SAP SuccessFactors ♡

Implementing and Managing Calibration

THE BEST RUN **SAP**

Content

Change History

Learn about changes to the documentation for Calibration in recent releases.

1H 2023

Type of Change	Description	More Info
New	You can now view calculated ratings of employees for Performance rating elements in the List view of a calibration session.	Managing What Users See in the List View [page 37]
New	You can now access an employee's Growth Portfolio from the talent card with proper permissions and settings.	Configuring Calibration Talent Card [page 47]
New	You now have six more filter options to narrow down employees to be displayed in a calibration session.	Defining Default Filters in Admin Center [page 74] Filter Options [page 18]

2H 2022

Type of Change	Description	More Info
New	You can now remove subjects from all calibration sessions, including the sessions that are already in progress or those that have been activated. With this, you can manage individual employees' calibration information on a session basis.	Removing Subjects from Calibration Sessions [page 50]
New	When you finalize multiple sessions at one time, guideline enforcement is now supported in three more guideline scenarios: • More than one rating is included in a guideline. • An operator other than "=" is configured in a guideline. • Not all ratings have a guideline. The related note about the restrictions has been updated.	Performance [page 23]

Type of Change	Description	More Info
New	Gender indication in Calibration views has been redesigned. With the adoption of the 5 pre-defined gender values, each gender value is now indicated by an icon and color.	Calibration Views [page 31]

1   Overview of Calibration

Calibration is the process that organizations use to compare and potentially adjust the ratings of their team members to ensure that performance levels are standardized across the organizations.

The calibration process provides an opportunity for managers across an organization to learn to use the same language for comparing and sharing an understanding of the competencies and expectations of employee behavior. Depending on company process or strategy, calibration can be part of a performance review process, a talent review process, or a compensation review process.

What Is Calibration?

At a basic level, SAP SuccessFactors Calibration is a tool that helps managers visualize how to distribute their team ratings objectively or plan decision, and to facilitate discussion about decisions. Your basic initiative with a calibration process is to allocate ratings that are fair and objectively distributed back into the source from which it came so as to carry on with fair data in the rest of the talent management cycle.

The Calibration provides one system that gathers **Performance**, **Compensation**, **Succession**, and **People Profile** data. It seamlessly integrates to update this data automatically in its original source. A unified interface offers flexibility in bringing all or some of these factors together for discussion in the business. It transforms calibration into a simple and streamlined process that enables you to calibrate ratings and pay across your organization, and view, compare, and adjust all ratings and pay as needed.

Characteristics of Calibration

- Inclusive: You can select from four different data sources to calibrate ratings and configure sessions with dynamic groups of individuals.
- Flexible: Calibration can act as a standalone activity, or it can be embedded in your talent management cycle.
- Visual: Managers and HR business partners can see where there's a bias and what the recommendations are to fairly rate employees.

Benefits of Calibration

- It offers managers the opportunity to bring "hard" and "easy" graders in line with their peers to improve the consistency and overall fairness of performance reviews.
- It allows managers to view data for various teams and discuss selected ratings.
- It teaches managers to use the same language as one another, and to share understanding of competencies and expectations of employee behavior.
- It allows facilitators to change ratings based on the outcome of the calibration session.

- It establishes a common and well-understood definition of performance across the company.

Business Cases Not Covered by Calibration

The following business cases aren't covered under Calibration:

- Managing incumbents and succession planning: This is done in the SAP SuccessFactors Succession tool.
- Using the user interface to drive discussions and decisions without making rating changes: The UI is for facilitating discussions about the ratings and changes made in Calibration are designed to write back directly to the source of data they came from.
- Calibrating Variable Pay or 360 Reviews data: Calibration only covers ratings in Performance, People Profile, Succession, and Compensation
- Calibrating ratings entered directly onto Compensation Forms, otherwise known as the "compRating".
- Calibration doesn't support normalization.Calibration isn't intended to be a reporting tool to make decisions about future plans with employees. It's intended to consolidate data from multiple sources (Performance Management, Compensation, Succession, and People Profile) into one session; provide an interface to both visually change rating data as well as launch a session to have conversations about a specific group of people; and write the data directly back to those same sources.
  For this reason, normalization of data doesn't make sense because Calibration isn't an analytic tool. Calibration is a visual and interactive tool that facilitates objectivity in talent management processes.
  When you're discussing data using Calibration and making changes, it's as if you're writing back to the original source, but you're doing so in a user interface that specifically helps you frame a discussion around being objective and open about the ratings you're allocating.

1.1 Basic Concepts in Calibration

There are four basic concepts in Calibration: roles, sessions, templates, and views.

Roles

Calibration roles describe who does what during a calibration session. Deciding who gets what role is determined when creating and launching a calibration session .

Role	Description
Facilitator	A facilitator is typically an HR representative, and a neutral person responsible for managing the session and ensuring that information required to calibrate employee ratings is available. Facilitators have access to read and edit the session, but don't necessarily have subjects in the session.

Role	Description
Co-facilitator	A co-facilitator is an HR person who cohosts or acts as a backup to the facilitator. Sessions can be created without co-facilitator.
Subject	A subject is an employee whose ratings are being calibrated.
Participant	A participant is a manager of the subjects being calibrated. Participants other than the direct reports of the owner can also be selected to participate in the session.
Owner	An owner is a manager of the participants. The direct reports of the owner are automatically made participants in the session, and the direct reports of the participants are automatically made subjects.
Executive Reviewer	An executive reviewer is typically a business or HR executive who doesn't necessarily have to be present for each calibration session. But they need blanket access to the data across all sessions for a given Calibration template used in a talent management cycle. Users who are assigned this role get direct access to the sessions as well as the Executive Review summary page.

Sessions

A calibration session defines the applicable timeline, as well as different roles in the session. A company can have multiple active sessions. Users can edit sessions you have already created. If you've already activated the session, however, you must deactivate it to make the changes. After the changes have been made, you can then reactivate the session.

Templates

A Calibration template defines the dates, roles, and forms for a calibration session. One Calibration template can be applied to multiple sessions.

Views

Calibration views provide users an at-a-glance overview of relevant performance management information:

View	Description
Dashboard	Provides a graphical and aggregate view of a specific session of employees who are being calibrated. The charts display either the number of subjects or the distribution in percentage

View	Description
List	Displays session data in a table
Bin	Provides bins or buckets that visualize one rating source for the subjects being calibrated
Matrix Grid	Plots two different rating sources against one another for a matrix placement of subjects; The view is also referred to as 9-box view and depends on the rating scale configuration.
Executive Review	Used when a senior HR or business executive requires an aggregate view of session activity and behavior. This roll up view of sessions is permitted by an administrator per calibration template and doesn't currently reside within RBP.

Calibration Sessions [page 10]

Calibration sessions define the set of people who are calibrated and the people who participate in the session.

1.1.1 Calibration Sessions

Calibration sessions define the set of people who are calibrated and the people who participate in the session.

A calibration session provides a specific holding place for managers and HR business partners (HRBPs) to navigate to change ratings, add comments, and review the outcomes of a given calibration cycle.

SAP SuccessFactors Calibration offers flexibility to accommodate creating sessions based on organizational hierarchy, or any custom set of individuals. Sessions are the combination of the how (template), the when (dates) and the who (Calibration roles).

> → Tip
>
> When you enable the SAP Fiori UI option for Calibration, you might find that the labels and icons on the header section of the calibration session are not clearly visible, as the background color of the header might no longer be in contrast with the color of the labels and icons. To fix this UI issue, go to ▶ *Admin Center* ❭ *Theme Manager* ❭, and select the theme you're using. Under *Edit Theme* on the left pane, go to ▶ *Fine Tune* ❭ *Placemat* ❭, apply a *Page title color* value that contrasts with the color of the icons and labels, and click *Save*. Mostly, updating the background color of the session header resolves the visibility issue for the calibration session header labels and icons.

Sessions are set up according to your company culture and processes. There's flexibility in who plays what role during the session, what they're allowed to do, and who is the subject of discussion.

> i Note
>
> Do not use special character "{" in calibration session filters. Otherwise, it might cause loading issue. It works fine if you've both "{" and "}" in a filter.

Roles Used in Calibration Sessions

Roles in Calibration are not the same as the roles created for Role-Based Permissions (RBPs), but are specific to and only apply to the calibration session you are configuring. When creating a session, you have control over who plays what role during that session:

- Facilitator: Who is running the session
- Co-facilitator: Who is their backup
- Owner: Who owns the overall session
- Participant: Who is providing input to the subjects
- Subject: Who is being calibrated
- Executive Reviewer: Which HR or business executives should have access to all session data for a given template

You can control the read, write, and finalize permissions for these roles solely in the context of Calibration by using the Manage Calibration Settings tool.

Calibration Session Statuses

Based on different phases of a calibration session life cycle, a calibration session can be in various statuses.

Status	Description
Setup	The session has been created and validated. But the session has not been activated yet.
In Progress	The session has been activated. But the session has not been finalized yet.
Approving	It is a short intermediate phase between *In Progress* and *Approved*. The *Finalize* button has been clicked. The session finalization has been triggered. But the finalization has not completed yet.
Approved	The finalization is completed.
Deactivated	The *Deactivate* button has been clicked. Only *In Progress* sessions can be deactivated.

Parent topic: Basic Concepts in Calibration [page 8]

1.2 Data Integration in Calibration

You can gather and integrate different data in Calibration.

By using Calibration, you can gather data from following tools and update the data automatically in its original source.

Tools	Metrics
SAP SuccessFactors Performance Management	• Overall objective/goal rating • Overall competency rating • Overall performance review score
SAP SuccessFactors Compensation	• Salary: Final compa ratio, Final range penetration, merit, promotion, extra, extra2, lumpsum, lumpsum2 • Stock: stock, options, stockUnits, stockOther1, stockOther2, stockOther3 • Bonus: total, target • Variable Pay
People Profile	• Potential • Performance • Competency • Objective • Custom01 • Custom02
SAP SuccessFactors Succession	• Risk of Loss • Impact of loss • Reason for Leaving

1.2.1 Fundamentals of Data Creation During a Calibration Session

You can have an overview of how Calibration works.

The source of calibration data comes from the Performance Management, People Profile, Compensation, and Succession components. Through discussions between managers who discuss selected groups of employees, calibration ratings are adjusted, and when the talent cycle is completed, the updated information is published back to the original sources.

Individually you maintain data in these sources:

You decide to launch a group discussion about how each (or some combination) of those ratings came about, and whether they should be changed now that you are looking across a group of employees
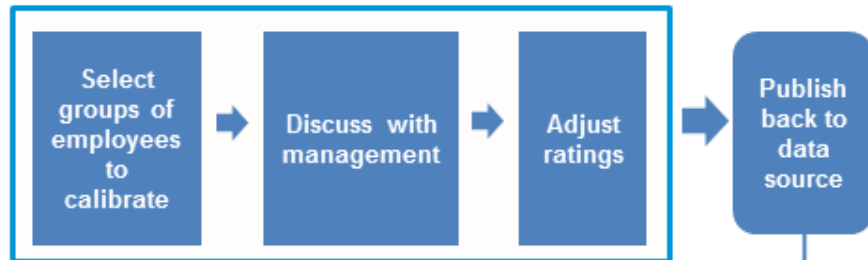
When this step is complete in the Talent cycle, the original sources are updated

Performance Management
successfactors
BUSINESS EXECUTION SOFTWARE

Employee Profile Data
successfactors
BUSINESS EXECUTION SOFTWARE

Compensation
successfactors
BUSINESS EXECUTION SOFTWARE

Succession
successfactors
BUSINESS EXECUTION SOFTWARE

Calibration Session

Select groups of employees to calibrate → Discuss with management → Adjust ratings

Publish back to data source

Fundamentals of the Data Created During a Calibration Session

1.3   Calibration on the Latest Home Page

Calibration is part of SAP SuccessFactors Performance & Goals. Learn about Calibration features on the latest home page.

Name	Description	Where Shown	When Shown	Prerequisites	On Mobile?
Complete Calibration	Prompts you to review and complete a calibration form, for yourself or for others. (To-Do Category 12)	*For You Today*	Appears when you have a calibration session to complete. Disappears in any of the following cases: • The calibration session is finalized or deleted. • 180 days after the due date, if no action is taken and a due date is set for the calibration session. • 180 days after the Last Modified date, if no action is taken and **no** due date is set for the calibration session.	None	No

2 Getting Started with Calibration

Enable and configure Calibration in your instance so that users can start using it.

There are three steps to start with:

1. Enabling Calibration settings in Provisioning.
2. Configuring data model in Provisioning.
3. Granting users permission to access Calibration.

> **→ Remember**
>
> As a customer, you don't have access to Provisioning. To complete tasks in Provisioning, contact your implementation partner or Account Executive. For any non-implementation tasks, contact Product Support.

1. Enabling Calibration in Provisioning [page 15]
   Enable Calibration in Provisioning using settings listed in the following table.
2. Configuring the Data Model [page 16]
   Rating elements, display options, and filter options are all based on the configuration of the data model.
3. Role-Based Permissions for Calibration [page 20]
   The Role-Based Permissions governs the actions that each user can perform within Calibration, based on the role assigned by the administrator.

2.1 Enabling Calibration in Provisioning

Enable Calibration in Provisioning using settings listed in the following table.

> **→ Remember**
>
> As a customer, you don't have access to Provisioning. To complete tasks in Provisioning, contact your implementation partner or Account Executive. For any non-implementation tasks, contact Product Support.

> **i Note**
>
> All the following settings except Enable Calibration can also be enabled in Global Settings.

Calibration Settings in Provisioning

Settings	Description
Enable Calibration (requires Role-Based Permission)	Enables the module in the instance.

Settings	Description
Limit Employee to be included in only one calibration session at a time	Employees can't participate in multiple sessions. Do not enable this feature if the business process of the customer requires overlapping sessions. For example, *Performance Review* and *Talent Review*.
Enable Calibration Executive Review	Enables the *Executive Review* feature. With permission, executive reviewers can see aggregate session data without being involved directly in each session.
Enable Manager Calibration Session	Enables the option for managers to create their own sessions without administrative privileges.
Enable Reverse Scale	If the customer is using a reverse scale (1 is the highest rating), this feature should be enabled to adjust the Calibration views accordingly.
Enable Enforce Comment Option In Views	Enables the option to enforce comments when a rating is changed. This option can be enabled or disabled for each calibration template.
Show In-Progress Calibration Ratings In Live Profile	If you enable this feature, Calibration ratings that have not yet been finalized appear in the People Profile.
Launch Calibration From PM v12 Team Overview	Enables the option so that managers can create sessions directly from the Team Overview tab for PM v12 forms.

