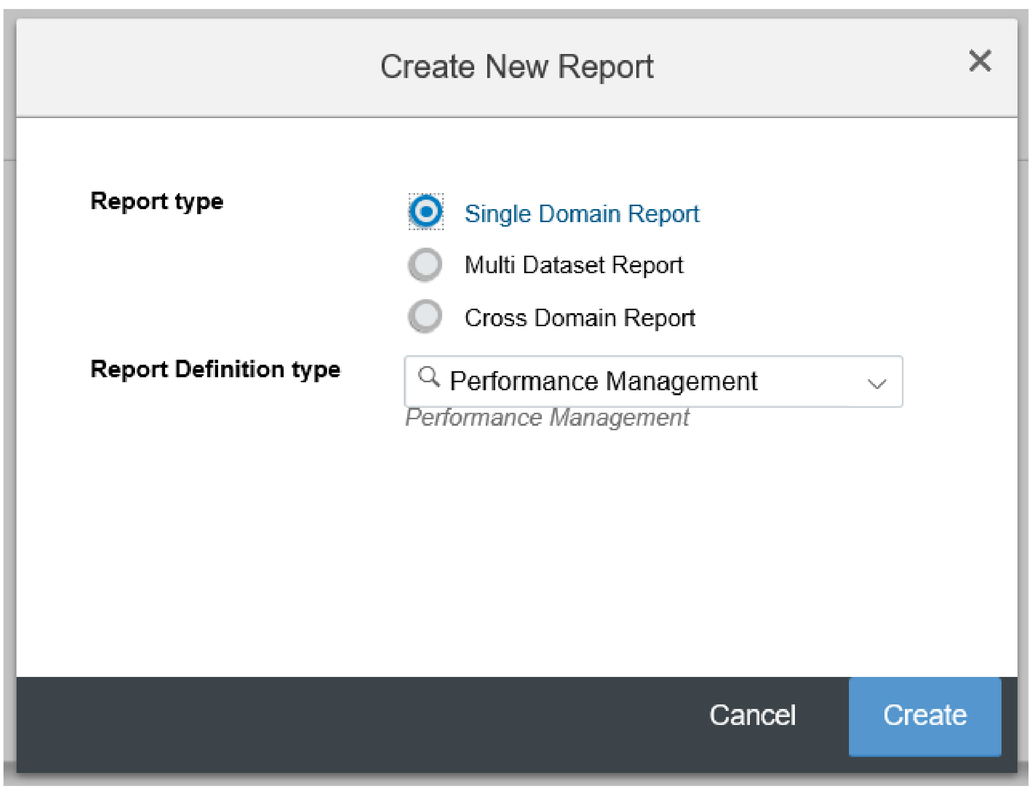
The ad-hoc reporting module is now accessible in the application.

20.2 Creating an Ad-hoc report

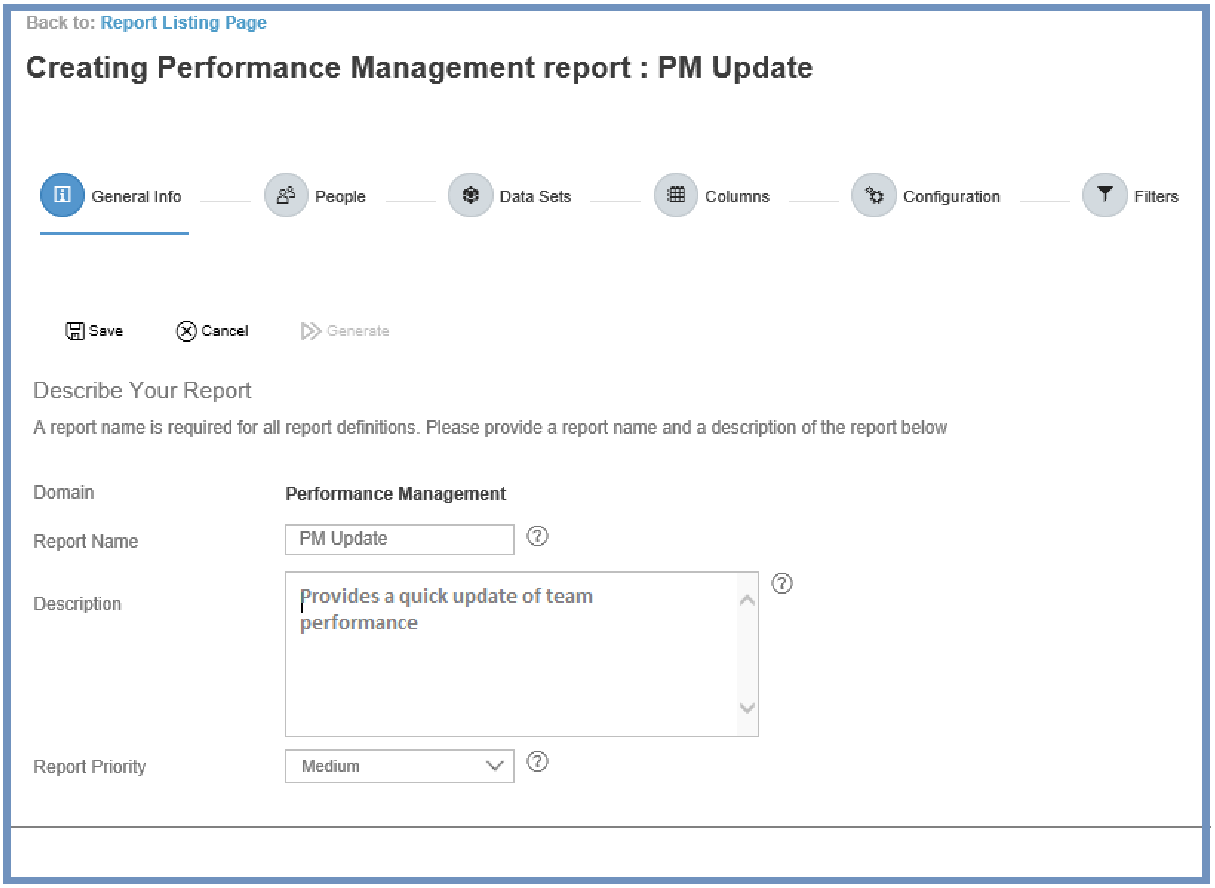
You can easily generate ad-hoc reports on Performance Management.

Procedure

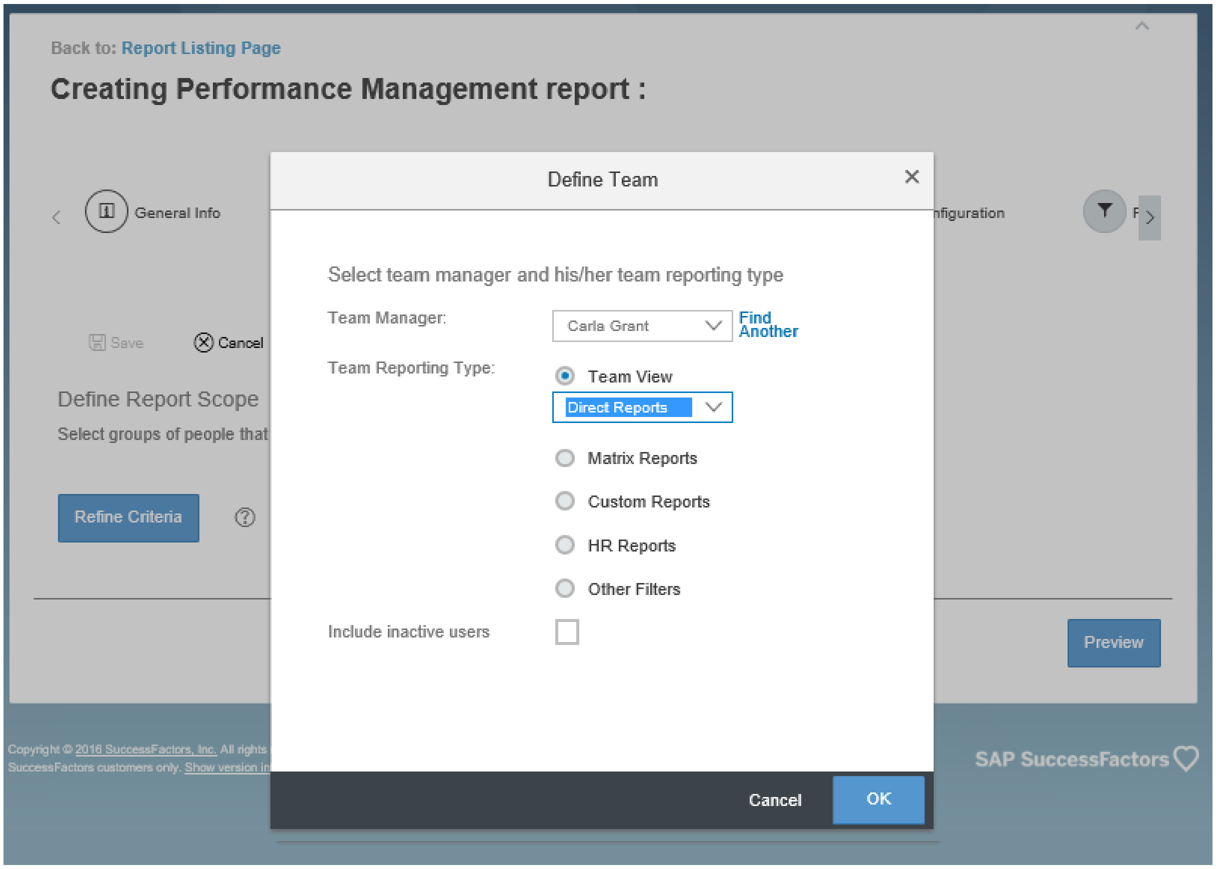
1. Launch the application, log in as Admin and go to *Admin Center*.
2. Click the *Analytics* tab, and under *Reports*, click *Ad Hoc Reports*.
3. Click *Create New Report*.