Parent topic:

Next:

Related Information

2.2   Configuring the Data Model

Rating elements, display options, and filter options are all based on the configuration of the data model.

> → Remember
>
> As a customer, you don't have access to Provisioning. To complete tasks in Provisioning, contact your implementation partner or Account Executive. For any non-implementation tasks, contact Product Support.

2.2.1 Rating Elements

The rating elements are available based on the configuration of the data model. Not all rating elements are used for every customer. The configured labels appear in the Calibration template and session.

- sysOverallPerformance
- sysOverallPotential
- sysOverallCompetency
- sysOverallObjective
- sysOverallCustom01
- sysOverallCustom02

> i Note
>
> The rating element IDs are case sensitive.

> ⇛ Sample Code
>
> ```
> <background-element id="sysOverallCustom1" type-id="35" scale-id="Custom1" max-entries="50" feedback-type="27">
> ```

Other data can be displayed in the Bin or Matrix Grid view in addition to the rating elements mentioned:

- riskOfLoss
- impactOfLoss
- reasonForLeaving

> i Note
>
> If there is only one language enabled in customer's company instance, frequent Matrix Grid rating scale change may lead to rating ID inconsistencies. Thoroughly test reporting with the revised or new matrix rating scale before using it in production instance.

Parent topic: Configuring the Data Model [page 16]

Related Information

Display Options [page 18]
Filter Options [page 18]

2.2.2 Display Options

Display options can help users focus on just the relevant subject information.

There are several hard-coded fields that always appear in the display options:

- First Name
- Last Name
- Count

If you have enabled the quickcard option in a template, the following display option will also be available:

- QuickCard

Any display option fields that you have defined in the Matrix Grid Classifier tool are also displayed. The Matrix Grid Classifier is a tool that is typically used for SAP SuccessFactors Succession to define the icons for a given field. The icons are then displayed to visually represent certain data elements.

Parent topic: Configuring the Data Model [page 16]

Related Information

Rating Elements [page 17]
Filter Options [page 18]

2.2.3 Filter Options

Filter Options can help narrow the number of subjects to be displayed for a calibration session.

Filter Options has a mix of both hard-coded fields, and extra filters that customers can define.

The hard-coded Filter Option fields are as follows:

- Name

- First Name
- Middle Name
- Last Name
- Manager
- Title
- Country
- Level
- Username
- Division
- Department
- Location
- Status
- Email
- Job Code
- Gender
- Risk of Loss
- Impact of Loss
- Reason for Leaving
- New to Position
- Future Leader
- Key Position
- Matrix Managed
- Discussed

> ### i Note
>
> *Risk of Loss*, *Impact of Loss*, and *Reason for Leaving* are fields you can enable or disable on the Data tab when you configure a template. If these fields are defined in your data model, regardless of whether or not they are enabled at the template level, they still show up as an entry under *Filter Option*.

> ### i Note
>
> The *Discussed* option is predefined as a default filter that you can use without any configuration.

To add fields to the *Filter Option* list, you must navigate to the *Succession Data Model*. There is a special place for <custom-filters> where various modules define the filter-ability of fields in their module. The <custom-filters> is also where Calibration sets the filter-ability of certain fields.

By using the tag <filter-module id="calibration"> under <custom-filters> in *Succession Data Model*, you can define other custom fields to appear in the *Filter Option* list for your sessions.

```
<custom-filters>
 <filter-module id="calibration">
 <standard-element-ref refid="custom01"/>
 <standard-element-ref refid="custom02"/>
 <standard-element-ref refid="custom03"/>
 <filter-module>
<custom-filters>
```

> **i Note**
>
> Filter Option is a global setting and cannot be configured for each Calibration template.

Parent topic: Configuring the Data Model [page 16]

Related Information

Rating Elements [page 17]
Display Options [page 18]

2.3 Role-Based Permissions for Calibration

The Role-Based Permissions governs the actions that each user can perform within Calibration, based on the role assigned by the administrator.

The following terms form the foundation of permissions used with components that form the SAP SuccessFactors Calibration solution:

Term	Associated permissions
Admin rights	Determines which users can administer components of the solution
End user rights	Determines whether a user can access the solution
Reporting rights	Defines which data a user can view in Reports and Dashboards
Calibration roles	Defines what each assigned user is allowed to do when they access a calibration session
Executive summary rights	Determines whether a user is allowed to access the Calibration Executive Review roll-up data
Target population	• Defines which population of employee accounts that a user is allowed to see when accessing sessions or an Executive Review summary • Defines which population of employee accounts on which a use is allowed to perform administrative tasks

Parent topic: Getting Started with Calibration [page 15]

Previous: Configuring the Data Model [page 16]

3   Setting Up Calibration Templates

Use the Calibration templates to define the type of data that is reviewed during calibration sessions and how that data is displayed.

The Calibration template defines two main things for users: What data to calibrate, and how they want managers to visualize the data to make necessary adjustments. It doesn't become live and used until you launch a calibration session that uses the template.

When you go to ▐ *Admin Center* 〉 *Calibration* 〉 *Manage Calibration Templates* ▌ to configure a template, you set the following values for the template.

Value	Description
Basic Info	Defines the template name and review period
Data	Defines what data customers want to calibrate
Views	Defines how users interact with the data.
Advanced	Provides various options that give even more flexibility for configuring the session view for users.
Executive Review	Designates the standard graphs and sensitive data to be viewed.

> i Note
>
> When you use a cloned template for creating a session, we recommend that you maintain a gap of 24 hours from the time the template was cloned. If you create a session within 24 hours of cloning the template, the auto-population of subjects and participants might not work as expected.

Creating a Calibration Template [page 21]
   Create a calibration template with which users can start creating sessions.

3.1   Creating a Calibration Template

Create a calibration template with which users can start creating sessions.

Procedure

1. Go to ▐ *Admin Center* 〉 *Calibration* 〉 *Manage Calibration Templates* ▌.
2. Select *Create New*.
3. Enter the Template Name and the Review Period fields.

   They are required fields.

4. Navigate to the *Data* tab, and select the data source for the elements.

5. Navigate to the *Views* tab, and select views.

   Configure at least one Bin or Matrix Grid view.

6. Navigate to the *Advanced* tab, and select the appropriate features for this template.

7. Navigate to the *Executive Review* tab, and select the appropriate features for this template.

8. Select *Save*.

> **i Note**
>
> Be sure to enable the template for use when you have finished making your changes before saving and exiting the page. To remove access to an existing template, select the disable icon to the right of the listed template.

Results

You've successfully created a calibration template.

Task overview:

3.2 Components of Calibration Templates

3.2.1 Basic Info

The two fields *Template Name* and *Review Period* under the *Basic Info* tab are required.

Template Name: Provides a name for the template. It's recommended that you consider a descriptive name that will make it easy to identify the type of session from reports or admin tools in the future.

Review Period: The dates are similar to the Report Date Filters, and they apply to the most recent data point included in that time frame.

3.2.2 Data

3.2.2.1   Performance

Performance calibration allows you to calibrate performance, goal, potential, or other customer-defined rating elements that are stored in a form template.

Template and Route Map

Select the form template you want to calibrate from the picklist. The Route Map name populates automatically. Choose from the list of available route map steps. Single user and collaborative steps can be designated for Calibration. Only modify steps appear, and signature steps aren't valid for Calibration.

> ⚠ Caution
>
> Don't calibrate multiple Performance form templates, with different route maps or rating scales, within a Calibration template. Use of multiple Performance form templates within a Calibration template can cause issues while finalizing the calibration sessions.

> → Tip
>
> If you need to calibrate the ratings from the Customized Weighted Rating section, set the step for Calibration after the step at which the calculation of overall customized weighted rating is triggered in the Performance Management form.

Elements for Calibration

Performance form ratings allow for both calculated ratings and manual override ratings. If manual ratings are set in the Performance form template, rating elements populate automatically from the selected form template. If the Performance form template contains calculated ratings, you must map the ratings to values from the rating scale.

> i Note
>
> When a rating scale is modified, the rating label is updated accordingly. This change applies to all data. To avoid the impact on the existing data, you can create a new rating scale.

Distribution Guidelines

Guidelines can be applied to a session to encourage users to align to a recommended distribution. Guidelines are optional, but if you choose to use guidelines, you must set a distribution or a distribution range applied to an individual rating or a group of ratings. A guideline can include an individual rating or a group of ratings. In a guideline, you can use more operators besides =, such as <, <=, >, >=, and *is between*.

The total distribution must be exactly 100% in the following case where each guideline includes an individual rating with the operator =:

There's no limitation that the total distribution must be 100% if any of the following conditions is met:

- More than one rating is included in a guideline.
- An operator other than = is configured in a guideline.
- A rating appears more than once in multiple guidelines.
- Not all ratings are configured in all guidelines.

> i Note
>
> If you have multiple guidelines that include the same individual rating, only the first mismatched guideline shows in the notification of a bin in the Bin view.

> ! Restriction
>
> The distribution range, groups of ratings, and different operators other than = aren't supported in People Profile and Talent Flag.

> ⁂ Example
>
> In the following figure, there are three guidelines in total. Guidelines no. 1 and no. 3 each include an individual rating. In guideline no. 2, rating *2 Needs Development*, rating *3 Meets Expectations*, and rating *4 Exceeds Expectations* compose a group of ratings whose total distribution is equal to 80%.
>
>

If you choose to use guidelines, you can see them in the Dashboard view, Bin view, and Executive Review view.

Related Information

3.2.2.1.1 Subject Distribution According to Distribution Guidelines

The system calculates the target number of subjects for each performance rating according to the defined distribution guidelines. How decimal numbers are added up and allocated is slightly different in various guideline scenarios.

Allocating the Total of Decimal Parts from Largest to Smallest Distribution Proportion

When the calculated distribution results have decimal numbers, the system adds up the decimal parts and distributes the whole numbers to each performance rating. The distribution starts from the rating with the largest distribution proportion to that of the smallest proportion.

In the following example, a calibration session contains 4 subjects, and the target distribution is calculated as follows:

Rating	Low	Medium	High
Distribution Guideline	30%	45%	25%
Ideal Distribution	1.2	1.8	1
Largest Whole Number for Distribution	1	1	1
Decimal Part	0.2	0.8	0
Target Distribution	**1**	**2**	**1**

The total of the decimal parts is 1 (0.2+0.8) and it is allocated to Medium (45%), which is the largest distribution proportion among the three ratings.

Allocating the Total of Decimal Parts from Lowest Rating to Highest Rating

In the situation where the distribution parts are the same, the total of the decimal parts is distributed from the lowest rating to the highest (left to right in the bin view).

In the following example, a calibration session contains 7 subjects, and the target distribution is calculated as follows:

Rating	1- Unsatisfactory	2 - Needs Development	3 - Meet Standard	4 - Outstanding	5 - Extraordinary
Distribution Guideline	20%	20%	20%	20%	20%
Ideal Distribution	1.4	1.4	1.4	1.4	1.4
Largest Whole Number for Distribution	1	1	1	1	1
Decimal Part	0.4	0.4	0.4	0.4	0.4
Target Distribution	**2**	**2**	**1**	**1**	**1**

The total of the decimal parts is 2 (0.4+0.4+0.4+0.4+0.4) and it is allocated to 1 - Unsatisfactory and 2 - Needs Development.

Allocating the Total of Decimal Parts in Guidelines with Rating Groups

When the guidelines contain rating groups, the system distributes the total of the decimal parts to those individual ratings, either from the rating with the largest distribution proportion to the one with smallest proportion or from the lowest rating to the highest (left to right in the bin view).

In the following example, a calibration session contains 22 subjects, and the expected distribution is calculated as follows:

Rating	1 - Unsatisfactory	2 - Needs Development	Total of 3 - Meet Standard, 4 - Outstanding, and 5 - Extraordinary
Distribution Guideline	20%	30%	50%
Ideal Distribution	4.4	6.6	11
Largest Whole Number for Distribution	4	6	11
Decimal Part	0.4	0.6	0
Target Distribution	**4**	**7**	**11**

The total of the decimal parts is 1 (0.4+0.6) and the number is allocated to 2 - Needs Development (30%), which has the larger distribution proportion.

Rounding off Decimal Parts in Guidelines with "is in between"

When a guideline contains the operator "is in between", the system rounds down to the lower limit and rounds up to the upper limit to determine the expected number range. And for those individual rating guidelines that don't contain "is in between", the system just rounds down to the largest whole number.

In the following example, a calibration session contains 13 subjects, and the target distribution is calculated as follows:

Rating	1 - Unsatisfactory	2 - Needs Development	3 - Meet Standard	4 - Outstanding	5 - Extraordinary
Distribution Guideline	10%	10%	50% - 60%	10% - 20%	10%
Ideal Distribution	1.3	1.3	6.5 - 7.8	1.3 - 2.6	1.3
Target Distribution	**1 (round down)**	**1 (round down)**	**6 (round down) - 8 (round up)**	**1 (round down) - 3 (round up)**	**1 (round down)**

The total of the decimal parts is 1 (0.4+0.6) and it is allocated to 2 - Needs Development (30%), which has the larger distribution proportion.

3.2.2.2   Compensation

Compensation calibration allows you to calibrate the compensation ratios of employees.

Template

Select the form template you wish to calibrate from the picklist. The Route Map populates automatically.

> **i Note**
>
> Calibration does not support Compensation forms with only iterative steps.

Route Map Step

Choose from the list of available route map steps. Only modify steps appear.

Ratio and Range Groups

Based on which template is selected, the available planning components and range groups are available for selection. Any standard field for planning can be chosen as either the final range penetration or final compa ratio benchmark.

Available planning fields are as follows:

- Salary: merit, promotion, extra, extra1, lumpsum, lumpsum2
- Stock: stock, options, stockUnits, stockOther1, stockOther2, stockOther3
- Bonus: total, target (the Bonus tab in a CMP form not a VRP form)

After the planning or benchmark element is defined, an admin sets up the number of range groupings from 2 to 5, and set the percentage or amounts that will place employees within those groups. For example, for "merit" you may group by below 2%, 2% to 4% and above 4%. For range penetration, you may group by below 0%, 0% to 33%, 33% to 66%, 66% to 100%, and above 100%.

> **i Note**
>
> It is not configurable to set up the grouping in relation to the provided guideline, such as "within Guideline", "below guideline" or "above guideline". If guidelines differ by region, you may wish to create a different template for each region.

3.2.2.3   People Profile

People Profile calibration allows you to calibrate custom ratings, if any, during the session. Changes to ratings will be applied to the profile upon each save within the session, but won't be visible until session finalization unless the profile is configured to display in-progress ratings.

Rating Types

The rating elements below are available per the configuration of the data model. Not all rating elements are used for every customer, and the configured labels appear in the Calibration template. Decimal ratings can be supported, but must be mapped to whole numbers. You can apply guidelines to the profile ratings as well.