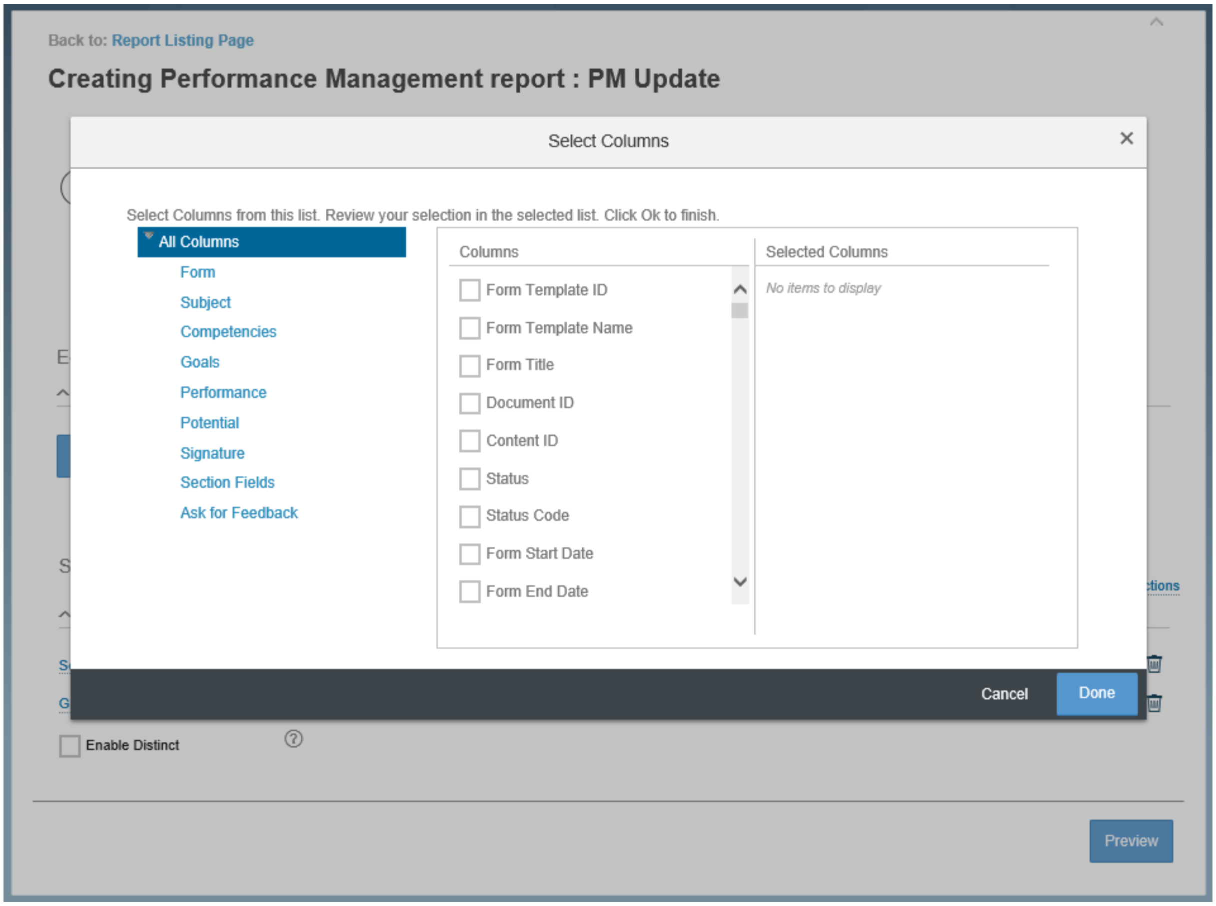
4. For the *Report Type* field, select *Single Domain Report*.
5. From the *Report Definition Type* dropdown list, select *Performance Management,* and click *Create*.



6. On the *Creating Performance Management report* page, under the *General Info* tab, enter *Report Name*, *Description,* and set the *Report Priority*.
7. To include the employees to be considered while generating the report, click the *People* tab, and under *Define Report Scope*, click *Refine Criteria*.



8. In the *Define Team* dialog box, select *Team Manager*, select *Team Reporting Type* and click *OK*.
9. Then, to configure the fields that you need in your ad-hoc report, click the *Columns* tab.
10. In the *Edit Columns* section, click *Select Columns*. The *Select Columns* dialog box appears.



11. Select the fields you need as columns in your report, and click *Save*.

    'Ask for Feedback' data has been added to the Performance Management schema in Ad Hoc Reporting. As a result, you can now view 'Ask for Feedback' information like who requested the feedback, when it was requested and who responded.

    > **Note**
    >
    > Note that this will not include the actual content of the feedback provided.

Results

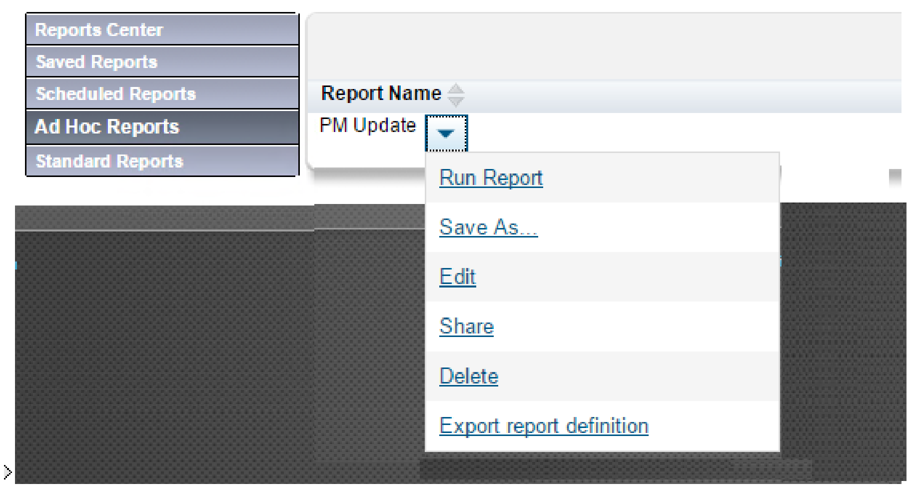
You have successfully created your ad-hoc report.

20.3 Running the Ad-Hoc Report

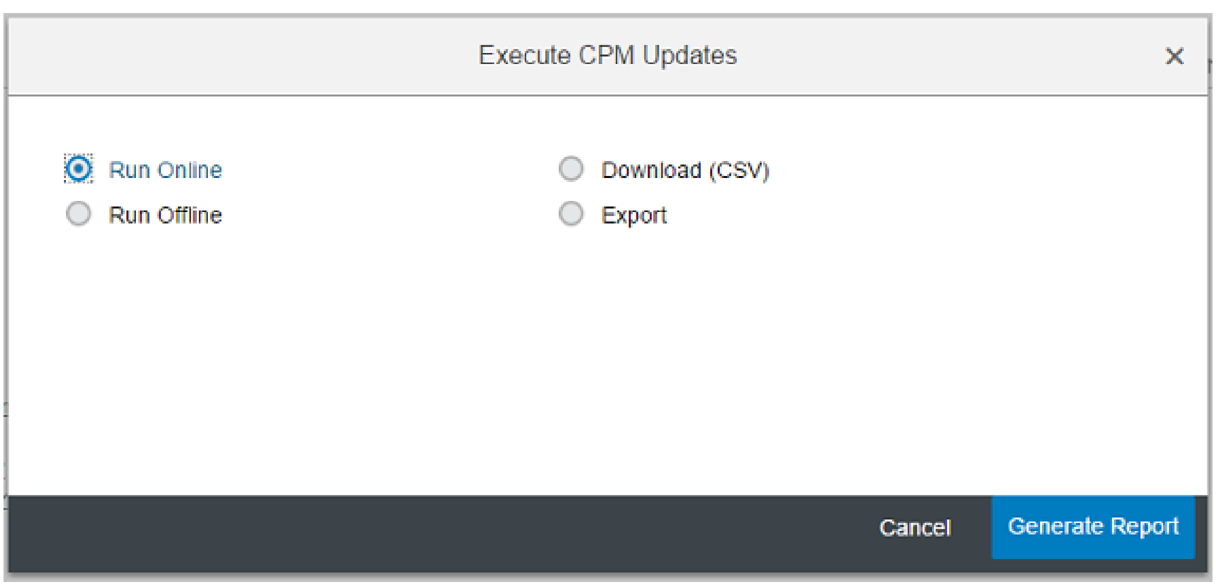
Context

Procedure

1. To run the report, click *Back to: Report Listing Page* , and next to the *Report Name*, click the drop-down list, and select *Run Report*.



2. On the *Execute <Report Name>* pop-up window, select the type of output you want to generate, and click *Generate Report*.



Results

Your ad-hoc report will be generated. You can download the file in PDF, CSV, Excel, or PPT format for later use.

20.4 Applying Filters to Ad-hoc Reports

You can generate customized ad-hoc reports by applying filters to the fields in your report.

Context

You can create and apply one or more filter groups, to every ad-hoc report you generate.

Procedure

1. Launch the application, and go to the *Reports* module.
2. Click the *Analytics* tab, and under *Reports*, click *Ad Hoc Reports*.
3. For an existing Performance Management report, click the corresponding dropdown list, and select *Edit*.

   The *General Info* tab of the report appears.
4. Go to the *Filters* tab. By default, one filter group already exists.
5. To configure the filters using the existing 'Filter Group', click *Refine Criteria*. The *Select Filter* dialog box appears.

   The *Select Filter* dialog box appears.
6. Under *Filters*, select a field (that appears as a 'column' in your report) on which you want to apply the filter.

   The *Define <Field name> Filter* dialog box appears.
7. Configure the filter either *By My Selection* or *By Rule*, select relevant options, and click *Done*.
8. Repeat steps 6 and 7 to apply as many filters as you want.
9. On the *Select Filter* dialog box, click *Done*.

Results

You have successfully applied filters to your ad-hoc report.

> **Note**
>
> You can generate an ad-hoc report on your existing activities or on your 1:1 meeting history by applying filter to the Snapshot fields: *Activity Snapshot* and *Other Topic Snapshot*.

- To generate a report on 1:1 meeting history, set the filter as true.
- To generate a report on existing activities in the current 1:1 meeting, set the filter as null or false.

20.5 Localization of Rating Description Columns in Ad hoc Reports

In Ad hoc reports, you can now view the rating description of the Rating Description columns in the logged in user's locale. Introduction of new dedicated localized columns reduces data base scan needs for all localized data and improves report performance, when such columns are added as part of a report or as a filter.

Localization of the Rating Description columns in Ad hoc reports led to data discrepancy between the rating description on the form and the Ad hoc Reports, whenever the rating scale descriptions were changed after the form was launched. For the Matrix Grid Scale columns in Ad hoc reports, data discrepancy was caused between the description on the form and the Ad hoc Reports, whenever the matrix grid scale descriptions were changed after the form was completed.

To address this issue, all the existing rating description columns used in Ad hoc reports will now show the rating descriptions which were configured using *Admin Center* > *Rating Scales*, in the rating scale default locale.

Also, all the Matrix Grid based columns, will show the latest description for in-progress forms, which were configured using *Admin Center* > *Matrix Grid Scale*, in the company default locale. If the Matrix Grid Scale descriptions are changed after the form is completed, it will lead to data discrepancy in the Ad hoc reports.

For localized descriptions, 20 new columns have been added. Additionally, 4 new columns have been added to localize only the rating scale based descriptions.

Types of Rating Description Columns in Ad Hoc Reports [page 401]
There are three different types of Rating Description Columns in Ad Hoc Reports. They are Rating Description Columns (Default Locale) also known as Default Rating Description column, Rating Description Columns (Locale Specific) and Unadjusted Rating Description Columns (Locale Specific).

Limitations [page 404]
This section lists some of the known limitations that you will encounter with the rating description columns in Ad Hoc reports.

20.5.1 Types of Rating Description Columns in Ad Hoc Reports

There are three different types of Rating Description Columns in Ad Hoc Reports. They are Rating Description Columns (Default Locale) also known as Default Rating Description column, Rating Description Columns (Locale Specific) and Unadjusted Rating Description Columns (Locale Specific).

- **Rating Description Columns (Default Locale)**: The rating description columns used in Ad Hoc reports shows the rating descriptions which were configured using the *Rating Scales*, in the rating scales default locale.
  Also, all the matrix grid scale based columns, will show the latest description for in-progress forms, which were configured using *Admin Center* > *Matrix Grid Scale*, in the company default locale.

- **Rating Description Columns (Locale Specific)**: For localized descriptions, 20 new columns have been added, and these column names will be appended with the text *(Locale specific)*, and will appear next to the column with default locale, in the Ad Hoc Reports.

> **Note**
>
> Out of these 20 columns, 13 columns are Scale based columns, which means they were configured using Rating Scales and 7 are Template based also known as Adjusted columns, which means they were configured in the template using *Admin Center* > *Manage Templates* > *<Form Template>* > *Show advanced options* > *Rating Scale Adjusted Calculation*.

- **Unadjusted Rating Description Columns (Locale Specific)**: As the Template based adjusted rating descriptions are performance intensive, 4 new columns have been added to localize only the rating scale based descriptions.
  These 4 new columns are prefixed with the text *Unadjusted* and are shown just below the *(Locale specific)* column. For example, Unadjusted Competency Official Rating Description (Locale specific).
  The 4 Unadjusted columns are:
  1. Unadjusted Competency Official Rating Description (Locale specific)
  2. Unadjusted Goal Official Rating Description (Locale specific)
  3. Unadjusted Overall Performance Rating Description (Locale specific)
  4. Unadjusted Section Rating Label (Locale specific)

Rating Description Columns

The table below lists the three different types of Rating Description Columns:

Rating Description Columns (Default Locale)	Rating Description columns (Locale Specific)	Unadjusted Rating Description Columns (Locale Specific)
Overall Competency Rating Description	Overall Competency Rating Description (Locale Specific)	
Calculated Overall Competency Rating Description	Calculated Overall Competency Rating Description (Locale Specific)	
Adjusted Overall Competency Rating Description	Adjusted Overall Competency Rating Description (Locale Specific)	
Competency Other Rating Description	Competency Other Rating Description (Locale Specific)	
Competency Self Rating Description	Competency Self Rating Description (Locale Specific)	
Competency Official Rating Description	Competency Official Rating Description (Locale Specific)	Unadjusted Competency Official Rating Description (Locale Specific)

Rating Description Columns (Default Locale)	Rating Description columns (Locale Specific)	Unadjusted Rating Description Columns (Locale Specific)
Behavior Other Rating Description	Behavior Other Rating Description (Locale Specific)	
Behavior Self Rating Description	Behavior Self Rating Description (Locale Specific)	
Behavior Official Rating Description	Behavior Official Rating Description (Locale Specific)	
Overall Goal Rating Description	Overall Goal Rating Description (Locale Specific)	
Calculated Overall Goal Rating Description	Calculated Overall Goal Rating Description (Locale Specific)	
Adjusted Overall Goal Rating Description	Adjusted Overall Goal Rating Description (Locale Specific)	
Goal Self Rating Description	Goal Self Rating Description (Locale Specific)	
Goal Official Rating Description	Goal Official Rating Description (Locale Specific)	Unadjusted Goal Official Rating Description (locale specific)
Goal Other Rating Description	Goal Other Rating Description (Locale Specific)	
Overall Performance Rating Description	Overall Performance Rating Description (Locale Specific)	Unadjusted Overall Performance Rating Description (locale specific)
Calculated Overall Performance Rating Description	Calculated Overall Performance Rating Description (Locale Specific)	
Unadjusted Calculated Overall Performance Rating Description	Unadjusted Calculated Overall Performance Rating Description (Locale Specific)	
Overall Potential Rating Description	Overall Potential Rating Description (Locale Specific)	
Section Rating Label	Section Rating Label (Locale Specific)	Unadjusted Section Rating Label (locale specific)

20.5.2 Limitations

This section lists some of the known limitations that you will encounter with the rating description columns in Ad Hoc reports.

- If the rating descriptions are not available in the logged in user's locale, the Scale based columns will show the descriptions in the default locale.
- The Matrix grid scale based columns will show the descriptions in company locale if the descriptions are not available in the logged in user's locale.

> **Note**
>
> If the default company locale changes, there might be an impact on the matrix grid based localized columns.

- If you configure filters for the localized columns and unadjusted rating descriptions are used it might show duplicate and unsorted descriptions.
  - It is recommended that you use the localized columns for report generation.
  - It is also recommended that while applying a filter to a Rating description, you should use the default rating description column.

> **Note**
>
> Every locale specific rating description column has one corresponding default rating description column.

- The *Sort columns* and *Group by (in report generation)* operations might not show the correct sorting order when locale specific column and unadjusted rating descriptions are used.
  - It is recommended that you use the default rating description columns for *Sort columns* and *Group by* operations if your requirement is to perform these operations on Rating description columns.
- There might be an impact on the existing reports, which were configured or generated post Q1, 2017, which used existing rating description columns for filter.

> **Note**
>
> If the filters were configured after Q1 2017, we recommend you to reconfigure these filters. If you do not reconfigure these filters, it will generate blank reports. Also, in some cases it might generate errors.

- Localization is supported only for the forms that got launched during the last five years. Prior to that localization was not supported.
- If the rating description of the Rating Scale or the Matrix Grid Scale is changed, after the form is completed or launched, the latest description will be picked up for localization. However, this might lead to data discrepancy between the rating description on the form and the localized descriptions on the Ad Hoc report.
- For rating descriptions, configuration will always be picked from the latest template. If there is any change in the adjusted configuration, Scale Name, or if any section gets added or deleted after the form is launched, there might be discrepancy in the localized descriptions.
- If you want to view localized values for the existing Rating descriptions in Ad hoc reports, you need to reconfigure the localized columns.
- Change is applicable for both Ad Hoc reports and Dashboards 2.0.
- Localization is provided based on the Scale ID. If the Scale ID is not saved in the report table, localized value will not be shown. In this case, only the adjusted columns will show localized descriptions as these columns were configured in the template.

- If adjusted columns time out while configuring filters, dashboards and generating online reports, use these columns only for generating offline reports.
- For unadjusted columns, if the rating description is same in both the Scale based configurations, as well as the template based configurations, then localization will be picked up from the Scale ID for those descriptions.

20.6 Synchronizing Performance Management Form to Show Correct Reporting Labels in Ad Hoc Reports

A new option has been added in Provisioning to migrate only the completed forms data in the Ad Hoc Reports.

Context

Previously, when Performance Management forms were synched, it included both the in-progress and the completed forms. For a completed form, the Matrix Grid Scale rating label in the Ad Hoc reports displayed the rating label, which was updated after the form was completed, whereas the Performance Management form did not get updated with the new rating label and still displayed the old rating label. This lead to a discrepancy between the Ad Hoc reports and the Performance Management form with respect to the Matrix Grid Scale label.

To overcome this discrepancy a new option *Migrate Completed Forms: If enabled, in-progress forms will not be migrated; only completed forms will be migrated.* has been introduced in *Provisioning*, which when enabled will migrate ONLY the completed forms. The Matrix Grid Scale rating label, which was updated after the form was completed, will not get migrated into the Ad Hoc reports.

To synchronize completed Performance Management forms:

Procedure

1. Go to *Provisioning* > *Company Settings* > *Ad Hoc Report Builder* > *Performance Management Sync*, and click *Sync*.

   > **Remember**
   >
   > As a customer, you do not have access to Provisioning. To complete tasks in Provisioning, contact SAP Cloud Support.

2. On the *Create New Job* dialog box, under *Job Parameters*, select *Migrate Completed Forms: If enabled, in-progress forms will not be migrated; only completed forms will be migrated*.