> **i Note**
>
> When a rating scale is modified, the rating label is updated accordingly. This change applies to all data. To avoid the impact on the existing data, you can create a new rating scale.

- SysOverallPerformance
- SysOverallPotential
- SysOverallCompetency
- SysOverallObjective
- SysOverallCustom01

- SysOverallCustom02

Rating Rules

When you're configuring rating data type of People Profile, make sure that:

- The start date and the end date are within the calibration template date range.
- The imported ratings are within the min and max values of the rating scale.
- If you want to pull in ratings from in-progress Performance reviews, enable the *Show in-progress form ratings in live profile* option in Provisioning.

  > → Remember
  >
  > As a customer, you don't have access to Provisioning. To complete tasks in Provisioning, contact your implementation partner or Account Executive. For any non-implementation tasks, contact Product Support.

- If there are decimal ratings, enable the *Support decimal rating* option.

3.2.2.4   Talent Flag

Talent Flag allows users to access and modify the talent flags of subjects during a calibration session.

If users have defined standard elements in Succession, you can add these elements to a Calibration template:

- Risk of Loss
- Impact of Loss
- Reason for Leaving

Optionally, you can also set distributional guidelines for Talent Flag. Typically these talent flags are included to plot on a 9-box.

3.2.2.5   Others

Data from certain modules can be displayed in calibration sessions. The data is for reference only and cannot be calibrated.

Other Data That Can Be Displayed in Calibration Sessions

Data	Description
Allow access to Development	Gives facilitators access to the Development Plan of the subjects.
Allow access to Learning Activity	Gives facilitators access to the Learning Activity of the subjects.

Data	Description
Show Succession status icons from the Succession Matrix Report	Displays the Succession status icons for each subject. Status is pulled from Succession Matrix Report.
Display QuickCards	Adds access to the quick card of each subject. Quick cards provide team and performance information about employees.
Allow access to Continuous Performance Management Achievements	Adds access to Continuous Performance Management Achievements.

> → Recommendation
>
> It's recommended always to display quick cards as they're helpful when you aren't familiar with all subjects or have subjects with the same name in a session. They also take you quickly to other areas of the system when you need more information for calibration discussion.

3.2.2.5.1 Integrating Achievements with Calibration

Display the achievements that customers add via the Continuous Performance Management solution to a calibration template.

Prerequisites

- Calibration and Continuous Performance Management, correctly configured
- Either the Enterprise or the SPRAC product edition, correctly configured

Context

This integration enables managers to view the achievements of their direct reports in the calibration sessions using the template.

> i Note
>
> Only the employee and the manager of the employee can view employee achievements in Continuous Performance Management.

Procedure

1. Go to ▶ *Admin Center* 〉 *Manage Calibration Templates* 〉.

2. Choose the Calibration template in which you want to include the Continuous Performance Management achievements.

3. Go to ▶ *Data* ❯ *Others* ❯ *Allow access to Continuous Performance Management Achievements* ❯ *.* ◼

4. Choose *Save*.

Results

The Continuous Performance Management achievements data is available as a dropdown option for the subjects in the Calibration session.

3.2.3 Calibration Views

Calibration provides different user interface views for users to visualize and interact with sessions: Dashboard, List View, Bin View, Matrix Grid View, and Executive Review.

Each view offers different functions. When reviewing a specific session, users can choose and edit subjects in different views. Users' selections of subjects apply to all views. To clear the selections, users can click the *Deselect All* in the *Actions* dropdown menu.

To move business beyond bias, the calibration sessions can be made photoless and can have gender indicators to help the calibrators avoid any unintentional bias towards the calibration subjects. You can select ▶ *Enable Gender Indicators* ◼ under ▶ *Admin Center* ❯ *Manage Calibration Templates* ❯ *Advanced* ◼ to show Male and Female gender values. After the setting is complete, users can see gender indicators in different views of a calibration session.

> i Note
>
> Three additional gender values, Unknown, Undeclared, and Others, are supported now. As a prerequisite, select ▶ *Upgrade Now* ◼ under ▶ *Upgrade Center* ❯ *Optional Upgrades* ❯ *Enhancement to Gender Values – Inclusion of Additional Gender Values* ❯ *Learn More & Upgrade Now* ◼. The indicators for five gender values have been redesigned. For more details, see Field Requirements for the User Data File.

Dashboard View

The Dashboard view provides users with an aggregated view of data in a particular session. The Calibration dashboard is automatically created to summarize the current state of the calibration process.
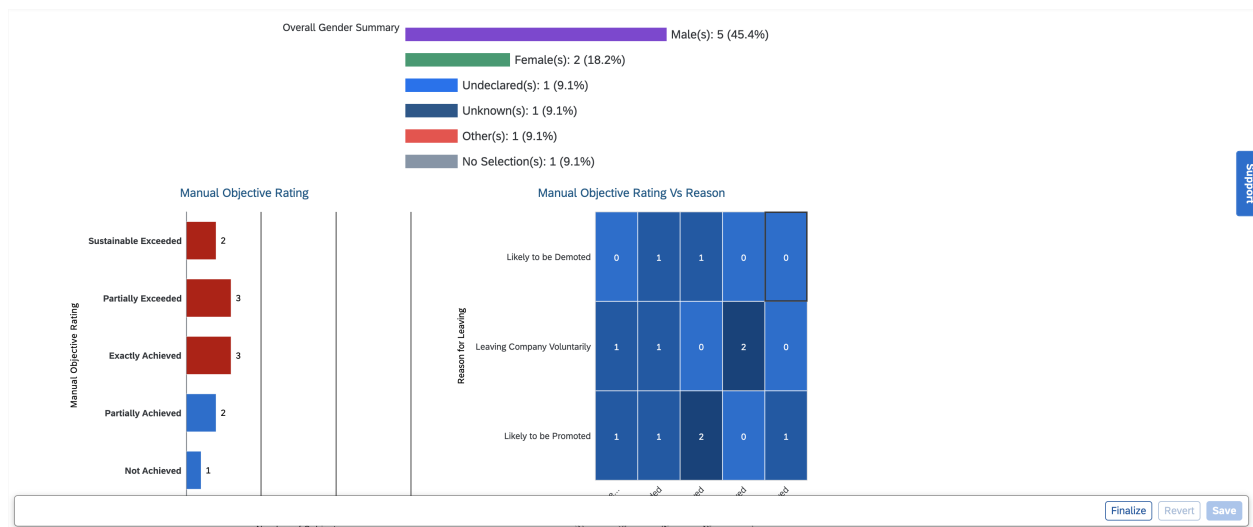
If any of the following conditions is met, the bar charts in the Dashboard view show the actual distribution for each rating from the rating scale:

- More than one rating is included in a guideline.
- An operator other than = is configured in a guideline.
- A rating appears more than once in multiple guidelines.
- Not all ratings are configured in all guidelines.

The blue bar indicates that the actual distribution matches the guideline while the orange bar indicates that the actual distribution doesn't match the guideline. When you hover the mouse over a bar, you can compare between the target distribution and the actual distribution. If a group of ratings is configured in a guideline, both the target distribution and the actual distribution refer to the distribution for the group of ratings.

List View

The List view enables users to:

- See a quick tabular view of subjects in a calibration session.
- Quickly select checkboxes to mark off items as already discussed or to access forms, development plans, or personal information.

Overall Gender Summary
Male(s): 5 (45.4%)
Female(s): 2 (18.2%)
Undeclared(s): 1 (9.1%)
Unknown(s): 1 (9.1%)
Other(s): 1 (9.1%)
No Selection(s): 1 (9.1%)

Subject	Display Name	Gender	Human Reso...	Impact of Loss	Manager	Risk of Loss	Username	Discussed?	Manual Obje...	Reason for L...	Manual Obje...
Alexander Tho...	Alexander Th...	Male	Alice Fong	Medium	Daniel Cortez	N/A	athompson		Sustainable E...	Likely to be P...	
Dora Zamora	Dora Zamora	Undeclared	Nancy Nash	N/A	Daniel Cortez	7577	CKUDI		Partially Exce...	Likely to be D...	
Eliza Hunter	Eliza Hunter	Female	Nancy Nash	N/A	Daniel Cortez	N/A	LZ		Partially Achie...	Leaving Com...	
Jonathan Lamb...	Jonathan La...	Unknown	Nancy Nash	N/A	Daniel Cortez	N/A	UWXQJBLUL...		Not Achieved	Likely to be P...	
Kent Campbell	Kent Campbell	Male	Paula Lucas	Medium	Sun Sun	Low	kcampbell		Exactly Achie...	Likely to be P...	
Lars Hillers	Lars Hillers	Male	Paula Lucas	High	Sun Sun	High	lhillers		Exactly Achie...	Likely to be P...	
Marcia Barista	Marcia Barista	Others	No Manager	High	Daniel Cortez	N/A	mbarista		Partially Exce...	Leaving Com...	
Nancy Market	Nancy Market	N/A	Linda Lewis	Low	Daniel Cortez	Low	nmarket		Sustainable E...	Leaving Com...	
Paul Price	Paul Price	Male	Marcia Barista	High	Sun Sun	Medium	pppp		Partially Exce...	Likely to be P...	
Randy Winger	Randy Winger	Male	Lorna Okamoto	High	Daniel Cortez	High	rwinger		Partially Achie...	Leaving Com...	
phase6 migrate6	phase6 migrat...	Female	No Manager	N/A	Daniel Cortez	N/A	N/A		Exactly Achie...	Likely to be D...	

Finalize Revert Save

Key: Male(s) Female(s) Undeclared(s) Unknown(s) No Selection(s) Other(s)

Bin View

The Bin view enables users to:

- Calibrate any ratings from SAP SuccessFactors.
- Drag and drop in the user interface.
- Edit a source form (for example, the Performance Management form).

> **i Note**
>
> Users can readjust the width of a bin by using the splitter bar.

Overall Gender Summary
Male(s): 5 (45.4%)
Female(s): 2 (18.2%)
Undeclared(s): 1 (9.1%)
Unknown(s): 1 (9.1%)
Other(s): 1 (9.1%)
No Selection(s): 1 (9.1%)

Sustainable Exceeded
2 (18.2%) -2

Name
Alexander Thompson
Nancy Market

Partially Exceeded
3 (27.3%) -2

Name
Dora Zamora
Marcia Barista
Paul Price

Exactly Achieved
3 (27.3%) +4

Name
Kent Campbell
Lars Hillers
phase6 migrate6

Partially Achieved
2 (18.2%)

Name
Eliza Hunter
Randy Winger

Not Achieved
1 (9.1%)

Name
Jonathan Lambert

Finalize Revert Save

If a guideline includes an individual rating, the numbers in a bin direct you to add or remove subjects per the guidelines in order to comply with the guidelines. If a guideline includes a group of ratings, a warning message shows above the bins how to adjust the total number of subjects for those ratings to meet the guidelines.

Matrix Grid View

The Matrix Grid view enables users to:

- Easily view any two data elements from supported sources.
- Use drag and drop support in the user interface.
- Edit a source form (for example, the Performance Management form).
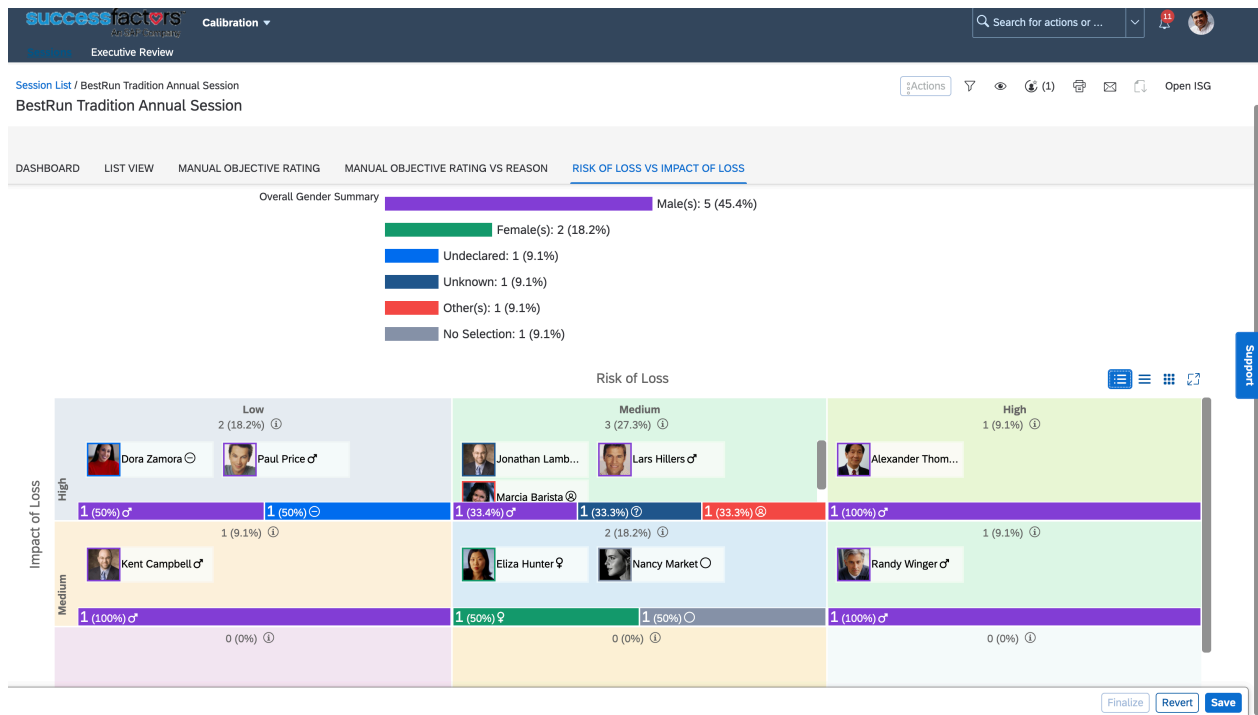
The Matrix view has multiple views within it that display the names and photos, only names, and only photos of the calibration subjects. The screenshot shows the inline notes used in the Matrix view. All the views within the Matrix view show the gender ratios for each cell.

> **i Note**
>
> As an effort to move business beyond bias, users can add inline notes to each cell in the Matrix view. Inline notes help the decision makers in a calibration session to have the same understanding of each cell, while calibrating the subjects. Inline notes help in avoiding any unintentional bias, due to difference in perception of the cells in Matrix view. Users can add inline notes while configuring the Matrix view in a calibration template, and the notes appear in the calibration sessions based on that template. Inline notes are available only if the SAP Fiori option for Calibration has been enabled.

Executive Review View

The Executive Review View enables HR and business executives:

- Easily view aggregated graphs and session details for a given calibration template used in a talent management cycle.