21 Mobile Performance Reviews

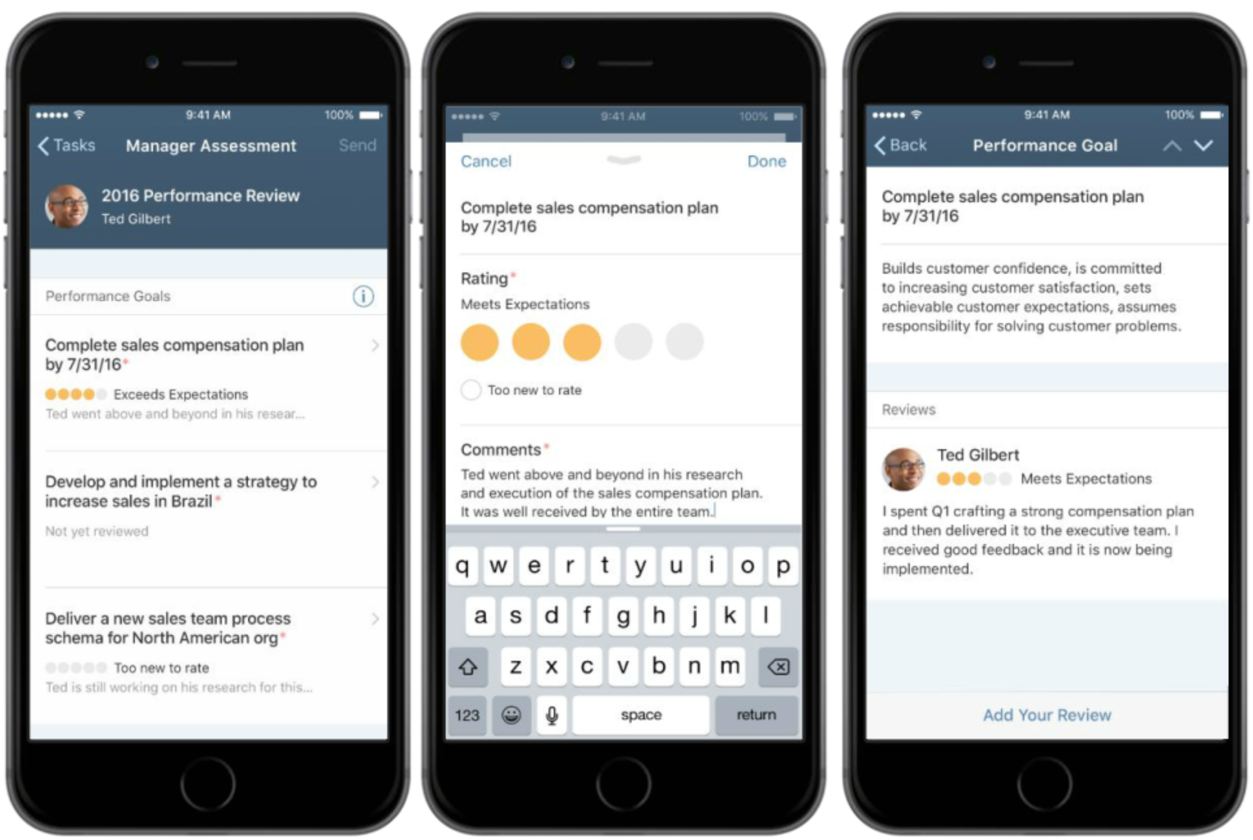
Selected features of the Performance Management form are available for users in the SuccessFactors Mobile Application.

> **Note**
>
> Limited configuration options are supported in the Mobile Application. To view the supported and the nonsupported features, refer Mobile Performance Management Feature Support [page 409]

iPhone, iPad and Android users can fill out their own Performance forms and those of others on their mobile devices.

The limited feature options include the following functionalities:

- View and provide rating and comments for Performance Goals, Development Goals, and Competencies in the Performance Management form
- View summary section calculated and adjusted-calculated overall rating, providing manual overall rating
- View signature section, signers, and date of signature
- Route, sign, and complete forms



The intent of this section is to help you make an educated decision on whether or not you would like to use this feature. Your product adoption decision should be based on current feature support and should always be tested in your preview environment prior to enabling in production.

Related Information

Mobile Performance Management Feature Support [page 409]

21.1 Enabling Mobile Performance Management

Settings to enable **Mobile Performance Review** feature.

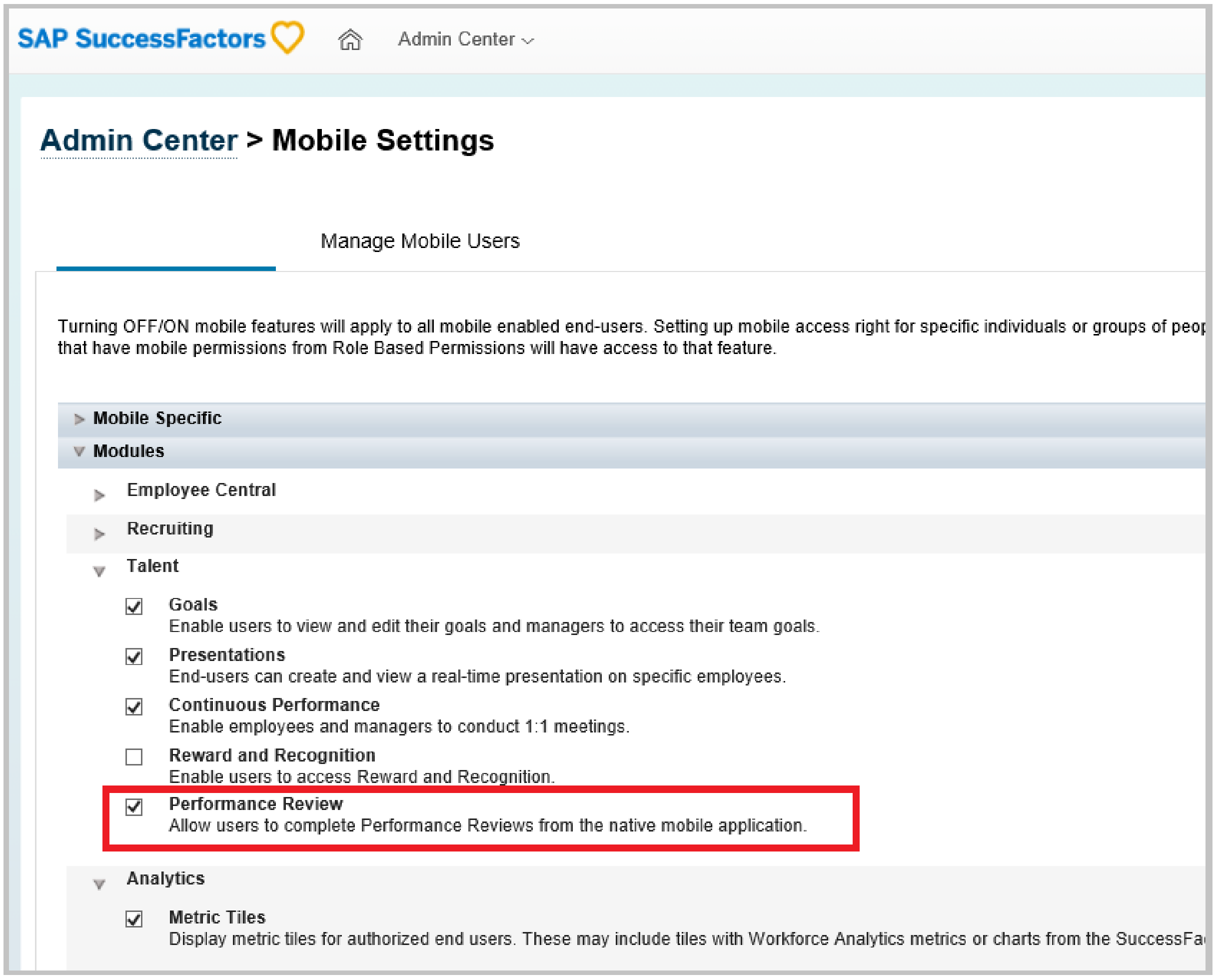
Procedure

1. To enable **Mobile Performance Reviews** in your SAP SuccessFactors system, the following options must be enabled in Provisioning:
    - *Performance Management v12 Acceleration (PMv12A)*
    - *Mobile PM Reviews*

    > Remember
    >
    > As a customer, you do not have access to Provisioning. To complete tasks in Provisioning, contact SAP Cloud Support.

    > Note
    >
    > Performance Management v11 and old Performance Management v12 will not be supported.
2. To enable **Mobile Performance Review** feature from the application, go to *Admin Center* > *Enable Mobile Features*.

    The *Mobile Settings* page opens.
3. Go to *Modules*, and under *Talent* enable *Performance Review*.



Results

Mobile Performance Review feature will be enabled on your mobile device.

21.2 Mobile Performance Management Feature Support

This section lists out all the Performance Management features that are supported by **Mobile Performance Review**.

SuccessFactors Native Mobile Application Operating System Support

SuccessFactors Native Mobile App	Mobile Status	Notes
iOS (iPhone and iPad)	Supported	
Android	Supported	

Performance Form Sections

Performance Form Sections	Mobile Status	Notes
Performance Goal/Objective	Partial support	See Performance Goal/Objective table for details on supported configurations
Competency	Partial support	See Competency table for details on supported configurations
Development Goal/Objective	Partial support	See Development Goal/Objective table for details on supported configurations
Summary	Partial support	See Summary table for details on supported configurations
Signature	Partial support	See Goal/Objective table for details on supported configurations
Introduction	Not supported	
Review Information	Not supported	
User Information	Not supported	
Job Description	No plans to support	
Compensation	No plans to support	
Custom	Not supported	iOS – available; Android – Q1, 2018

Performance Form Sections	Mobile Status	Notes
OCOC Summary	Not supported	
Performance/Potential Summary	Not supported	

Route Map Steps

Route Map Steps	Mobile Status	Notes
Single user steps	Supported	
Iterative steps	Supported	
Collaborative steps	Not supported	

Route Map Actions

Route Map Actions	Mobile Status	Notes
Send to next step	Supported	
Complete Form	Supported	
Sign Form	Supported	
Routing comments	Supported	
Reject Form (Signature Step)	Supported	
Reject/Send to previous step	Planned	Planned for First Half of 2018
Get Feedback	Not supported	
Add Modifier	Not supported	
Add Signer	Not supported	

Roles

Roles	Mobile Status	Notes
All roles	Supported	

Rating Options

Rating Options	Mobile Status	Notes
All rating options	Supported	0, 1, 2, & 3

Rating Scale

Rating Scale	Mobile Status	Notes
All rating scale scores	Supported	1-3, 1-5, 1-7, Build your own
Circle icon scale	Supported	
Dropdown with numeric rating values	Supported	
Dropdown without numeric rating values	Supported	
Star icon scale	No plans to support	We are only offering the circle icon on mobile. The icon rating scale will be used in all scenarios where the dropdown is not used.

Required Fields

Required Fields	Mobile Status	Notes
Required field configurations	Partial support	Required field validation on submission is supported but it is not currently possible to show the user if the following fields are required: • Signature section comment • Summary section Overall Manual Rating

Character Limits

Character Limits	Mobile Status	Notes
Min/ Max Character limit configurations	Partial support	Character limit validation on submission is supported but it is not currently possible to show the user if they are under or over the character limit settings in real-time.

Performance Goal/Objective Section

Performance Goal Section	Mobile Status	Notes
View Performance Goal	Partial support	Cannot view sub-goal table information (tasks, targets, milestones) and comments
Performance Goal rating	Supported	View & edit
Performance Goal comment	Partial support	View & edit; plain text only – See RTE section for RTE expected behavior
Performance Goal section introduction	Partial support	HTML is not supported
Performance Goal section comment	Partial support	View & edit; plain text only – See RTE section for RTE expected behavior
Add Performance Goal	Partial support	iOS – available; Android – Q1, 2018

Performance Goal Section	Mobile Status	Notes
Edit Performance Goal	Partial support	iOS – available; Android – Q1, 2018
Delete Performance Goal	Partial support	iOS – available; Android – Q1, 2018
Custom elements	Not supported	

Competency Section

Competency Section	Mobile Status	Notes
View Competency	Supported	View Competency name & description
Competency Rating	Supported	View & edit
Competency Comment	Partial support	View & edit; plain text only – See RTE section for RTE expected behavior
Competency section introduction	Partial support	HTML is not supported
Competency section comment	Partial support	View & edit; plain text only – See RTE section for RTE expected behavior
Competency Behaviors	Not supported	
Add Competency	Not supported	iOS – available; Android – Q1, 2018
Delete Competency	Not supported	iOS – available; Android – Q1, 2018
Custom elements	Not supported	

Development Goal/Objective Section

Development Goal Section	Mobile Status	Notes
View Development Goal	Partial support	Linked learning activities are not supported
Development Goal rating	Supported	View & edit
Development Goal comment	Partial support	View & edit; plain text only – See RTE section for RTE expected behavior

Development Goal Section	Mobile Status	Notes
Development Goal section introduction	Partial support	HTML is not supported
Development Goal section comment	Partial support	View & edit; plain text only – See RTE section for RTE expected behavior
Add Development Goal	Partial support	iOS – available; Android – Q1, 2018
Edit Development Goal	Partial support	iOS – available; Android – Q1, 2018
Delete Development Goal	Partial support	iOS – available; Android – Q1, 2018
Custom elements	Not supported	

Summary Section

Summary Section	Mobile Status	Notes
Calculated Rating	Supported	
Adjusted Calculated Rating	Supported	
Overall Manual Rating	Supported	View & edit; Required field validation on submission is supported but it is not currently possible to show the user if the field is required
Summary section introduction	Supported	
Summary section comment	Supported	
Summary section table	No plans to support	

Signature Section

Signature Section	Mobile Status	Notes
Signer’s name	Supported	
Signature status	Supported	
Signature date	Supported	

Signature Section	Mobile Status	Notes
Signature section comment	Supported	View & edit; Required field validation on submission is supported but it is not currently possible to show the user if the field is required

Custom Section

Custom Section	Mobile Status	Notes
Custom section introduction	Partial support	iOS – available; Android – Q1, 2018
Custom section comment	Partial support	iOS – available; Android – Q1, 2018
Custom element: label	Partial support	iOS – available; Android – Q1, 2018
Custom element: text	Partial support	iOS – available; Android – Q1, 2018
Custom element: textarea	Partial support	iOS – available; Android – Q1, 2018
Custom element: date	Partial support	iOS – available; Android – Q1, 2018
Custom element: list	Partial support	iOS – available; Android – Q1, 2018
Custom element: integer	Partial support	iOS – available; Android – Q1, 2018
Custom element: double	Partial support	iOS – available; Android – Q1, 2018
Custom element: checkbox	Partial support	iOS – available; Android – Q1, 2018

Other Performance Management v12A Features

Feature	Mobile Status	Notes
Attachments (Supporting Pod)	Not supported	
Notes (Supporting Pod)	Not supported	
Ask for Feedback responses (Supporting Pod)	Not supported	
Team Overview	Not supported	

Feature	Mobile Status	Notes
Ask for Feedback request (Team Over-view	Not supported	
Team Rater/Stack Ranker	Not supported	
Offline support	Not supported	

RTE (Rich Text Editor) fields not supported

Rich Text Editor formatted text is not supported in Mobile Performance Review Phase 1. Therefore, it is recommended that customers using the RTE for comment fields, do not use Mobile Performance Review (Phase 1).

If Mobile Performance Review Phase 1 is enabled the following will occur:

- Text, which has been formatted using the RTE on the web and is edited in the mobile application, will lose formatting in the web and in mobile. Only HTML tags will be present.
- Text, which has been formatted using the RTE on the web and is viewed in the mobile application, the text will be displayed without formatting.

22 Data Protection and Privacy

22.1 Data Protection and Privacy Content is Centralized

Please go to the central data protection and privacy guide for suite-wide information about our data protection and privacy features.

Data protection and privacy is best when it is implemented suite-wide, and not product-by-product, so we centralized data protection and privacy information content. Please see the latest data protection and privacy content for information about setting up and using data protection and privacy features.

Note

SAP SuccessFactors values data protection as essential and is fully committed to help customers complying with applicable regulations – including the requirements imposed by the General Data Protection Regulation (GDPR).

By delivering features and functionalities that are designed to strengthen data protection and security customers get valuable support in their compliance efforts. However it remains customer's responsibility to evaluate legal requirements and implement, configure and use the features provided by SAP SuccessFactors in compliance with all applicable regulations.

Latest setting up and using data protection and privacy content

Latest data protection and privacy release information

22.2 Data Retention Management Options

Identify which data purge function in the *Data Retention Management* tool meets your data protection and privacy requirements.

The *Data Retention Management* tool supports two different data purge functions: the newer data retention time management (DRTM) function and legacy non-DRTM function.

Remember

As of Q1 2018, all customers are encouraged to stop using the legacy purge function and start using data retention time management (DRTM) instead. Data retention time management (DRTM) is a new data purge solution that offers more complete coverage across the HCM Suite and the ability to configure different retention times for different types of data and different countries.

To get started using this and other data protection and privacy features, please refer to the guide here.

If you already use the legacy data purge function as part of your current business process and you are sure that it meets your company's data protection and privacy requirements, you can continue to use it, as long as you aware of its limitations.

Restriction

Please be aware that our legacy data purge function may not meet all of your data protection and privacy requirements. It does not cover data across the full HCM Suite and does not enable you configure data retention times.

In the longer term, we recommend that you also consider adopting the newer solution. In the meantime, to use legacy data purge, please refer to the guide here.

23 Troubleshooting

This section provides helpful hints and solutions to the various issues that you may encounter while setting up, configuring, launching, reviewing and working with Performance Management v12 Acceleration form.

23.1 Troubleshooting Form Templates

Please see the following article in the SAP One support launchpad for more information on troubleshooting form templates:

https://launchpad.support.sap.com/#/notes/2076088

The SAP One Support launchpad provides a wealth of information in the Knowledge Base articles. Search for Performance Management.

23.2 Errors Encountered While Opening a Form

Common errors encountered while opening Performance Management forms.

Errors

Errors encountered by the users while opening a form:

- When routing the form the user is redirected to the home page
- "An application error occurred. Please try again later, or notify support if the issue keeps occurring."
- A form loads only partially and is cut off at some random spots
- Form appears blank and does not resemble the form launched for other users
- The form appears strangely formatted with tables broken or nested incorrectly
- The content that should be within a goal shows up in the wrong place
- Form stops working
- Various JavaScript errors displayed (you will see a yellow alert triangle bottom left of browser)

Causes

The following are the most common causes for the errors listed in this section:

- User cut and pasted some formatted text into their goal plan or PM form that is corrupting the form
- A goal with bad data (usually HTML, Bullets, or MS Word formatting) was cascaded to many users which in-turn is now pulled into PM form corrupting it
- A competency with bad data (usually HTML, Bullets, L or MS Word formatting) has been given to the user
- MS Word is an HTML based program. When you copy and paste text from MS Word, you are actually copying a version of html, even though you never see that raw code. When you paste that into your form, you are essentially pasting into our xml code, a random block of html, which may not have fully formed syntax. Therefore, your partial code breaks the form, since it is being displayed into a web browser that can only work with properly formatted html code. While the SuccessFactors application does have built in capabilities of handling this code, it is not possible to handle every possible scenario, so while errors will not typically occur every time someone pastes content into their forms, there will be times when this will break the form.
- When fields are not configured correctly. For example, if you have a field set as required, but have then hidden that field from the user at some previous step the form will not open.

Solution

In first three causes listed above you can typically determine whether any of them are probable causes for the error without even engaging Customer Support.

Engaging engineering to resolve your corrupted form is rarely the best or reasonable option as this process can take some weeks. It is much quicker to first try relaunching a fresh form to confirm it was not an isolated issue. Additionally, even if engineering is able to identify the root cause, most often the solution proposed is still a correction of the form config or data and relaunching. We will rarely attempt to fix code on live forms due to the risks this can pose, causing data loss or further issues with the form.

SAP Cloud Support can help you perform the series of tests via a webex quickly. To perform this tests contact SAP Cloud Support.

Checks to test if the form is working correctly

Perform the below checks to test whether the form is working as expected.

Did the form ever work for anyone?

If you have just created this form and are testing, or you failed to test and now users have broken live forms, then this may be a due to an incorrect configuration.

- We recommend you to go back to the last year's form, launch a form for one of the affected user, and check if the same error appeared in your last known working version of the form.
- If you do not see the same error in your previous year's form, then possibly the new form template has been configured incorrectly. Here are the possible reason:
    - It references competency ID's that existed in test but have a different ID in production.

- There are more serious xml, or HTML issues. Remove any HTML or formatted text you have added to your template. (typically in the instructional text areas).
- Last year's goals were different and only your new years goals have bad data in them.
- Last year's competencies were different and only this years competencies had special formatting or links added to them casuing this issue.

- If however you do see an error now occurring when launching last year's form, then contact SAP Cloud Support. Your template may have some older code that is no longer passing validation and needs to be updated.

Does the form work for other users, a single user, or just a few users?

- If Yes, then the user has added or copy pasted some bad html or text into their PM form comments, and or goal plan.
- Your first action should be to launch a fresh copy of the form and see if there are any errors.
  - If you don't see the same error in a fresh form then you can be sure that the user has added some bad data which corrupted the form. At this point instruct the user to use this new form and make sure they do not paste any data from Word, excel etc. Ask them to add plain text to avoid repeat of the issue. See the section below on how to sanitize text.
    If you do see the error right away in new form: then maybe the bad data is coming into the form upon launch from their goal plan or competencies.
  - We recommend you to contact SAP Cloud Support to enable the feature *Rich text editor gives confirmation cleanup on text pasted from MS-Word* for their instance. This feature works with Performance Management forms and will eliminate most of the issues introduced by the users pasting bad data into text fields.
- Check the users' goal plan, and remove the goal data that was added just prior to impacting the form that has special characters pasted from word, excel etc.