- Drill down to a *Subjects List* page and have a close look at details of employees with the same data, such as ratings.

The bar charts in the Executive Review view work the same way as those in the Dashboard view.
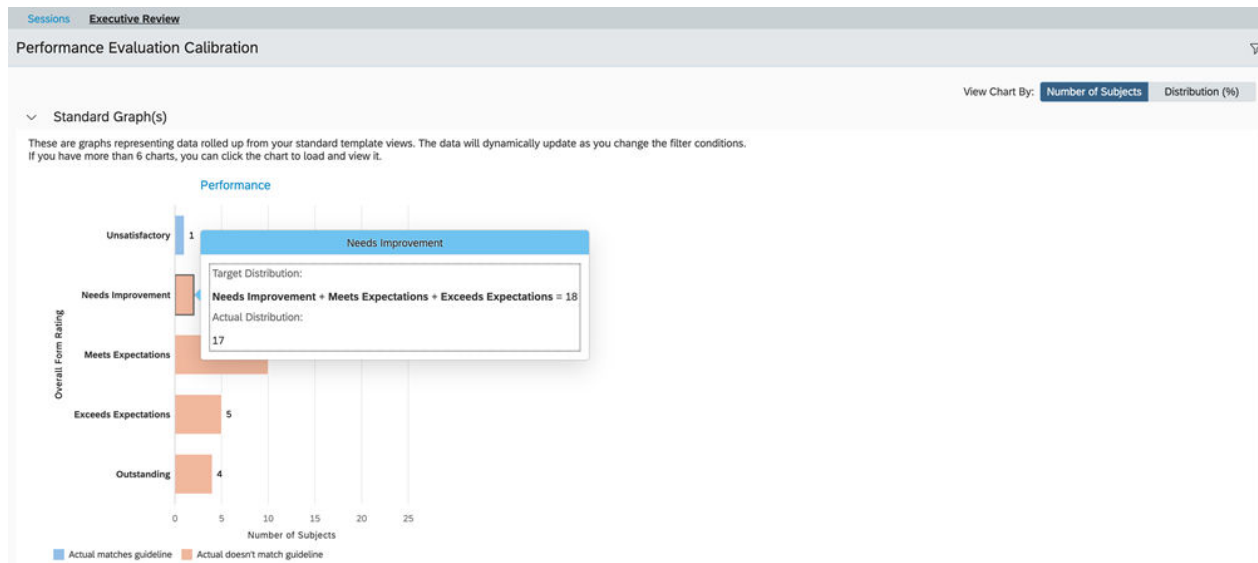
3.2.3.1 Configuring Calibration Views

Configure calibration views to display any of the data sources either individually or against each other.

Procedure

1. Select ▌▶ *Admin Center* ❯ *Calibration* ❯ *Manage Calibration Templates* ▶ .
2. Select or create a template and navigate to the *Views* tab.
3. Choose a calibration element for the X axis. If you choose one element, you create a bin view. If you choose another element for the Y axis, you create a grid view.

   > **i** Note
   >
   > If you are planning to export calibration sessions with matrix grid views, configure the background with dark colors. Although font color of labels on the calibration session UI is customizable, the default font color of labels in **exported files** is white. If you configure the background with light colors, the labels might not be visible in exported files and you may have to change the font color of the labels manually in the files.

4. Select from the available options.
5. To display or hide the calculated ratings in the *Bin* view, select or clear *Show Calculated Rating* in addition to *Manual Rating* (only applicable to Bin view). If no calculated performance rating is configured in the Performance Management template, the *Show Calculated Rating* checkbox is dimmed and unavailable.
6. To enable or disable drag and drop for the view, select or clear *Enable Drag and Drop*. This option is available for manual Performance Management form ratings and People Profile ratings. You cannot drag and drop a calculated Performance Management form rating. If there are only calculated ratings selected, the drag and drop option is disabled. Compensation elements are changed by selecting the link to access the mini view of the compensation form.

7. To require a comment when a rating is adjusted, select *Enforce comments on rating change*. Users in the session are not allowed to change a rating without leaving an explanation in the comments field.

8. (Bin Views only) If you have selected other rating elements, you can choose to display them along with the main element for this view. Select one of the options in *Show an Extra Column* for bin view to display.

> **i Note**
>
> To avoid dirty data and duplicate ratings, do not select the same rating element in the *Show an Extra Column* field as that has been used in the bin view.

9. Enter a view name, and repeat if needed for other languages.

10. (Matrix Views only) Define labels and select background colors for your matrix views.

11. Select *Save*.

Results

You have successfully configured views in the Calibration template.

3.2.3.1.1   Managing What Users See in the List View

Set up the fields that are displayed in the List view.

Procedure

1. Select ▌▶ *Admin Center* ❯ *Calibration* ❯ *Manage Calibration Templates* ▌.

2. Select or create a template and navigate to the *Views* tab.

3. Select the *List View* tab.

4. Choose *Enable List View* if you want to display this view.

   - If you want to see the listing of all ratings included in the session, choose *Show Rating of Data Element*. If a user has permission, they can edit the ratings from the List view.

   - If you create a grid view and you want to see the grid cell label, choose *Show Grid Cell Label*.

   - If you want to view calculated ratings of employees for Performance rating elements, choose *Show Calculated Rating from Performance Management in List View*. When you've enabled manual rating for Performance elements, you can see calculated ratings displayed in the same column as manual ratings. When you've enabled calculated rating, you can see calculated ratings directly displayed in the same column as rating labels which have been defined in rating scales.

5. A table of all standard user fields configured in the data model is displayed. Click to select one or more user fields that you wish to display. When users open their List view in a calibration session, they can see the fields that you have chosen to display.

> **i Note**
>
> Some data fields, including userId, lastName, firstName, mi, matrixManager, customManager, secondManager, and photo, are not displayed in the table even though they're configured in the data model.
>
> The default sensitive personal data (SPD) fields, including ssn, minority, and ethnicity, are not displayed if the *Read Access Logging* is enabled.
>
> As of 2H 2020 release, you can configure certain fields as sensitive for read access logging. After the fields are configured as SPD fields, they are not displayed either. For details, see Important Notes About Read Audit.

6. Click *Save*.

Results

You have successfully configured fields for the List view.

3.2.3.1.2 Selecting Icons for Matrix Grid Reports

Add icons to represent field values for quick reference in the matrix grid reports.

Context

To provide users a quick, visual reference for employee attributes in the matrix grid reports, you can add icons to represent certain field values. For example, you want to indicate each employee's risk of loss as low, medium, or high by assigning a specific icon to represent each of those values for that field.

Procedure

1. Go to *Admin Center* and search for *Matrix Grid Report Icon Configuration*.
2. Click *Add A New Field*.

   If you don't have this option, it may be due to your system configuration. In which case, please contact Product Support.
3. Select a field and click *OK*.
4. For the field you want to edit, choose ▌▶ *Take Action* ❯ *Edit* ▌.
5. For each value of the field, click *Change* and select a corresponding icon before saving your changes.

   The Fiori style icons begin on page 10 of the list of icons.

> **i Note**
>
> The icons are provided by SAP and cannot be customized.

Results

Icons corresponding to employee attributes display with employee names in the matrix grid reports. If you select the *Display Only Photos* option from the report output, the icons are not displayed.

3.2.4 Advanced

3.2.4.1 General

The General section provides settings available for a calibration template. These selections apply to all sessions created with the same template.

General Settings

Option	Description
Automatically route forms on session finalization	When a session is complete and finalized, choose this option to route forms automatically to the next step in the workflow. This option is recommended for all final Performance form calibration sessions.
Enable force route button in validation step	When an admin is setting up a calibration session from Admin Center, if needed, this option enables them to move Performance forms into the correct route map step.
Enable rank column in bin view	If a bin view is configured, this option allows users to rank subjects within each bin. It can be helpful if users want to make rating changes to align to the distribution guidelines.
Enable Stack Ranker within Calibration	This option displays as the Analyze button when you select one or more subjects from the session. It appears in a pop-up window with the same interface as the Stack Ranker tool, and allows the user to compare up to 10 subjects.
Enable comment	This option enables users to store comments on each subject. The comments made in a calibration session are not transferred to the Performance or Compensation forms. They're only visible within the session, reports, or profile views associated with Calibration.

Option	Description
Quick card display on hover in list view	When a user hovers over the name of a subject in a session, the quickcard appears and provides them with the appropriate navigation options. Clicking directly on the name of a subject sends the user to the Employee Profile.
Include inactive users	If it's a requirement to include inactive users in the session, you can enable this option. By default, this option is disabled and inactive users are removed or not included in sessions.
Manager notification with rating changes on session finalization	This option enables an email notification to the manager of a subject if there's a rating change as a result of a finalized calibration session. The email lists the session name, subject names, old and new ratings.
Enable Guidelines Enforcement	If it's a requirement to adhere to the rating guidelines, you can enable this feature. Sessions cannot be finalized unless the guidelines are met.
Enable Multi-Select Drag and Drop	This option allows a user to select more than one subject at a time to adjust ratings.
Enable Photoless Calibration	This option allows you to hide photos in List view, Bin view, and Matrix view.
Enable Gender Indicators	This option enables you to display the gender ratios in List view, Bin view, and Matrix view. The Matrix view also displays gender segregation in each of the cells.
Roll up comments from the other sessions based on the same template	Shows all the comments that are made for an employee in the other sessions based on the same template. The comments will be consolidated into one tab in the comment dialog.
This option enables you to choose the rules that should be considered to generate alerts during a calibration session.	These rules will be applied to all the subjects of a session and the rule generation may result in Alert generation for some of these subjects. The Alert will get generated if a rule is successfully applied.
The auto route form during finalization and force routing will be a background process when the session goes beyond this specified number of subjects	For larger sessions, this threshold allows the administrator to continue working in the system while form routing occurs in the back end. The default number is 50.
The maximum number of viewable subjects without filtering	For larger sessions, this threshold hides users to improve system performance. Filters must be used to view subjects above the max. The default number is 200.

Option	Description
Enable Maximum Rating Change Span	This option enables you to set a maximum rating change span in calibration templates under the *Advanced* tab in Admin Center. The span is only available for manual ratings configured in Performance Management. After you set a span, if you make rating changes in the List view, Bin view, Matrix view, and the *Analyze* interface (by selecting the *Analyze* button), you can expect either of the following behaviors: • If the rating change you made doesn't exceed the maximum rating change span you've set in *Maximum Rating Change Span*, the rating will be changed. • If the rating change you made exceeds the maximum rating change span you've set in *Maximum Rating Change Span*, an error message pops up, and subsequently the rating will revert to its original one, the one at which the calibration session is activated.

> ⚠ Caution
>
> If the session includes PM v12 Acceleration forms using Out of Turn Access in the route map, you should not use the force route button in validation step option. If you auto route the forms into the session, there's a potential for data loss on the review form.

3.2.4.2 Restrict Calibration Role Access by Target Population

The *Restrict Calibration Role Access by Target Population* option can be used to make certain roles have limited access.

Typical calibration sessions allow all facilitators, owners, and participants to view information for all subjects in the session. If that does not meet the culture of your company or your requirements for calibration, you can restrict permissions by role. When a session is launched, individuals only see information for the users in their target population. Roles that can be restricted are:

- Facilitator
- Co-facilitator
- Owner
- Participant
- Executive Reviewer

To ensure that the roles can access the user ratings only for their target population, select roles from the *Restrict Calibration Role Access by Target Population* section in the *Advanced* tab of the Calibration template, and click *Save*. For example, if you want to restrict the *Facilitator* role to view the user ratings only for its own target population, select the *Facilitator* check box, and click *Save*.

3.2.4.3 Comment on Changes of Ratings

If you have chosen to enable comments and enforce them upon a change in ratings, there are additional options you can configure.

The additional data fields are:

- Authorized By
- Reason Code
- Comment

3.2.4.4 Calibration History Block

The *Calibration History Block* can be configured to display on the People Profile.

The *Calibration History Block* includes a summary of calibration session data in addition to rating information. Based on what you have configured on the *Data* and the *Views* tab in each calibration template, you can select no more than five rating types and three matrix view results to be displayed in the *Calibration History Block*.

3.2.4.4.1 Adding Calibration History Block to People Profile

Add *Calibration History Block* to *People Profile*.

Context

To add the *Calibration History Block*, you need to configure the data model first and manage the settings accordingly. With the permission ▶ *Employee Data* ❭ *Calibration History Block* ❭, users can see and edit the block.

Procedure

1. Configure data model using the following code.

```
<background-element id="calibrationHistoryPortlet" type-id="138">
    <label>Calibration History Block</label>
</background-element>
```

> → Remember
>
> As a customer, you don't have access to Provisioning. To complete tasks in Provisioning, contact your implementation partner or Account Executive. For any non-implementation tasks, contact Product Support.

2. To add the block to *People Profile*, go to ▌▶ *Admin Center* ❯ *Configure People Profile* ❱.

> **i Note**
>
> Two user fields *Facilitators* and *Discussed* can be added or removed on the block.

3. To configure the content of *Calibration History Block*, go to ▌▶ *Admin Center* ❯ *Manage Calibration Templates* ❱.
4. Select a Calibration template and enable *Used in Talent Profile*.
5. Click the chosen template and configure the available options in the *Advanced*.

> **i Note**
>
> If no rating types or matrix grid views are set up for the template, then no options are available for *Calibration History Block* section in the *Advanced*.

Results

You've added *Calibration History Block* to *People Profile*.

3.2.5 Executive Review

The Executive Review is a feature that only users with special permissions can use to access aggregated graphs and session details for this template.

There are multiple types of graphs and information you can show. If the data access of the *Executive Reviewer* role has been restricted to its target population using the *Restrict Calibration Role Access by Target Population* section in the *Advanced* tab of the Calibration template, then the graphs and filters on the *Executive Review* tab respects the restriction.

Standard Graphs from Calibration Template [page 43]
> Any of the graphs or charts you configured as a part of this Calibration template are available to aggregate on the *Executive Review* page.

Sensitive Data [page 45]
> Extra graphs that are considered sensitive can be added, to which not everyone in the organization has access.

3.2.5.1   Standard Graphs from Calibration Template

Any of the graphs or charts you configured as a part of this Calibration template are available to aggregate on the *Executive Review* page.

The graphs are configured through the ▌▶ *Manage Calibration Templates* ❯ *Views* ❱ tab. For example, when 9-boxes and rating distribution graphs are included, admins can check the boxes to enable the graphs on the *Executive Review* tab for this template.

Parent topic:

Related Information

3.2.5.1.1   Subjects List

The *Subjects List* page offers detail information of subjects aggregated on the *Executive Review* page.

Overview

On the *Executive Review* page, session reviewers can click the cells, bars, or titles of standard graphs to drill down to a *Subjects List* page, on which the reviewers can see the details of employees with the same data, such as ratings, in a list. The clickable session name can navigate to a specific session, in which the reviewers can read more information, or edit ratings.

Actions Allowed

The subjects list can be printed and exported. When the reviewers use the export function, the list is exported to an Excel document. When the reviewers use the print function, the list is exported to a PDF document. For a list of more than 150 subjects, it's advisable to export it to an Excel document so as to achieve a better performance.

The page display can be changed. Having different focuses on information, session reviewers can customize the page display to highlight the key information as desired. The page display can be changed by adding, removing, and reordering the columns. The changes are saved automatically and kept even after the page is refreshed.

Fields Supported

The *Subjects List* page in the *Executive Review* doesn't show all standard fields for the subjects. For now, three fields, namely *Risk of Loss*, *Reason for Leaving*, and *Impact of Loss*, don't display on the *Subjects List* page if you only enable them as user fields in the List View. The solution is to enable the fields through ▷ *Admin Center* ▷ *Manage Calibration Templates* ▷ *Data* ▷ *Talent Flag* ◁ and set them as rating elements for one view, which is enabled through the *Executive Review* page.

The following fields are supported for the *Subjects List*:

- FIRSTNAME
- LASTNAME
- USERNAME
- GENDER
- EMAIL
- MANAGERID
- HRID
- COUNTRY
- DIVISION
- DEPARTMENT
- LOCATION
- EMPID
- ZIPCODE
- CITY
- TITLE
- TIMEZONE
- MINORITY
- JOBCODE
- HIREDATE
- ADDRESSLINE1
- ADDRESSLINE2
- JOBROLE
- STATE
- DEFAULTLOCALE
- NICKNAME
- NEWTOPOSITION
- VETERAN_SEPARATED
- SEATINGCHART
- BUSINESSPHONE

3.2.5.2   Sensitive Data

Extra graphs that are considered sensitive can be added, to which not everyone in the organization has access.

You can add graphs to the *Executive Review* page to plot against any ratings you have configured for Calibration views in this template. The *Executive Review* does not plot against all rating sources in the template. It only plots against ones with views configured for them. Check the box to enable the graph on your *Executive Review* page for this template.

- Gender
- Risk of Loss
- Impact of Loss
- Reason for Leaving

Parent topic:

Related Information

4 Configuring Calibration Features

Administrators can configure features for Calibration to meet business requirements.

There are key features you can configure for Calibration:

- **Talent Cards**: A concise profile of an employee and their talent-related attributes.
- **Email Notifications**: E-mails are sent when certain types of information are changed during a calibration session.
- **Calibration Labels**: Default labels of Calibration can be customized to reflect your business practices and culture better.
- **Calibration Alerts**: In a calibration session, if the evaluation of a subject triggers a calibration business rule, then alerts are generated to highlight the issue and to suggest a way to mitigate it.

For various settings that apply to all templates, sessions, or roles, you can use the *Managing Calibration Settings* tool.

Configuring Calibration Talent Card [page 47]
> Configure Calibration Talent Card by adding standard sections, creating custom sections, and editing existing sections.

Managing E-Mail Notification Settings [page 48]
> E-mail notifications are sent when certain types of information are changed during a Calibration session. You can manage the notifications using the *E-Mail Notification Templates Settings* tool.

Removing Subjects from Calibration Sessions [page 50]
> You can now remove subjects from all calibration sessions, including the sessons that are already in progress or those that have been activated. This feature enables you to manage individual employees' calibration information on a session basis.

Calibration Alerts [page 52]
> Setting up calibration alert rules can help decision makers avoid any unintentional bias to facilitate fair evaluation of subjects in calibration sessions.

Managing Calibration Settings [page 67]
> Edit Calibration settings using the *Manage Calibration Settings* tool.

4.1 Configuring Calibration Talent Card

Configure Calibration Talent Card by adding standard sections, creating custom sections, and editing existing sections.

Context

The added sections are viewable on talent cards in Calibration. Besides, if you've enabled Growth Portfolio and have the ▌ *Administrator* ❯ *Growth Portfolio* ❯ *View Portfolio* ▌ permission for the target population, you can view the

employee's Growth Portfolio by selecting the link in the overview section or from the dropdown menu of the talent card.

Procedure

1. Go to ▌ *Admin Center* ❭ *Manage Talent Card* ❭.
2. Choose *Calibration Talent Card*.
3. Place the cursor over each section to edit the section.
4. Scroll to the end and click *+Add a Section* to add a standard section or create custom sections.

   > **i Note**
   >
   > The Nominations section is editable for users who have *Succession Planning Permission* and ▌ *View Talent Pool Nominations* ❭ *Add/Edit/Delete Talent Pool Nominations* ❭.

5. Choose one section and click *Next* to edit the content.
6. Click *Save* to finish your configuration.

Results

You've configured Calibration Talent Card successfully, and you can open talent cards in the List view, the Bin view, and the Matrix view.

4.2   Managing E-Mail Notification Settings

E-mail notifications are sent when certain types of information are changed during a Calibration session. You can manage the notifications using the *E-Mail Notification Templates Settings* tool.

Calibration E-Mail Notifications

Template Name	Purpose	Option to Disable E-Mail Template
Notify Calibration Participants to Submit Ratings	Alerts a manager of the upcoming calibration session and notifies them that the form has yet to be routed to the designated step.	Yes
Notify Calibration Participants of Session Finalization	Alerts session participants of the finalization of the session, usually associated with "locking" of ratings and comments.	Yes

Template Name	Purpose	Option to Disable E-Mail Template
Notify Calibration Participants of Auto-Routed Forms	Alerts a manager that the form wasn't manually routed to the designated step on time. In order to activate the session, auto-routing of forms is done for them by the admin or the facilitator.	Yes
Notify Calibration Participants of Session Activation	Alerts participants of an upcoming session, which may now be visible to them within the *Calibration* tab.	Yes
Notify Calibration Rating Changes during Session Finalization	Alerts a manager when the rating of an employee has changed as a result of a finalized calibration session.	No **i Note** This e-mail is controlled in at the Calibration Template level.

Notify Calibration Participants to Submit Ratings

When an administrator or facilitator validates a session, they may see the error that some forms haven't been routed to the designated step. If they choose, they can e-mail the managers of those users to request that the forms be routed to the appropriate step. This feature is helpful if you don't want to auto-route the forms at this point in time, but you still want the process to move forward.

Notify Calibration Participants of Session Finalization

An e-mail is sent when an administrator or facilitator finalizes a session. If the administrator or facilitator doesn't want to send an e-mail to the participants and owners, they can opt out. If the participants don't have permission to see the session data within the *Calibration* tab, it isn't necessary to send them an e-mail upon session finalization.

> **i Note**
>
> If the number of subjects in a session goes beyond the threshold value, administrator or facilitator receives a generic e-mail template instead of custom e-mail template.

Notify Calibration Participants of Auto-Routed Forms

This e-mail is associated with the *Enable force route button in validation step* option in validation step found in the *Advanced* tab through ▶ *Admin Center* ❯ *Calibration* ❯ *Manage Calibration Template* ❯. The administrator or facilitator in charge of the session can send this e-mail when routing forms into the designated step. If the administrator or facilitator doesn't want to send an e-mail to the manager, they can opt out.

Notify Calibration Participants of Session Activation

This e-mail is sent when an administrator or facilitator activates a session. If the administrator or facilitator doesn't want to send an e-mail to the participants and owners, they can opt out. If the participants don't have permission to see the session data within the *Calibration* tab, it isn't necessary to send them an e-mail upon session activation.

Notify Calibration Rating Changes During Session Finalization

When ratings of employees are modified during a calibration session and the session is finalized, their manager receives an e-mail notification with the names of all their employees whose ratings have changed. Both old rating values and new rating values are included. You can disable or enable this e-mail notification at the template level. You can't disable the e-mail template itself.

4.3   Removing Subjects from Calibration Sessions

You can now remove subjects from all calibration sessions, including the sessons that are already in progress or those that have been activated. This feature enables you to manage individual employees' calibration information on a session basis.

Prerequisites

You have the Remove Subjects from Calibration Sessions permission.

Procedure

1. Go to ▶ *Admin Center* ❯ *Remove Subjects from Calibration Sessions* ❚.
2. Enter an employee name to search for sessions where they have been included as a calibration subject.

    You can also enter multiple names. The system will return the sessions that include any of the specified employees.

    When the subject is included in many sessions, you narrow down the search results by selecting a calibration template name. Then, only the sessions created with the specified template are listed.

3. Select the sessions where the subject needs to be removed and choose *Remove*.

Results

The subject has been removed from the selected sessions. The calibration results of that employee are no longer included in the sessions.

4.4 Calibration Labels

4.4.1 Text Replacement for Subjects and Participants

The Text Replacement feature can be used to replace the UI labels for Subjects and Participants.

To replace the UI labels, go to ▶ *Admin Center* ❯ *Text Replacement* ❯, update the *Replace With Text* fields corresponding to the UI labels for subjects and participants, and click *Save*.

> **i Note**
>
> On the *Text Replacement* page, you may find multiple UI labels for subjects and participants, spread across the entire page. For Calibration, you should update only the UI labels of subjects and participants that are bunched together. Kindly note that the other UI labels of subjects and participants belong to different modules in the application, which you may or may not want to update.

The updated UI labels for Subjects and Participants appear on the V12 Org chart page, the Session list page, and the ad hoc reports. But it doesn't reflect on the old Org Chart and on the setup wizard.

4.4.2 Changing Calibration Labels

Create custom labels in Calibration, instead of using default labels, to better reflect customers' business practices and culture.

Context

If customers want to customize a label, for example, the *Too New To Rate* label in calibration session, you can do so through *Manage Languages* in *Provisioning*.

> **→ Remember**
>
> As a customer, you don't have access to Provisioning. To complete tasks in Provisioning, contact your implementation partner or Account Executive. For any non-implementation tasks, contact Product Support.

Procedure

1. Go to *Provisioning*.
2. Select the company ID that you want to change with.
3. Go to *Manage Languages*.

   There's a list of language packs on the *Manage Languages* page.
4. Search for the local language of the user.
5. Click *Download default labels* to download the .csv file of all default labels.

   The .csv file contains the entire list of key values and their corresponding UI labels.
6. Open the .csv file. Search for *Too New To Rate* and replace it with a new label name you want to use.
7. Save the modified .csv file.
8. On the *Manage Languages* page, under the *Actions* column of the modified custom language pack, click *Upload custom labels*.
9. Select the modified .csv file, and click *Open*.

Results

You've successfully changed the label for *Too New To Rate*.

4.5   Calibration Alerts

Setting up calibration alert rules can help decision makers avoid any unintentional bias to facilitate fair evaluation of subjects in calibration sessions.

In a calibration session, if the evaluation of a subject triggers a calibration business rule, then alerts are generated to highlight the issue and to suggest a way to mitigate it. It is difficult to eliminate the possibility of an unconscious and unintentional bias toward subjects during a calibration process. Decision makers in the calibration process might have some blind spots that unknowingly cause a bias in their decisions. To mitigate the risk of this bias, you can alert the decision makers about such biases, directly in the system using calibration alerts. For example, calibration alerts can help decision makers conscientiously avert the effect of Leave of Absence on the performance versus potential ratings of an employee. You can help decision makers reconsider the evaluation of employees with high annual ratings but no promotions, or bring their attention to dramatic reduction in performance or potential of an employee in an underrepresented group.

Useful Tips: Points to Remember

- You can use up to three different Performance Management form templates while building a Calibration Alert rule. The inclusion of performance templates in the rule helps you compare the performance review of employees for up to three years.

> **! Restriction**
>
> You should not have multiple Performance templates, over different time periods, with the same name. If you use multiple Performance templates that have the same name, the calibration alert rules might not work as expected.

- Ensure that one of the performance templates selected for creating the rule is used for the calibration session in which the rule has been applied, so that the calibration alerts work as expected.

Prerequisites for Calibration Alerts [page 53]
>   Ensure customers' systems are properly configured to set up Calibration Alerts.

Setting up Calibration Alerts [page 54]
>   After you ensure that your system configuration supports calibration alerts, the next step is to understand the process of setting up the calibration alerts in your system.

Using Calibration Alerts [page 64]
>   Use Calibration Alerts to re-evaluate subjects to avoid possible bias in calibration process.

Ad Hoc Reports on Calibration Alerts [page 66]
>   Ad hoc reports can be used to track the generation of Calibration Alerts.

4.5.1 Prerequisites for Calibration Alerts

Ensure customers' systems are properly configured to set up Calibration Alerts.

The following checklist helps you understand the system settings required to enable Calibration Alerts:

- Ensure that you have the *Role-based Permission*, *Enable Generic Objects*, and *Enable the Attachment Manager* options selected in Provisioning.

- > **→ Remember**
  >
  > As a customer, you don't have access to Provisioning. To complete tasks in Provisioning, contact your implementation partner or Account Executive. For any non-implementation tasks, contact Product Support.

- Ensure that you have **Employee Central**, **Calibration**, and **MDF** enabled in your instance.
- Ensure that **Intelligent Services** has been enabled for your instance.
- Ensure that only one performance template has been used in the calibration template that you want to apply the Calibration alert rules to.

  > **i Note**
  >
  > If you apply calibration alert rules to a calibration template that uses multiple performance templates, then the calibration alert rules do not work as expected.

- Go to ▌ *Admin Center* 〉 *Manage Calibration Settings* 〉 *Global Settings* ▌, select *Enable Calibration Alert (Beta)*, and click *Save*. Please note that calibration alerts work only if the Fiori UI for Calibration has been enabled.

  > **i Note**
  >
  > Calibration Alert is a beta feature, and you can test it out in your Preview and Test instances. Please note that it might take some time to enable or disable the Calibration Alerts in the system. We recommend you

> to the test feature in Test and Preview before enabling it in Production, as rules can have an impact on instance performance.

- Go to ▎❯ *Admin Center* ❯ *Manage Permission Roles* ❯ *[Permission Role]* ❯ *Permission* ❯ *Metadata Framework* ❯, and enable the following permissions:

  - *Configure Object Definitions*: You need this permission to create rule types and lookup tables.
  - *Access To Business Rule Execution Log*: You need this permission to access the log that shows how business rules are executed.
  - *Configure Business Rules*: You need this permission to access the Rules Engine UI.
  - *Manage Data*: You need this permission to create *MessageDefinitions* for alert messages. You need this permission to also create *Sequence* objects for defining sequences.
    Both *MessageDefinitions* and *Sequence* objects are MDF objects.
  - *Import permission on Metadata Framework*: You need this permission to import and export data for generic objects or business rules using the *Import and Export Data* link in the Admin Center.