> **Note**
>
> If this was a goal cascaded to many users then they also may be seeing the same error in their forms.

- Does this user have a competency unique to them? Check competencies and make sure you didn't add html formatting, links or other special formatting (such as bullet points etc) within the competency. If it is bad data in the competency then you first have to update your competency library. Remove any HTML, links, bullet points, and any other special formatting you added, then relaunch the person's form. Check to confirm the error is gone in a relaunch.

> **Note**
>
> If other users were given this same competency then they will also see the same errors.

Is this affecting many users or all users?

If this affected many users (and in some examples all users) then this could still be the same issue, but on a larger scale, simply because all the affected users have been given the bad goal or competency.

- Closely review your forms paying close attention to the data being pulled into the form.
- Check whether they all have something in common such as getting the same goal or competency.
- While checking goal data look for any bad HTML, bullets, or formatted text that was pasted in from word, excel etc. If that was done and cascaded to all users, then this goal data will need to be removed. Once removed, check your Performance Management form and confirm if the error is gone.
- Check your competency library and make sure you have not added special formatting, bullets, html etc that is corrupting the forms they appear on.

- Check whether the Performance Management form contains a goal plan or learning activity plan that the user has not been granted permission to. Also, check the goal plans which are included in the Performance Management Form XML, and ensure the impacted user has permission to these goal plans.
- You will need to fix competency data and relaunch the forms.

The user, or the admin should first correct the bad competency or goal data, and relaunch a fresh form. Trying to fix the corrupted forms is high risk, and SAP Cloud Support will not attempt to fix code in live forms for these types of errors, due to the high risk of losing data.

If the above information does not help you to find the root cause of the issue, then contact SAP Cloud Support, they will engage engineering to determine root cause.

Sanitizing content pasted into your forms

Go to *Admin Center* > *Company Settings* > *Company System & Logo Settings* and enable *Sanitize all rich text inputs*.

When users copy and paste information from word or other programs, it can contain bad html code and the system may not support the format. This in turn when pasted into your form can break your forms. This feature helps prevent that from happening by stripping out bad data we detect.

Contact SAP Cloud Support to enable "Rich text editor gives confirmation cleanup on text pasted from MS-Word" for their instance when you use RTE.This feature works with Performance Management forms and will eliminate most of the issues introduced by people pasting bad data into text fields.

When a user copies data from Word, Excel or some other webpage and pastes it into their review, it can contain bad data and cause forms to break or behave incorrectly.

While the SuccessFactors application does have built in capabilities of handling this code, it is not possible to handle every possible scenario, so while errors will not typically occur every time someone pastes content into their forms with the above options on, there will be times when this will break the form.

When this occurs the user can "sanitize" this by trying the following steps:

1. Copy the content as they originally did (usually from Word, Excel, a webpage or some other program)
2. Paste the content into Notepad. Notepad is not an html based editor like MS Word or Excel, it will 'sanitize' this by stripping out all hidden html and converting it to truly plain text.
3. Now from Notepad once again select and copy your text .
4. Go to your goal or Performance Management form and paste this plain text in the comment field and click *Save*.
5. Reopen the form and confirm that the form now loads properly.

> **Note**
>
> Some of the forms may have become so corrupted that only starting from a fresh form will enable you to work with the form. In such cases you or your admin may need to launch a fresh copy of the form.

Misconfiguration of Required Fields

- Cases where the form worked at some steps for some users, but when routed to next step it could not be opened and just kept loading/spinning could indicate a possible conflict of permissions set for required fields for the person trying to open the form.
- contact SAP Cloud support so that they can review your code to check if there is a misconfiguration and conflict of role permissions for a field.

Here we see that the section comments are a required field for all people at all steps. So if you have hidden section comments at any step a conflict is caused as they are required.

```
<required-fields>
<role-name>*</role-name>
<field refid="section-comments" min-value="-1.0" max-value="-1.0"/>
<route-step stepid="*"/>
<send-action sendid="next_step"/>
</required-fields>
```

> **Note**
>
> You would need to change the permissions so that it is only required at specific steps and where the required roles can access the field.

3rd Party Security Software

- It is also possible that agressive URL scanning (also known as URL filtering) by 3rd party security software your users may have installed on their systems is interfering with the display and operation of SAP SuccessFactors pages. Nortons, McAfee, Kaspersky, and other security software could be scanning our URLs and pages for javascript applets, malware, malicious code, and actively stripping out pieces of html causing issues for your end users. This is also called sanitizing the webpage html.
- The SAP SuccessFactors product does use javascript and applets, and if these are not allowed to run correctly then pages can fail to load, and URLs, buttons and other navigational tools can fail. Work with your IT to ensure our sites are whitelisted and added to any trusted site lists.

23.3 Troubleshooting Form Transfer Options

This solution focuses on troubleshooting document transfer issues.

> **Note**
>
> Many other possible causes exist beyond incorrect transfer options as to why a form fails to get transfer. Refer "Error Encountered While Launching Forms" section and ensure all your template and import settings are correct.

Support for EM and EX Manager Roles Only:

> **Note**
>
> For the following settings the term "Manager" only refers to the (EM or EX) direct manager (or first level manager).

Support for EX Role: You now have the "Enable Matrix Manager Document Transfer Support" option to specify how you want to manage forms when there is a matrix manager change (EX role). Previously, you could only specify the settings for hierarchical managers. To use this option, contact SAP Cloud Support.

Note

It does not apply to other manager roles such as second level manager (EMM), or other manager roles. (EH EA EC etc.)

Impact: This means for example, if a form was in the Inbox of a second level Manager (EMM) or HR Manager (EH), and you selected *Automatic Inbox Document Transfer To New Manager*, the form will REMAIN with the current holder, and will not be transfered to the new manager, as the form is NOT in the Inbox of the 'Manager' as the feature indicates it applies to. You will however still see the new manager update in future steps if the route map contains a future EM or EM Signature Step.

Common Causes Preventing Transfers

There are a number of reasons that documents may not transfer as expected to a new manager. Often it is difficult to determine the root cause, as you likely only become aware of the failure after the fact, and therefore you are unlikely to have known, or be able to determine, which of the following conditions existed or occurred at the exact time the transfer was performed.

When making a change via Employee Profile EM or EX field: While making manager changes manually via *Admin Center* > *Employee Profile Portlets*, and direclty editing new direct manager or first level manager (EM or EX) user names you need to also set the transfer options in *Employee Files* > *Automatic Manager Transfers*.

When doing a manual import: The administrator had not realized that the required transfer document checkboxes were not selected, or that they conflicted with the transfer options on a specific template. The most common cause is during a manual user import as NONE of the forms transfer options are selected by default. You need to set these when importing the employee file. The system will send a confirmation email to the person executing the import, and in that email, there will be a confirmation of the settings used for the import, so it is possible to determine if this was the cause by contacting the person that receives this email.

Form Template Level Settings Conflict with Import Settings

Go to *Admin Center* > *Form Templates Settings* and set the Automatic Transfer Options that you want to occur for that specific template when you perform the import. These template settings apply at the time of the import/ transfer, ONLY if they match the setting selected in the Employee Import.

Note

There is no option to override the settings set at the template level on the import screens.

Examples of Conflicts between Form Template Settings and Import Settings)

Whether you use FTP import, Employee Import via Admin Center, or Document Transfer via Admin Center, always remember that the Automatic Manager Transfer settings **set at the form template level** must match those used in the import options. The options on the import screen or document transfer will not apply to forms where the template settings differ and may therefore cause unexpected results.

Impact: You have four form templates, all with different Automatic Manager Transfer settings set. In the import options you cannot possible make the settings match all 4 form templates, so only those templates that match the same settings on the import will apply.

Challenge: The employee whose manager is changing may also have all four different form types in-progress, so if the administrator executing the import was expecting that all four forms, or all the forms that anybody might have, were going to transfer uniformly based on the one set of import settings, then they may be surprised to see unexpected results for some of the forms.

Forms Stuck with System System

Forms appear to be stuck with "System System".

> **Note**
>
> This is the user account all automated transactions are logged against. Typically it is not physically with "system" but with the inactive user or old manager. Check the inboxes of the old managers, previous users, inactive users as it will be with one of them.

Examples of Conflicts between Form Template Settings and Import Settings

Check your FTP or User Import settings and Form Template settings in *Admin Center* > *Form Templates Settings* > *<Form>*

Example 1: The form will not get transfered if the below listed document transfer options on the import are checked, but only option 4 **Automatic Completed Document Copy to New Manager**is checked on the form template.

1. Automatic insertion of new manager as next document recipient if not already
2. Automatic Inbox Document Transfer To New Manager
3. Automatic En Route Document Transfer To New Manager
4. Automatic Completed Document Copy to New Manager

Example 2: Case 1: *Do Not Transfer Documents* is checked on the Template even though on the Employee Import screen or FTP import setting you have *Automatic Inbox Document Transfer To New Manager* enabled, this is not going to apply for any template where you have *Do Not Trasfer Documents* set.

Result: Documents will not get transfered.

Case 2: *Do Not Transfer Documents* is not the same as the **Change Engine**, so it will not prevent all future manager steps from updating to the new manager. It will just prevent the form from moving from the current stakeholder until that person manually moves it on.

Result: Documents will not get transfered.

Example 3: The below listed document transfer options on the form template are checked, but when doing an Employee Import, none of the document transfer settings there are checked.

1. Automatic insertion of new manager as next document recipient if not already
2. Automatic Inbox Document Transfer To New Manager
3. Automatic En Route Document Transfer To New Manager
4. Automatic Completed Document Copy to New Manager

Result: Documents will not get transfered.

Example 4: User Import document transfer options 1 and 2 are checked on the Employee Import page, but the radio button for **Do not transfer documents** is selected on the form template.

1. Automatic insertion of new manager as next document recipient if not already
2. Automatic Inbox Document Transfer To New Manager

Result: Documents will not get transfered.

Example 5: User Import document transfer options 1 and 2 are checked on the Employee Import page, but only options 3 and 4 are checked on the Form Template page.

1. Automatic insertion of new manager as next document recipient if not already
2. Automatic Inbox Document Transfer To New Manager
3. Automatic En Route Document Transfer To New Manager
4. Automatic Completed Document Copy to New Manager

Result: Documents will not get transfered.

Updating Settings on From Templates:

Settings are dynamic, so a change to your template settings after forms have been created will apply to existing forms.