    > ℹ Note
    >
    > Ensure that you also enable the role-based permissions required to manage calibration templates and sessions.

Parent topic: Calibration Alerts [page 52]

Related Information

4.5.2 Setting up Calibration Alerts

After you ensure that your system configuration supports calibration alerts, the next step is to understand the process of setting up the calibration alerts in your system.

You can set up calibration alerts in your system by following these simple steps:

1. Configuring Calibration Alert Messages in the System [page 55]
   Configure alert messages to describe the nature of the calibration alerts, and to provide a solution to mitigate the alerts.
2. Configuring Calibration Alert Rules in the System [page 57]
   Configure Calibration Alert type business rules that help decision makers in the calibration sessions avoid any unintentional bias during the process.
3. Applying the Calibration Alert rules [page 63]
   Link the business rules for calibration alerts to a calibration template. The rules then apply to all the calibration sessions created from that template.

Parent topic:

Related Information

4.5.2.1 Configuring Calibration Alert Messages in the System

Configure alert messages to describe the nature of the calibration alerts, and to provide a solution to mitigate the alerts.

Context

Alert messages enable you to explain the reason an alert was triggered, and the action to be taken neutralize the alert. Each calibration alert message is linked to a calibration alert rule that it covers.

Procedure

1. Go to ▌▶ *Admin Center* ▶ *Manage Data* ▌, and in *Create New* field, select *AlertMessage*. A new alert message form appears.

2. In *externalName*, enter a name relevant to the alert message or to the alert rule it covers. For example, "Alert for LOA".

   > **i Note**
   >
   > If you leave *externalName* blank, by default, it picks up the value of *externalCode*.

3. Enter a unique *externalCode*, which is relevant to the message it conveys. For example, if you are creating an alert message for the calibration alert rule for leave of absence, you could use an external code like "Alert_LOA".

   > **i Note**
   >
   > The *externalName* and *externalCode* fields help you search for alert messages in the system. The alert message is represented as "*externalName(externalCode)*", for example, "Alert for LOA(Alert_LOA)".

4. In *effectiveStatus*, select *Active*.

5. In *alertHeaderLocalized* and *alertDescriptionLocalized*, enter a relevant title and a description for the alert message. The header and description field values of the alert message appear on the calibration session as the title of the message and **Recommendations**, respectively.

   For example, the *alertHeaderLocalized* is the title of the calibration alert message that says "Alert for Leave of Absence". The content in *alertDescriptionLocalized* forms the **Recommendations** part, which could be something like:

   "Please check whether leave of absence has caused reduction in the performance rating of the employee."

   > **i Note**
   >
   > Do not use the *alertHeader* and the *alertDescription* fields.

6. Click *Save*. The alert message is ready for use.

Example

The following table shows some sample alert messages that you can use with the "Calibration Alert" rules.

externalName	externalCode	alertHeaderLocalized	alertDescriptionLocalized
Alert for Lack of Promotion	Alert_NoPromotion	Alert for Lack of Promotion	Consider the employee with consistently high performance ratings for promotion.
Alert for LOA	Alert_LOA	Alert for Leave of Absence	Has leave of absence caused reduction in the performance rating of the employee?
Performance Reduction Alert	Alert_PerformanceReduction	Alert for Dramatic Reduction in Performance Rating	Investigate the cause for dramatic reduction in performance rating of the employee for this year, as compared to the previous year.

Task overview: Setting up Calibration Alerts [page 54]

Next task: Configuring Calibration Alert Rules in the System [page 57]

4.5.2.2 Configuring Calibration Alert Rules in the System

Configure Calibration Alert type business rules that help decision makers in the calibration sessions avoid any unintentional bias during the process.

Context

The Rules Engine helps you create "Calibration Alert" rules that allow you to enforce business logic to the calibration process in your organization. The rules, when linked to a calibration template, generate alerts in the calibration sessions created from that template. You can create multiple "Calibration Alerts" rules in your system.

Procedure

1. Go to ▌▶ *Admin Center* ❯ *Configure Business Rules* ❯, and click *Create New Rule*.
2. Select the *Calibration Alert* scenario.
3. Enter a *Rule Name* relevant to the calibration alert rule you want to create.
4. Enter a *Rule ID*.

   If left blank, by default it is same as the *Rule Name* with the spaces being replaced by underscores ("_").

   > **i Note**
   >
   > The *Rule ID* cannot contain blank spaces.

5. Enter a *Start Date* to indicate that the rule is applicable from the given date.
6. Select up to three performance review templates you want to use in the rule, if any, and click *Continue*.

   The inclusion of performance templates in the rule helps you compare the performance review of employees over different time periods. If one of the Performance templates that you select in the rule is same as the Performance template used in the calibration session in which the rule is applied, the calibration alerts work as expected.

   > **i Note**
   >
   > You should not have multiple Performance templates, over different time periods, with the same name. If you use multiple Performance templates that have the same name, the calibration alert rules do not work as expected.

7. Use the IF conditions to code your business logic and outline the user actions that trigger the calibration alert.
   - If the rule is to be triggered whenever the user changes the field or the object, select *Always True*.
   - If the rule is to be triggered when the user makes specific changes, enter one or more IF or ELSE IF conditions.

     > **→ Remember**
     >
     > - You can only use the entire set of *Personal Information* and *User ID* in *Job Information* from the *Employee Information* entity in the *IF* condition of the Calibration Alert type business rule.

- You cannot use *Alerts* and *Context* in the *IF* condition for the Calibration Alert type business rule.

8. Define how the system should react by defining one or more THEN or ELSE statements, and then click *Save*.

> → Remember
>
> You can only use *Alert Message* in *Alert* for the *Then* condition in the Calibration Alert type business rule.

Results

You have successfully created a business rule.

You can refer to the following sample business rules that can help your organization to avoid bias in the Calibration process.

Use Case 1: Creating Calibration Alert Rule for Lack of Promotion [page 58]
   Create a rule that triggers a calibration alert when employees with high performance ratings, over a considerable period like three years, are not considered for promotions.

Use Case 2: Creating Calibration Alert Rule for Leave of Absence [page 60]
   Create a rule that triggers a calibration alert when a high performing employee suddenly faces reduction in performance ratings, after taking leave of absence.

Use-Case 3: Creating Calibration Alert Rule for Dramatic Reduction in Performance [page 62]
   Create a rule that triggers a calibration alert when a high performing employee faces a dramatic reduction in performance ratings.

Task overview: Setting up Calibration Alerts [page 54]

Previous task: Configuring Calibration Alert Messages in the System [page 55]

Next task: Applying the Calibration Alert rules [page 63]

4.5.2.2.1 Use Case 1: Creating Calibration Alert Rule for Lack of Promotion

Create a rule that triggers a calibration alert when employees with high performance ratings, over a considerable period like three years, are not considered for promotions.

Procedure

1. Go to ▌▶ *Admin Center* ▶ *Configure Business Rules* ▌, and click *Create New Rule*.
2. Select the *Calibration Alert* scenario.

3. Enter a *Rule Name* that suggests the rule highlights lack of promotion. For example, your rule name can be "Lack of Promotion".

4. Enter a *Rule ID*. By default, it is Lack_of_Promotion.

> **i Note**
>
> The *Rule ID* cannot contain blank spaces.

5. Enter a *Start Date* to indicate that the rule is applicable from the given date. For example, it can be **01/01/2014**.

6. Describe the rule. For example, your *Description* could read like: "Rule to detect anyone overlooked for a promotion with high performance ratings over the past 3 years."

7. Select the performance review templates of the current year and the previous two years, and click *Continue*.

> **i Note**
>
> You should not have multiple Performance templates, over different time periods, with the same name. If you use multiple Performance templates that have the same name, the calibration alert rules will not work as expected.

8. In the *IF* condition, select the *Has Job Change Event For Period*, *is equal to*, *Boolean*, and set it to *No*.

   a. In *User*, select *Employee Information* ❭ *Job Information* ❭ *User ID* ❭.

   b. In *Start Date*, select *Date*, and in the date box, select the review start date of the oldest performance review template you have selected.

   c. In *End Date*, select *Today()*.

   d. In *Event Reason*, select *Value*, and in the next dropdown, select *Promotion (TRANPROM)*.

> **→ Remember**
>
> - You can only use the entire set of *Personal Information* and *User ID* in *Job Information* from the *Employee Information* entity in the *IF* condition of the Calibration Alert type business rule.
> - You cannot use *Alerts* and *Context* in the *IF* condition of the Calibration Alert type business rule.

9. Click the dropdown arrow at the top-right corner of the *IF* condition box, select *Add* ❭ *Expression* ❭, and in the *Join Expressions* pop-up window, select *AND* to join the expressions. Repeat this step until you have added three new expressions.

10. In each of the three expressions, add the *[Performance Template]* ❭ *Overall Performance Rating* ❭ parameter, followed by selecting =(equals), then select *Decimal*, and in the last text box, enter a high performance rating value, like **5** (on a rating scale of 5, for instance).

11. In the *Then* condition, edit the rule to select the expression *Set*. In the adjoining expression box, select *Alert* ❭ *AlertMessage* ❭ > *to be equal to* > *Value*, and in the last dropdown list, select the alert message that communicates the lack of promotion scenario.

> **→ Remember**
>
> You can only use *Alert Message* in *Alert* for the *Then* condition of the Calibration Alert type business rule.

12. Click *Save*.

   You have successfully created the business rule.

Task overview:

Related Information

4.5.2.2.2 Use Case 2: Creating Calibration Alert Rule for Leave of Absence

Create a rule that triggers a calibration alert when a high performing employee suddenly faces reduction in performance ratings, after taking leave of absence.

Procedure

1. Go to ▌▶ *Admin Center* ❯ *Configure Business Rules* ▌, and click *Create New Rule*.
2. Select the *Calibration Alert* scenario.
3. Enter a *Rule Name* that suggests the rule highlights lack of promotion. For example, your rule name can be "Leave of Absence".
4. Enter a *Rule ID*. By default, it is Leave_of_Absence.

   > **i Note**
   >
   > The *Rule ID* cannot contain blank spaces.

5. Enter a *Start Date* to indicate that the rule is applicable from the given date. For example, it can be **01/01/2016**.
6. Describe the rule. For example, your *Description* could read like: "Rule to detect if any employee performance rating has been reduced after a leave of absence."
7. Select the performance review templates of the current year and the previous year, and click *Continue*.

   > **i Note**
   >
   > You should not have multiple Performance templates, over different time periods, with the same name. If you use multiple Performance templates that have the same name, the calibration alert rules will not work as expected.

8. In the *IF* condition, select *Has Absences in Period*, *is equal to*, *Boolean*, and set it to *Yes*.

   a. In *User*, select ▌▶ *Employee Information* ❯ *Job Information* ❯ *User ID* ▌.

   b. In *Start Date*, select *Date*, and in the date box, select the review start date of the performance review template of the previous year.

c. In *End Date*, select *Today()*.

d. In *Time Types*, select *Value*, and in the next dropdown, select *Maternity Leave*.

> → Remember
>
> • You can only use the entire set of *Personal Information* and *User ID* in *Job Information* from the *Employee Information* entity in the *IF* condition of the Calibration Alert type business rule.
>
> • You cannot use *Alerts* and *Context* in the *IF* condition of the Calibration Alert type business rule.

9. Click the dropdown arrow at the top-right corner of the *IF* condition box, select ▐▶ *Add* ▶ *Expression* ◣, and in the *Join Expressions* pop-up window, select *AND* to join the expressions. Repeat this step until you have added two new expressions.

10. In one of the expressions, add the ▐▶ *[Current Year Performance Template]* ▶ *Overall Performance Rating* ◣ parameter, followed by selecting <=, then select *Decimal*, and in the last text box, enter a lower performance rating value, like **4** (on a rating scale of 5, for instance).

11. In the other expression, add the ▐▶ *[Previous Year Performance Template]* ▶ *Overall Performance Rating* ◣ parameter, followed by selecting =, then select *Decimal*, and in the last text box, enter a high performance rating value, like **5** (on a rating scale of 5, for instance).

    The *IF* condition now indicates reduction in performance rating this year, compared to the high performance rating in the previous year, after leave of absence was taken.

12. In the *Then* condition, edit the rule to select the expression *Set*. In the adjoining expression box, select ▐▶ *Alert* ▶ *AlertMessage* ◣ > *to be equal to* > *Value*, and in the last dropdown list, select the alert message that communicates the possible impact of leave of absence on the reduction in performance ratings.

> → Remember
>
> You can only use *Alert Message* in *Alert* for the *Then* condition of the Calibration Alert type business rule.

13. Click *Save*.

    You have successfully created the business rule.

Task overview: Configuring Calibration Alert Rules in the System [page 57]

Related Information

4.5.2.2.3 Use-Case 3: Creating Calibration Alert Rule for Dramatic Reduction in Performance

Create a rule that triggers a calibration alert when a high performing employee faces a dramatic reduction in performance ratings.

Procedure

1. Go to ▶ *Admin Center* ❯ *Configure Business Rules* ◀, and click *Create New Rule*.
2. Select the *Calibration Alert* scenario.
3. Enter a *Rule Name* that suggests the rule highlights lack of promotion. For example, your rule name can be "Dramatic Reduction in Performance".
4. Enter a *Rule ID*. By default, it is Dramatic_Reduction_in_Performance.

   > **i Note**
   >
   > The *Rule ID* cannot contain blank spaces.

5. Enter a *Start Date* to indicate that the rule is applicable from the given date. For example, it can be **01/01/2016**.
6. Describe the rule. For example, your *Description* could read like: "Rule to detect if a previous high performer has now been moved down dramatically."
7. Select the performance review templates of the current year and the previous year, and click *Continue*.

   > **i Note**
   >
   > You should not have multiple Performance templates, over different time periods, with the same name. If you use multiple Performance templates that have the same name, the calibration alert rules will not work as expected.

8. In the *IF* condition, select the ▶ *[Current Year Performance Template]* ❯ *Overall Performance Rating* ◀ parameter, followed by <=, *Decimal*, and in the last text box, enter a lower performance rating value, like **2** (on a rating scale of 5, for instance).

   > **→ Remember**
   >
   > • You can only use the entire set of *Personal Information* and *User ID* in *Job Information* from the *Employee Information* entity in the *IF* condition of the Calibration Alert type business rule.
   > • You cannot use *Alerts* and *Context* in the *IF* condition of the Calibration Alert type business rule.

9. Click the dropdown arrow at the top-right corner of the *IF* condition box, select ▶ *Add* ❯ *Expression* ◀, and in the *Join Expressions* pop-up window, select *AND* to join the expressions.
10. Select the ▶ *[Previous Year Performance Template]* ❯ *Overall Performance Rating* ◀ parameter, followed by selecting >=, then select *Decimal*, and in the last text box, enter a high performance rating value, like **4** (on a rating scale of 5, for instance).

    The *IF* condition now indicates dramatic reduction in performance rating this year, compared to the high performance rating in the previous year.

11. In the *Then* condition, edit the rule to select the expression *Set*. In the adjoining expression box, select
▶ *Alert* ❯ *AlertMessage* ❯ > *to be equal to* > *Value*, and in the last dropdown list, select the alert message that communicates the dramatic reduction in performance.

> → Remember
>
> You can only use *Alert Message* in *Alert* for the *Then* condition of the Calibration Alert type business rule.

12. Click *Save*.

    You have successfully created the business rule.

Task overview: Configuring Calibration Alert Rules in the System [page 57]

Related Information

Use Case 1: Creating Calibration Alert Rule for Lack of Promotion [page 58]
Use Case 2: Creating Calibration Alert Rule for Leave of Absence [page 60]

4.5.2.3 Applying the Calibration Alert rules

Link the business rules for calibration alerts to a calibration template. The rules then apply to all the calibration sessions created from that template.

Context

The calibration alert rules are applied to the calibration template. You can apply multiple rules to a single template. Ideally, you apply the calibration alert rules before the calibration sessions are created. However, if you already have existing calibration sessions, ensure that you deactivate and reactivate your sessions after applying the rules to the calibration template.

Procedure

1. Go to ▶ *Admin Center* ❯ *Manage Calibration Templates* ❯ .
2. Select a calibration template, and go to the *Advanced* tab.
3. In the *Rules* dropdown list, select the calibration alert rules that you want to apply.
4. Click *Save*.

   Now, when you create calibration sessions using this template, and then activate the sessions, an asynchronous job for applying the rules to the sessions is triggered. Once the rules have been applied to the session and the job is complete, you get e-mail notification.

5. However, if you already have sessions created before the rules were applied to the template: when you click *Save*, on the confirmation message that appears, click *Yes*.

> i Note
>
> The confirmation message shows the names of the affected sessions. Remember to deactivate and reactivate the affected sessions.

Results

The calibration alerts are now ready for use.

> → Remember
>
> To ensure that the calibration alert rules are properly applied to the sessions, deactivate, and reactivate the affected calibration sessions each time, when:
>
> • You edit or delete a rule linked to the calibration template.
> • You link a new rule, or remove an existing rule from the calibration template.

Next Steps

To deactivate and reactivate the calibration session,

1. Go to ▶ *Admin Center* ❯ *Manage Calibration Sessions* ❯.
2. To deactivate the session, select the session, click *Deactivate*, and on the confirmation message, click *Yes*.
3. To reactivate the session, select the *Validation* tab, click *Activate*, and on the confirmation message, click *Yes*.

The job to create the calibration alerts is scheduled immediately after the session is activated.

Task overview: Setting up Calibration Alerts [page 54]

Previous task: Configuring Calibration Alert Rules in the System [page 57]

4.5.3 Using Calibration Alerts

Use Calibration Alerts to re-evaluate subjects to avoid possible bias in calibration process.

Context

During the calibration process, it may sometimes be difficult to eliminate the possibility of an unconscious and unintentional bias toward subjects during a calibration process. Decision makers in the calibration process might

have some blind spots that unknowingly cause a bias in their decisions. To mitigate the risk of this bias, you can alert the decision makers about such biases, directly in the system using calibration alerts. In calibration sessions with calibration alert rules applied to it, whenever the evaluation of a subject triggers a rule, the calibration alerts appear for that subject.

> → Remember
>
> To ensure that the calibration alert rules are properly applied to the session, deactivate, and reactivate a calibration session each time, when:
>
> - You edit or delete a rule linked to the calibration template used for creating the calibration session.
> - You link a new rule, or remove an existing rule from the calibration template used for creating the calibration session.

Procedure

1. Go to *Calibration*, and select a session that has calibration alerts applied to it.
2. Start evaluating the subjects, and click *Save*. If your changes are saved without any message, it indicates that the evaluation was successfully done without triggering any calibration alert.
3. If the evaluation triggers any alerts, the *Results from Alerts Regeneration* pop-up message appears. It shows the list of subjects that have been impacted. Click *OK*.
4. On the calibration session view, click each alert icon to understand the reason the alert was generated.
5. To clear the alerts, you can refer to the recommendations provided in the alert messages to update the ratings for the concerned subjects, and click *Save*.

   > i Note
   >
   > After you click *Save*, the subjects undergo a re-evaluation for the applied rules. Your updates either clear the alerts, retain the alerts, or add new alerts for the calibration subjects.

6. The *Results from Alerts Regeneration* pop-up message shows the list of subjects for which the alerts were removed or added. If you still have active alerts, repeat the previous step until you clear the significant alerts.

   > i Note
   >
   > You can try to clear the alerts based on a "best effort" approach. This means, you may or may not choose to clear all the alerts.

Results

The evaluation of calibration subjects within a session guarded with rules helps the decision makers perform a bias-free calibration.

Task overview: Calibration Alerts [page 52]

Related Information

4.5.3.1 Regenerating Calibration Alerts

The *Regenerate Alerts* option enables you to re-evaluate the rules applied to the calibration session, and it regenerates the calibration alerts.

A job for alert regeneration begins, and you can click the *Notifications* icon on the application header to monitor the status of the job.

> **i Note**
>
> Regeneration of alerts may need several minutes. Once the "Refresh Alert Completion" notification appears in the Notification area, reload the page and the regenerated alerts appear on the screen.

> **⚠ Caution**
>
> Do not edit the Calibration sessions, until the *Notifications* on the application header confirms that the job for regenerating the alerts is complete. If you, or anyone else, updates the session while the regeneration of alerts is in progress, some of the alerts might get corrupted.

4.5.4 Ad Hoc Reports on Calibration Alerts

Ad hoc reports can be used to track the generation of Calibration Alerts.

You can report on Calibration Alert changes by including the **Audit Data Type** field in the "Calibration" and "Calibration Activity" types of Ad hoc reports.

Create ad hoc reports of definition type "Calibration" or "Calibration Activity", and while selecting columns, select "Audit Data Type" as a field in the report. When you generate the report, the calibration alerts changes appear as "Alert" within the "Audit Data Type" field of the report.

For more information on creating ad hoc reports, refer to the Ad Hoc Report Builder Administration guide.

Parent topic: Calibration Alerts [page 52]

Related Information

4.6   Managing Calibration Settings

Edit Calibration settings using the *Manage Calibration Settings* tool.

Prerequisites

You're granted the permission ▌▶ *Manage Calibration* ❯ *Manage Calibration Settings* ▌.

Context

By using the tool, you can:

- Grant permission to session reviewers to edit sessions in progress or approved sessions.
- Choose a calibration template as manager template.
- Define default filters for filter function across all views of calibration session, including Executive Review.
- Define which fields are returned by default in the search result table of people search function and which fields can be selected additionally in the settings option.
- Add or remove tools for Calibration.

Procedure

1. Go to *Admin Center*.
2. Choose ▌▶ *Admin Center* ❯ *Manage Calibration Settings* ▌.
3. Go to different tabs to edit settings.
4. Click the *Save* in the upper left corner.

   You can click the *Cancel* button in the upper left corner to revert all the changes made in different tabs.

Results

You have changed Calibration settings successfully.

4.6.1 Global Settings

The *Global Settings* tab in the Managing Calibration Settings tool includes various settings that apply to all templates, sessions, or roles.

Global Settings

Setting	Description
Enable Enforce Comment Option in Views	Enables the option to enforce comments when a rating is changed. You can enable or disable this option for each calibration template.
Enable Manager Calibration Session	Enables the option for managers to create their own sessions, without administrative privileges.
Show In-Progress Calibration Ratings in Live Profile	If you enable this option, Calibration ratings that haven't yet been finalized appear in the Profile.
Enable Reverse Scale	If the customer is using a reverse scale (1 is the highest rating), this feature should be enabled to adjust the Calibration views accordingly.
Limit Employee to be included in only one calibration session at a time	Employees can't participate in multiple sessions that are in-progress, approving, or approved of the same date range and data source. Don't enable this feature if the customer process requires overlapping sessions. For example, Performance Review and Talent Review. → Tip After you enable this setting, if you try to add a subject, who has been already added to another session, an error message appears and you can't activate the session. However, if you don't enable this setting, and try to add a subject who is in another session, a warning message appears, but you can activate the session.
Enable Calibration Executive Review	Enables the Executive Review feature. With permission, Executive Reviewers see aggregate session data without being involved directly in each session.
Launch Calibration From PM v12 Team Overview	Enables the option to have managers create sessions directly from the Team Overview tab for PM v12 forms.
Remove "Too New to Rate" from rating options for the rating types from People Profile data	Select if you don't use "Too New to Rate" as a rating option for the rating types from People Profile data in calibration sessions. After enabling this setting, you can still see the "Too New to Rate" ratings that are pulled into calibration sessions from original data sources, but you cannot use it as rating option.

Setting	Description
Exclude Rating Sources from Employee Profile Data	Chooses rating sources that you want to exclude from the Employee Profile data. Rating sources you selected aren't considered when the session is activated.
Online Export All Threshold	Exports sessions based upon the current filter criteria. Default threshold of 250 can be modified.
Online Mass Finalization Threshold	Finalizes multiple sessions online. The default threshold of 25 can be modified.
Add an extra field to people card shown in 9-box view	Chooses a field from the dropdown list to add it to people card shown in 9-box view.
Choose one or more users to replace a calibration session's only facilitator who has been inactive	Choose one or more active users to replace a calibration session's only facilitator who has been inactive when purging the inactive user. i Note If the chosen user is set to inactive later, you cannot replace a calibration session's only facilitator with the user.
Choose one or more users as default facilitators for a new manager calibration session	Choose one or more active users as default facilitators in addition to the session creator when creating a new manager calibration session. The configured facilitators can still be removed from the Session Facilitators field, if desired.

5 Creating Calibration Sessions

A single session can be created in Admin Center or on the Team Overview of Performance Management. Multiple calibration sessions can be created with a CSV file in Admin Center.

	Single Session	Mass Sessions
Who can initiate the creation?	With proper permissions, both managers and Admins can create calibration sessions.	Admins can create multiple calibration sessions with a CSV file in one go.
Where do managers or Admins create sessions?	• Admins can create sessions one by one through ▶ *Admin Center* ❯ *Calibration* ❯ *Manage Calibration Sessions* ❯. • Managers with proper permissions can create calibration session directly in Calibration. Creating Manager-Initiated Calibration Session [page 83] • Managers with proper permissions can create calibration session on the Team Overview tab of Performance Management. Launching Sessions in Team Overview [page 97]	Admins can create multiple sessions through ▶ *Admin Center* ❯ *Calibration* ❯ *Mass Create Calibration Sessions* ❯.
When to use this type of session creation?	• When an Admin only wants to create one or a few calibration sessions, Admins can use the *Manage Calibration Sessions* tool to create calibration sessions. • When a manager wants to initiate a simple and quick calibration session. • When a manager wants to initiate a simple and quick calibration session when reviewing the performance of team members in Performance Management.	When an Admin has to create multiple calibration sessions.
What are validated?	The validation step verifies whether all requirements have been met. Validation [page 82]	• There are two validation steps in mass sessions creation: validating file and validating sessions. Validating File and Validating Sessions [page 93] • If there are errors in validating sessions in mass sessions, Admins still have to fix the errors in each individual session.

Settings Before Creating Calibration Sessions [page 71]

Before creating calibration sessions, admins can configure certain session settings to meet company's business requirements.

5.1   Settings Before Creating Calibration Sessions

Before creating calibration sessions, admins can configure certain session settings to meet company's business requirements.

There are key settings that can be configured before creating new calibration sessions:

- Action Permissions: Set up the permissions of roles for ongoing and approved calibration sessions.
- Search Results: Define fields you want to display as search results when setting up a calibration session.
- Rating Types: Exclude one or more rating types of People Profile data source from calibration sessions.

Parent topic: Creating Calibration Sessions [page 70]

Related Information

5.1.1 Action Permissions in Calibration Settings

Admins can manage the Read, Write, Finalize, Export, and Delete permissions of user roles for ongoing and approved calibration sessions.

The user roles that work with calibration sessions include facilitator, co-facilitator, owner, participant, and executive reviewer. Using the *Permissions* tab, you can configure the actions that these roles can perform on the ongoing and approved calibration sessions. All you need to do is go to ▶ *Admin Center* ▶ *Manage Calibration Settings* ▶ *Permissions* ◀, enable the required permissions, and click *Save*.

Calibration Session Action Permissions

Roles	Action Permissions for In Progress Calibration Session					Action Permissions for Approved Calibration Session		
	Read	Write	Finalize	Export	Delete	Read	Export	Delete
Facilitator	X	X	X	X	X	X	X	X
Co-facilitator	X	X	X	X	X	X	X	X
Owner	X	X	X	X		X	X	
Participant	X	X	X	X		X	X	
Executive Reviewer	X	X	X	X		X	X	

> **i Note**
>
> When you don't enable a certain permission for a particular role, the role is restricted from performing the relevant action in the ongoing or approved calibration session. So, by using the *Permissions* tab, you can configure the capabilities of a role in the calibration sessions.

Action Permission Interdependencies

- For ongoing calibration sessions, permissions granted to the Facilitator role are automatically enabled for the co-facilitator role. Likewise, if you want to remove permissions from the co-facilitator role, you must remove the permissions from the Facilitator role first.
- For both ongoing and approved calibration sessions, the Read permission is required for all the other permissions to work. So, when you enable any permission for a role, the Read permission is automatically enabled.
- The Finalize permission needs both the Read and the Write permissions. So, when you enable the Finalize permission for a role, both the Read and the Write permissions are automatically enabled.

- If you want to remove lower-level action permissions from a role, you need to first remove all higher-level action permissions from the role. For example, if you want to remove the Read permission to ongoing sessions of the Facilitator role, you need to remove Delete, Export, Finalize, and Write permissions of the facilitator role first.
- If a user is an owner, facilitator, co-facilitator, or participant of a session and the role has the Read permission, the user can see the Calibration tab in order to access the session.

5.1.2 Defining Search Results for People Search

Define the fields you want to display as search results when setting up or creating a calibration session.

Procedure

1. Go to ▌▶ *Admin Center* ❯ *Calibration* ❯ *Manage Calibration Settings* ❯.
2. Go to the *Search and Filter Fields* tab.
3. Select the fields in the *Include Search Result Fields* column.
4. Select the fields in the *Default Search Result Fields* column.