Example of the impact:

- Performance Review forms exist for 10 employees.
- The Form Template has the *Do Not Transfer* setting checked.
- Forms are then launched based on that setting.
- The Form Template is then changed so that document transfer options are checked.
- The Employee Import is run and all five employees have new managers.

Result: Although the forms were initially launched with *Do Not Transfer* checked, forms will be transfered based on the current template settings for the forms that the five employees still have in progress.

Other Common Causes Preventing Transfers

- **FTP Imports**:It is possible that your automated FTP import settings have not been correctly set. This is not a likely cause if your settings have been in place for some time, but if you have recently set up an automated FTP import, and have only now discovered that forms are not transferring as expected, open a case with SAP Customer Support and ask them to validate that your FTP user import settings are set as you require.

- **Employee Change Engine**:
  - You may have employee change engine settings set to prevent documents from transferring. To check these go to *Admin Center* > *System Properties* > *Change Engine Configuration*.
  - When using the Employee Change Engine, *Manager Transfer Settings* on both the form templates and the FTP settings need to be 'unchecked' so that the change engine can effectively lock forms to the old manager. Unexpected results may occur where Change Engine is on and where the transfer settings were not unchecked on the import method used.

> **Note**
>
> It is not always possible for SAP SuccessFactors to go back and determine why a form failed to transfer to the new manager. The product does not currently have an audit trail of all changes made that includes an exception report showing why it stayed with the old manager. If all other forms are moving as expected, and only a few exceptions occur on occasion, then one of the considerations above is likely.

23.4 Troubleshooting Mass Form Routing and Regrouping Individual Forms

How to regroup individual forms that were launched individually so that these forms can be mass routed all at once?

Solution: For the forms to be mass routed, they should be mass launched. If the forms were launched individually, then they cannot be mass routed until they are re-grouped.

For example, if 20 forms are mass launched, this means, those 20 forms can be mass routed, but if they are launched individually then it will not be possible to mass route them.

Mass Move Individual Forms

- Make each owner of the form responsible for moving their own form. It is the responsibility of the person who has the form to take action and route it.
- Have administrators move forms via admin tools 1x1. On average 1 admin can route 100 forms an hour manually.

  > **Note**
  >
  > SAP Cloud Support will not move forms for customers and their end users. They don't have any tools or backend options to mass move forms and cannot be responsible for logging into instances to move forms as

this causes audit issues. Customers, end users or admins need to complete forms using standard product functionality for routing forms.

- **Enhancement**: Please add your voice to enhancement request to enable mass routing of forms that are not part of a group via a csv import file: http://community.successfactors.com/t5/Performance-and-Goals-Ideas/Adjust-feature-Route-documents-for-mass-routing/idc-p/100452#M3956

Forms that were once launched at same time are no longer in the group, why?

Tips To Prevent Forms From UnGrouping:

- In future cycles set up your route map with auto routing dates to automatically move forms to next step after a certain cut off date so that no manual work is required for anyone failing to move their forms.
- Rather than have employees or managers create their own forms individually, consider if they can all be launched all at once by your administrator.
- Admins should limit how many forms they manually modify, as this will remove the form from the group.
- Do not use the option *Automatically Insert New Manager As Next Recipient If Not Already*. Not only is that option often not needed, it also removes the forms from groups when the new step is added.
- Do not use User steps (U Steps) in the route map if possible as these will be treated as individual forms.
- Forms routed back from signature or completed will no longer be part of a group.
- Do not have support run any custom fixes to your forms (scripts) as this will break the group integrity and typically result in the entire group becoming individual forms.

Re-Grouping Forms:

- You can route the forms individually or you can open a support ticket to request these be regrouped for mass routing. The information below also highlights the limitations of grouping forms. Forms can only belong to a group when they all meet the criteria below.

  Note

  This is a custom request. As it is not standard supported functionality in admin tools and requires special actions from provisioning please set expectations for 1-2 week turnaround.

Dependencies

- Will only work on forms that were created after B1207
- The mass route option requires that all forms belong to a mass launch group or batch
- The mass merge form batches tool requires that all forms:
  - Are based on the same form template
  - Have exactly the same route map steps & information
  - The route map history id is same
- Any forms not meeting that criteria cannot be regrouped and included in a mass route since they no longer have the same structure. You must move these 1x1. SuccessFactors will be unable to route these for you in any custom way.
  - This includes any forms that have had manager changes where you use "Insert New Manager as Next recipient" option as that inserts an additional U step
  - Any form routed back out of completed. These also will have an extra U step inserted

- ○ Any form your admin manually adds or removes a step
- If your forms meet the above criteria then SAP Customer Support can regroup the forms for you. Contact SAP Customer Support to have your forms regroups. This typically only takes a few days, but please allow up to two weeks to complete. If you need this done sooner, please open your case and then use the standard escalation process.
- Support will notify you once the forms have been regrouped and then you will be able to go to admin tools and mass route all the forms now belonging to the group.

Considerations

- You might notice more than one group created if forms had different route maps. Also, any forms not meeting the criteria will remain as individual forms and you will now need to manually route these one by one. You can identify which step forms are at by using regular reporting tools for this.
- Risks: There are no risks using this tool as it a standard provisioning feature. The only impact is that it will add a batch ID to all forms that meet the above criteria.
- A specific template cannot be selected to merge the forms. This will run for all forms.
- For clients with extremely large numbers of forms, performance may be impacted while the process runs, therefore this is something that should only be run only when absolutely needed.
- Consider asking for it to be run overnight. For clients with 10,000 users or less this is probably not something to worry about and can be run anytime without impact.

For instructions on using Mass Route please see"Mass Routing of Forms Using CSV Upload".

Partners & Support Actions to Regroup Forms

> **Remember**
>
> As a customer, you do not have access to Provisioning. To complete tasks in Provisioning, contact SAP Cloud Support.

- To execute the grouping of forms for clients contact SAP Cloud Support to create a scheduled quartz job via *Provisioning* > *Company Settings* > *Manage Scheduled Jobs* > *Create New Job*. The job type should be *Merge form batches job*. The *Job Name* and *Job Owner* fields should be populated. Populate the *Job Occurrence & Notification*" section, click on the <*Create Job* button.
- **Considerations**: System will process all forms/templates. You can't select to merge a specific template.This should not be problematic for any client scenarios as the group or batch is only used when and if an administrator wanted to process forms in bulk, therefore having this group generated will only be beneficial.

What Needs to Be the Same?

Basically, your form templates and route maps for all forms need to be exactly the same to regroup them.

But to be more specific if any of the below fields in routing map contains different values for the forms, their route steps are different and they will not be able to be regrouped in batches.

- Localized Step Name
- Localized Step Description
- Localized Step Introduction & Mouseover text
- Localized Step Name After Completion
- Localized Exit Button Text
- Localized Step Exit Text
- Step id
- Step mode
- Start Date
- Exit Date
- Due Date
- Enforce start date
- Automatic send on due date
- Step Type
- Specific user for U step
- Role for single step
- Entry User for I step
- Exit User for I step
- Roles for I step
- Localized Iterative Button text for I step
- Exit User for C step
- Roles for C step
- Step order
- Step count
- Localized Step Name of Completed step
- Localized Step Introduction & Mouseover text of Complete step
- CC Roles Upon Completion
- Reject Button Mouseover Text

23.5 Reasons Why Forms Fail to Launch

Most common causes why forms fail to launch.

When a form fails to launch, you would receive an e-mail explaining the reason of the failure. Here's the list of some of the most common causes:

Issue	Symptom	Solution
Forms are not showing up in the user's inbox	Performance Review forms that are sent to the user, does not appear in the user's inbox.	Check if the problematic users have system logon permission.
A new step "Alternate Route User Step" gets created while launching the form	When you launch the form for a user who doesn't have the basic authorization and the permissions to logon, an "Alternate Route User Step" gets created and the form gets routed to the originator's inbox.	You should give the necessary permissions to the user and re-launch the form.
Users are not active or not in Default User Group	New users, or users with recent manager changes or after data changes would fall under this category.	Check whether the user is active. If the user is active relaunch the form. Check if the user is in the Default User Group. Every active user must belong to a Default User Group to be able to log in to SAP SuccessFactors. To to grant default user group permission: Go to *Admin Center* > *Manage Security* > *Default User Group permission* > *Grant permission to the group* If the user is inactive, go to *Admin Center* > *Manage Users* > *Set User Status* to Active.

<table>
<tr><th>Issue</th><th>Symptom</th><th>Solution</th></tr>
<tr><td>Form has invalid hard coded competency</td><td>Codes that have either been deleted from library or were IDs from test, not production.</td><td>Open the affected template from Provisioning > Form Templates, and save it.

Remember
As a customer, you do not have access to Provisioning. To complete tasks in Provisioning, contact SAP Cloud Support.

If there are invalid items in the XML then an error is returned at the top of the page.

Note
It fails for everyone since it's hard coded onto the form.

Also, relaunch the form after fixing the code.</td></tr>
<tr><td>Excessive Field Data</td><td>Your goals, competencies, and other custom fields have design limitations as to how much data can be stored in these fields. Ensure that employee data that may have been entered in any area does not exceed the design limitation for the form.</td><td>Note
If the goal happened to be cascaded to large numbers of people then you could see broad failures. However, if it is one person or a few people who are entering invalid goal names, then it becomes tricky to determine the root cause.</td></tr>
</table>

Issue	Symptom	Solution
Invalid Goal Data	You have custom code, java script, CSS and HTML in your Goal plan	• Make sure end users have not cut and pasted Microsoft word information into goals. The cut and pasted information would contain HTML that can impact proper functionality of the product. If users have entered formatted text, copy it to a notepad, and then paste it back as plain text to remove all word formatting. • Sometimes end users incorrectly use the *Goal Name* field. Make sure you enter a short goal *Title* and use the goal *Description* field for detailed information. Entering detailed information in the goal title would lead to invalid use of this field and the form would fail to launch. ◦ Ensure that the goal titles are short and not more than 2000 characters/bytes. ◦ Ensure that the goal descriptions are short and not more than 4000 characters/bytes. **Note** In case of single byte languages 4000 bytes is around 4000 characters as each byte take up one character. For example, English, French, Italian, and so on. However, for multi-byte languages 4000 bytes is not always equal to 4000 characters. Each character in multi-byte languages can take up to 2 to 3 bytes. This reduces the 4000 bytes count to 1300 characters approximately. For example, Chinese, Japanese, and so on.

Issue	Symptom	Solution
Invalid Form Sections	The Performance Management Form has sections that were not configured correctly.	Open the affected template from *Provisioning* > *Form Templates*, and save it. **Remember** As a customer, you do not have access to Provisioning. To complete tasks in Provisioning, contact SAP Cloud Support. If there are invalid items in the XML then an error is returned at the top of the page. **Note** It fails for everyone as there is an invalid section in the form. However, it might work for some, when the XML issue is impacted only by specific user data.
Timing of User Imports	• Forms fail to launch due to timing issues. • Random failures that seem to have no logical explanation. Though it works most of the time, but sometimes the forms fail to launch for groups of people. At other times it fails for individual users.	

Issue	Symptom	Solution
Invalid Route Map	• Form fails to launch for all the users: If in the first step of the route map, all the users do not have a valid role assigned. And also the person to whom this role has been assigned does not exists. • Form fails to launch for a specific individual or group of people: If the specific user or the group of people do not have a valid role assigned. And also the person to whom this role has been assigned does not exists. • User exists but not present in the default user group and not having the correct permissions and the correct roles assigned.	• Check the route map, and ensure that there is valid role and the person exists, in the first step. • Also, check that no strange characters are used in your route map *Step Name*. • Contact SAP Cloud Support if the user is not in the Default User Group.
Invalid HTML and XML in your form template	Most of the time the form would fail to launch for everyone. However, due to the nature of HTML, it is not impossible that for some it might just work. It all depends on how the break in the HTML manifests itself.	1. If you have reconfigured your templates then revert back to last known working copy. 2. Confirm your old template still works and can launch a form. 3. If it does then copy this template and make careful edits so as not to break functionality. Refer, Supported HTML for Performance Management v12 Acceleration Forms [page 47] for proper formatting of HTML for Performance Management v12 Acceleration forms. **Remember** As a customer, you do not have access to Provisioning. To complete tasks in Provisioning, contact SAP Cloud Support.

23.6 Troubleshooting Errors Encountered in Required Fields

Common errors encountered while setting, configuring and using required fileds in the Performance Management form.

23.6.1 Required Fields not working in Performance Management and 360 Multi Rater Forms

When you open a form and try to move the form to the next step without filling the required fields, your form will be sent to the next step in the route map. You will not be prompted to fill in the details for the required fields before submitting the form.

Context

Ideally, you should not be able to move the form to the next step without filling the required field details.

This issue is caused when *Version 10 UI* is not enabled in Provisioning.

> **Remember**
>
> As a customer, you do not have access to Provisioning. To complete tasks in Provisioning, contact SAP Cloud Support.

Procedure

1. Go to *Provisioning* > *Company Settings*.
2. Clear the *Version 12 UI framework (Revolution)* and *Version 11 UI framework (ULTRA)* options and click the *Save Feature*.
3. Select the *Version 10 UI* option and click *Save Feature*.
4. Check on *Version 11 UI framework (ULTRA)* and click the *Save Feature*.
5. Check on *Version 12 UI framework (Revolution)* and click *Save Feature*.
6. After completing the above actions, logon to the application and go to *Admin Center* > *Form Template Settings*.

   Open the form template and confirm whether the *Legacy Workflow Routing*option disappeared from the page.

   > **Note**
   >
   > You can try to route the form after the *Legacy Workflow Routing* option disappears from the *Form Template Settings* page.

Results

When you try to move the form to the next step without filling the required field, you will be prompted to fill in the details for the required field before submitting the form.

23.6.2 Performance Management Form does not Validate the Required Field Permission

When you try to move the form to the next step in the route map without filling the required fields correctly, your form will be sent to the next step in the route map.

Ideally, you should not be able to move the form to the next step without filling the required field details correctly.

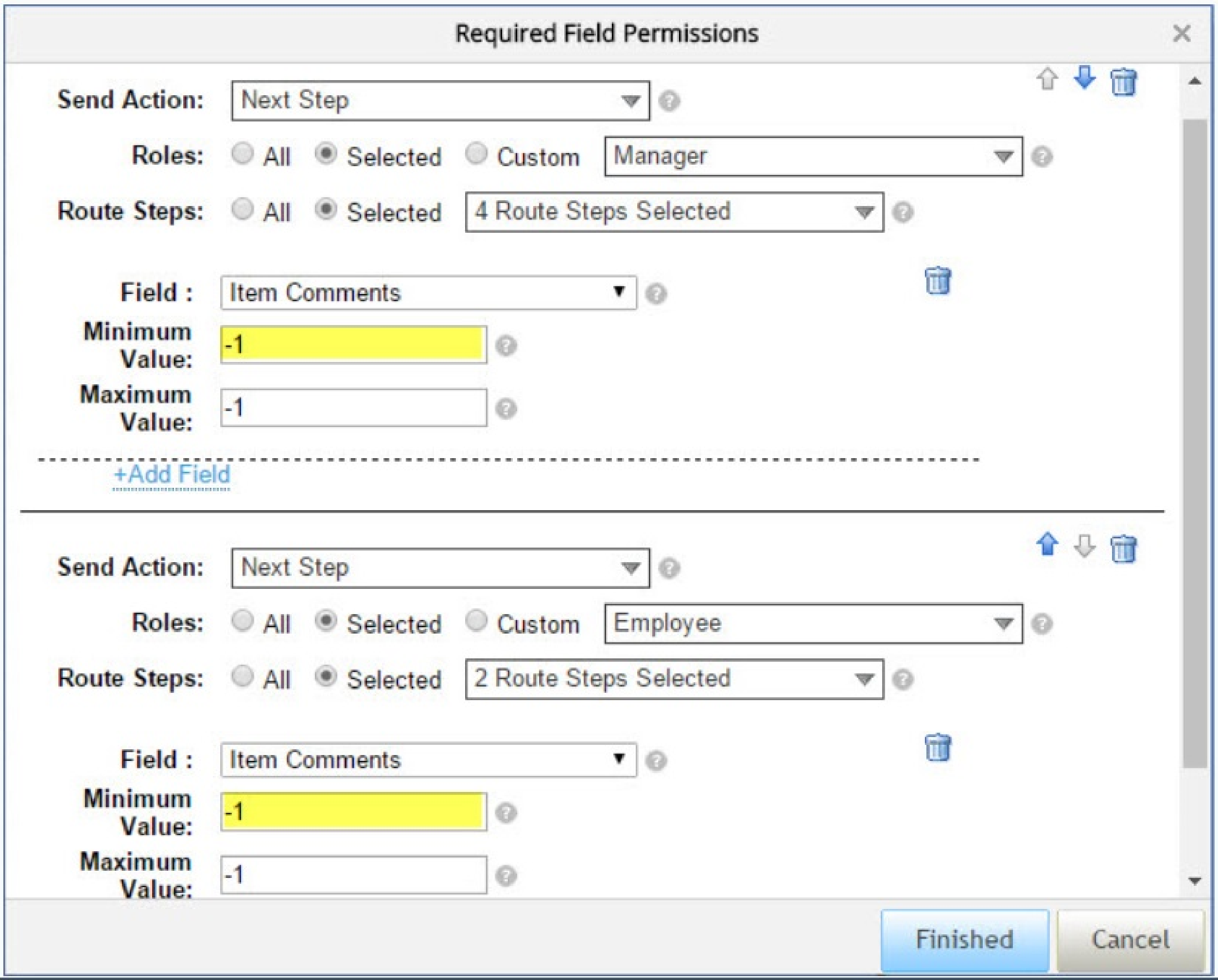
Scenario

When you set the required fields in a Performance Management form, and try to send the form to the next step for validation after launching the form, the Performance Management form does not validate the required field permission.

Cause

The form is allowed to move to the next step and bypass the required field permission as the minimum value for the Required Field was set to -1.

> Note
>
> After the value is set to -1 it will bypass the required field permission and will accept 0 character.



Solution

Modify the Performance Management template and change the minimum value from -1 to 1.

> **Note**
>
> These changes will not reflect on all the Performance Management forms that were already launched. This will only apply to the newly launched forms.

23.6.3 Required Field Permission Issue for Iterative Step

Required field permissions do not work when form is routed within the Iterative step in the route map. However, required field permissions work when sending form to the next step.

Scenario

Let us consider an example where the route map in the Performance form has an iterative step between the entry step, Employee, and the exit step, Manager, and the goal and competency ratings fields are configured as mandatory. In such a scenario when you logon as an employee, open the Performance form, and try to send the form to the manager without filling the mandatory fields, the form is successfully routed without any warning or error message.

When you logon as a Manager, open the form, and try to send the form to the next step without filling the mandatory fields, an error message prompting you to fill the mandatory fields appear.

Cause

- Incorrect configuration of the Performance form in XML.
- The required field permission has been configured only for sending the form to next step and not for routing the form within the same step.

Solution

- The configuration of the Performance form in XML should be corrected in Provisioning.
- The following permission for required fields works only for sending form to next step:

  Sample Code

  ```
  <required-fields>
        <role-name>EM</role-name>
        <field refid="item-rating" min-value="-1.0" max-value="-1.0"/>
        <route-step stepid="*"/>
        <send-action sendid="next_step"/>
      </required-fields>
  ```

  The following permission needs to be configured using XML in Provisioning for making the required field work in Iterative step as well:

  Sample Code

  ```
  <required-fields>
        <role-name>EM</role-name>
        <field refid="item-rating" min-value="-1.0" max-value="-1.0"/>
  ```

```
        <route-step stepid="*"/>
        <send-action sendid="inner_step_send"/>
    </required-fields>
```

Remember

As a customer, you do not have access to Provisioning. To complete tasks in Provisioning, contact SAP Cloud Support.

23.6.4 Error when querying Performance Related API entities

A user sends a SOAP Request to Successfactors API from various tools such as BOOMI, SAP PI, SOAP UI, or any other tool and gets "Insufficient Permissions" error message in SOAP Response.

Symptom	Cause	Resolution
While trying to query only the Performance-related entities, API returns "SFAPI Domain" and "Insufficient Permissions" error	This error message comes due to Insufficient Permission granted to SFAPI user used for querying the various Performance entities.	To resolve this issue, assign necessary permissions to the SFAPI user. Go to *Admin Center* > *Manage Permission Roles* > *[Permission Role]* > *Permissions* > *Permission settings* > *Manage Form Templates*, and grant *Export Performance Management Form Data* permission, by selecting the checkbox next to the permission.

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