   For a field to be selected in the *Default Search Result Fields* column, it must first be selected in the *Include Search Result Fields* column. If a field is selected in the *Include Search Result Fields* but not in the *Default Search Result Fields* column, you can further configure show it using the settings on the *People* tab.
5. Click *Save*.

Results

When setting up or create a calibration session, you can see the configured fields displayed in searching results and settings under the *People* tab.

5.1.3 Excluding Rating Types from Calibration Sessions

Exclude one or more rating types of People Profile data.

Prerequisites

The data source configured in the calibration session template is People Profile.

Context

If the data source of your calibration session is People Profile, admins can exclude one or more rating types from the session. For example, if you only want ratings from previous calibration sessions within the review period, you can exclude Performance Management, 360 Reviews, and Live Profile ratings in Admin Center.

Procedure

1. Go to ▌▶ *Admin Center* ❯ *Calibration* ❯ *Manage Calibration Settings* ❯.
2. Go to the *Global Settings* tab.
3. Select rating types that you want to exclude under the *Exclude Rating Sources from Employee Profile Data*.

   If you select all the four rating types, a warning displays. You can proceed to create calibration sessions, but no rating will be pulled into your sessions.
4. Click *Save*.

Results

You have excluded the selected rating types from entering calibration sessions.

5.1.4 Defining Default Filters in Admin Center

Define filters in Admin Center for all views of a calibration session and Executive Review.

Context

After you define the filters, users can use them to filter results in a calibration session. If no filters are defined in Admin Center, only the Discussed option is available for the filter function since it's predefined as a default filter that you can use without any configuration. In Executive Review, in addition to the Discussed option, users can always use the filters of Calibration Sessions and Owners to filter out the results they want.

Currently, the standard elements using the following ids can be displayed on the *Search and Filter Fields* tab:

- firstName
- mi
- lastName
- userId
- title
- country

- username
- managerId
- division
- department
- location
- status
- email
- jobCode
- gender
- level
- riskOfLoss
- impactOfLoss
- reasonForLeaving
- From custom01 to custom15
- newToPosition
- futureLeader
- keyPosition
- matrixManaged

Procedure

1. Go to ▌ *Admin Center* ❭ *Manage Calibration Settings* ❭.
2. Go to the *Search and Filter Fields* tab.
3. In the *Filter Fields* column, select the fields you want to define as filters.
4. Save your changes.

Results

Users can use the filters defined to filter results across all calibration views.

5.2   Data Requirements for Creating Calibration Sessions

When creating calibration sessions, you need to make sure that data from different sources are qualified to be calibrated.

Data failing to meet the requirements cannot pass validation, and consequently calibration sessions cannot be created. Therefore, make sure you have configured data correctly before you integrate the data with Calibration.

The source of the calibration data comes from the Performance Management, People Profile Data, Compensation, and Succession components. The requirements are different for the data sources. Check the following table for more details.

Requirements for Data from Different Sources

Data Source	Details
Performance Management	Requirements for Performance Management Configuration [page 76]
Compensation	Requirements for Compensation Configuration [page 77]

Requirements for Performance Management Configuration [page 76]
    Certain settings must be configured in Performance Management for Calibration.

Requirements for Compensation Configuration [page 77]
    Certain settings must be made in Compensation (CMP) for Calibration.

Parent topic: Creating Calibration Sessions [page 70]

Related Information

Settings Before Creating Calibration Sessions [page 71]
Creating a Calibration Session in Admin Center [page 78]
Creating Manager-Initiated Calibration Session [page 83]
Overview of the Process for Creating Multiple Calibration Sessions [page 86]
Overview of the Process for Creating a Calibration Session in Team Overview [page 94]

5.2.1 Requirements for Performance Management Configuration

Certain settings must be configured in Performance Management for Calibration.

> → Remember
>
> As a customer, you don't have access to Provisioning. To complete tasks in Provisioning, contact your implementation partner or Account Executive. For any non-implementation tasks, contact Product Support.

Requirements for Performance Management configuration:

- Route map must have at least one single user or collaborative modify step. Iterative and signature steps are not supported.

  > i Note
  >
  > When a session is activated, the Performance Management form owner is noted down in Calibration. However, if Calibration is in a collaborative step of the performance review process, when there is manager

> change and rating change, the information is not updated in Calibration. Because a collaborative step has at least two step owners, it can lead to rating saving issues.

- PM form must have manual ratings configured for the *Performance*, *Potential*, *Overall Objective*, and *Overall Competency* for Calibration to be able to use them.
- Manual ratings allow you to drag and drop users in the session. If the form is configured with only calculated ratings, drag and drop functionality is not usable.
- Section and Field permission settings:
  - If you want to edit the form directly from the calibration session, permissions must be adjusted. If the calibration session users are not directly involved in the route map, they may not have permission to view or edit all the necessary elements.
  - If you have the *Write* permission for in-progress sessions, you can see an option for editing Performance Management form of a subject in the action menu next to the name card of the subject. However, whether you can actually edit the performance rating is further determined by the permission configuration in the Performance Management template.

In addition, the PM form must have one of the following ratings enabled:

Rating Type	Section
Overall objective rating	`objcomp-summary-sect`
Overall competency rating	`objcomp-summary-sect`
performance rating	• `customized-weighted-rating-sect` • `perfpot-summary-sect`
potential rating	`perfpot-summary-sect`

For further information on configuring performance management form templates, see the Performance Management implementation guide.

5.2.2 Requirements for Compensation Configuration

Certain settings must be made in Compensation (CMP) for Calibration.

> → Remember
>
> As a customer, you don't have access to Provisioning. To complete tasks in Provisioning, contact your implementation partner or Account Executive. For any non-implementation tasks, contact Product Support.

Requirements for Compensation (CMP) configuration:

- Route map must have at least one single user or collaborative modify step. Iterative and signature steps are not supported.
- CMP form must have the item to be calibrated present on the form to be available in the session. For example, if you wish to see the benchmark (Range Penetration or Compa-Ratio), you must be careful to include the two valid benchmarks of "Final Range Penetration" or "Final Compa-Ratio" versus "(Current) Range Penetration" or "(Current) Compa-ratio".
- As compensation recommendations are not discrete values, drag and drop functionality is by default disabled for compensation elements.

- Edits made to the Compensation Form are immediately available when looking at Compensation Executive Review. However, edits made to ratings on a PM form are not immediately visible in Compensation Executive Review. PM form edits are visible when either the Compensation Form is opened and save, or the Mass Update Forms process is run.

For further information on configuring performance management form templates, see the Compensation implementation guide.

5.3 Creating a Calibration Session in Admin Center

Create a single session in *Admin Center*.

Prerequisites

- The *Manage Calibration Sessions* permission is granted.
- The session owner has two-level-down reports.
- The *User Search* permission is granted and the users involved in the session are in the target population.

> i Note
>
> To ensure that session reviewers can have permissions to reach all users in the session, it's advisable to set the target population of all employees for the granted reviewers.

Context

For admins who only want to create a single or a few sessions, you can use the *Manage Calibration Sessions* tool. For managers who also want to a single session, you can use the Manager Calibration Sessions function, see Creating Manager-Initiated Calibration Session [page 83]. Alternatively, you can also create a session in the *Team Overview* page, see Launching Sessions in Team Overview [page 97].

Procedure

1. Go to ▌ *Admin Center* ❯ *Calibration* ❯ *Manage Calibration Sessions* ▌.
2. Choose *Create New*.
3. Fill in the required fields in the *Basic Info* tab and choose *Save*.
4. Review selected users in the *People* tab.

   At lease one subject should be specified.

5. Go to *Validation* tab to validate the session.

Results

A new session is created. You can find it in the *Sessions* list of Calibration.

Task overview: Creating Calibration Sessions [page 70]

Related Information

Settings Before Creating Calibration Sessions [page 71]
Data Requirements for Creating Calibration Sessions [page 75]
Creating Manager-Initiated Calibration Session [page 83]
Overview of the Process for Creating Multiple Calibration Sessions [page 86]
Overview of the Process for Creating a Calibration Session in Team Overview [page 94]

5.3.1 Basic Info

Many session details are collected in the *Basic Info* tab when setting up a calibration session.

Basic Info Details

Value	Description	Required
Template	A picklist of the available Calibration templates. Only active templates that the user has permission to create appear here. The session is based on the template selected.	Yes
Session Name	A unique and descriptive name for the session. It is recommended that users consider including as much detail as possible in the name. Consistency across session names is also recommended. It helps in reporting and administration of Calibration.	Yes
Planned Activation Date	The date specified is recorded in the system. The Planned Activation Date must be before the Session Date.	No

Value	Description	Required
Session Date	The start date that the session is held.	No
Location	Optional field if the user wishes to record the physical location of the calibration session.	No
Sessions Owners	Name of the users that are designated as owners of the session. Based on the username and current hierarchy an owner can select session subjects and participants automatically. Participants are users 1 level down from the owner. Subjects are users 2 levels down from the owner.	Yes
Session Facilitators	By default the username of the admin creating the session. You can replace the name or add extra facilitators here.	No
Add Attachment	If enabled, users can see a file that is attached to the session. For example, guidelines or data to help the participants prepare for the session. i Note You can view all these documents and download them in ▶ *Admin Center* ❭ *Manage Documents* ❭.	No

5.3.2 People

The *People* tab is used to add participants and subjects to the session.

Employees display in your search results can be added as participants, however, only the employees in the target population of your permission role can be added as subjects.

The *Select subjects and participants automatically according to the owners* option is checked by default in the *Basic Info* tab. It means if you designate an owner, the direct reports to the owner are automatically the participants of the calibration session. The direct reports to the participants are the subjects of the calibration session.

If you want to add other people to the calibration session, you can use the *Use Advanced Search* or *Use Org Chart* options. There's no limitation as to how many levels of subjects can be added to the calibration session.

 i Note

It may be helpful to use a combination of the automatic hierarchical population of the session owner along with the Advanced Filter and Org chart to populate the session.

Search by Filter

Under the *People* tab, the *Search By Filter* option is selected by default. Here you can filter employees by Division, Department, Location, and Custom filters, or use other identifiers to seek the employees you want to add as participants or subjects. However, if you want to search for employees who have global assignments or concurrent employment, you must enable ▌▶ *Admin Center* ❯ *Manage Calibration Templates* ❯ *Advanced* ❯ *Include inactive users* ▐ first.

Search by Group

The *Search By Group* option enables you to search for employees using the permission groups defined in your organization. To access permission groups, go to ▌▶ *Username* ❯ *Options* ❯ *Groups* ▐. You can either use any of the existing permission groups, or create a group, if necessary. The permission groups available on the *Groups* tab of the *Options* page are available in the *Search By Group* option.

Use Org Chart

The administrator can also use the *Org Chart* to search for users. They can search for users and designate them as Participant, Subject, or Not In Session. They can also designate that the entire organization of the user as subjects in the session. If employees are matrix reports in an Org Chart, they can't be added as subjects. However, you can add them as subjects via the Org Chart they display as direct reports at any level.

> **→ Tip**
>
> An on-screen notification has been added to indicate that the target population validation is in effect.

5.3.3 Validation

The *Validation* tab is used to validate whether all requirements for activating the session have been met.

If you have made recent changes, you must click *Save* in order to run the validation. The system verifies whether all requirements have been met. If they have, you can successfully activate the session at this point. If all requirements haven't been met, you may see error messages.

> **i Note**
>
> The Participant field isn't mandatory. You can leave the participants list empty while creating a calibration session.

Common Error Messages

Error Message	Cause	Resolution
Subjects don't have forms.	You're calibrating Performance forms and a form doesn't exist for the subject.	Create a form for the subject or remove them from the session.
Subjects have forms not yet routed to calibration.	You're calibrating Performance forms and forms haven't been routed to the specified calibration route map step.	Use the Route Forms to Calibration option (if enabled) to push forms to the Calibration step.
Subjects are in another session.	You've enabled the global setting to *Limit Employee to be included in only one calibration session at a time*	Remove the subject from one of the sessions, or change the global setting to allow subjects in multiple sessions.

Common Warning Messages

Warning Message	Cause	Resolution
Subjects have already been selected in other sessions.	You've selected the users as subjects in other sessions that are created using the templates with the same data range and data source.	Use a different template with different data range or data source, or remove the users from the session.
Users are inactive.	The users are in inactive status.	Change the user status to active, or remove the users from the session.

5.4 Creating Manager-Initiated Calibration Session

Managers can create simple sessions for their direct reports or lower levels of reports.

Prerequisites

- The *Enable Manager Calibration Session* option is enabled in ▎▶ *Admin Center* ❯ *Calibration* ❯ *Manage Calibration Settings* ▐.

  When enabled, managers by default can create sessions with any available calibration template. If you want to restrict the template access during session creation, you can use the Manager Template Permission for Creating Calibration Sessions permission to specify which calibration templates managers can access when they create calibration sessions.
- Managers using the Manager Calibration Sessions function have at least one level of direct reports.

Context

Managers can create team-specific sessions that match their business cycle and organizational development needs.

Procedure

1. Go to ▎▶ *Calibration* ❯ *Sessions* ▐.

   Managers see the *Create New* button, next to the *Export* icon.
2. Click the *Create New* button.

   A *New Session* popup window shows.
3. Fill in information for the new session.

Item	Description
Template	Select a Calibration template for the new session.
	→ Recommendation It's recommended to use clear template names to indicate which templates are for manager-initiated sessions.
Session Name	Enter a name for the new session.

Item	Description
Session Facilitators	The default facilitators configured through ▶️ *Manage Calibration Settings* > *Global Settings* are displayed in the field in addition to the session creator. Managers can remove the default facilitators and add desired facilitators.
Session Participants	Select direct reports as session participants.
Session Subjects	Select levels of reports as session subjects.

4. Click *Create New*.

   A popup window displays, informing you that the session has been successfully created. You can either go to the new session by clicking *OK*, or close the window and stay on the *Sessions* page by clicking *NO*.

Results

The newly created team-specific calibration session is displayed in your session list.

Task overview: Creating Calibration Sessions [page 70]

Related Information

5.4.1 Enabling Manager Calibration Session

Enable the *Enable Manager Calibration Session* tool to let managers initiate simple sessions for their direct reports all levels down.

Context

When enabled, managers by default can create sessions with any available calibration template. If you want to restrict the template access during session creation, you can use the Manager Template Permission for Creating Calibration Sessions permission to specify which calibration templates managers can access when they create calibration sessions.

Procedure

1. Go to ▎▶ *Admin Center* ❯ *Calibration* ❯ *Manage Calibration Settings* ◗.
2. Go to the *Global Settings* tab.
3. Select the *Enable Manager Calibration Session* option.
4. Click *Save*.
5. (Optional) Go to *Manage Permission Roles*, under ▎▶ *User Permissions* ❯ *Calibration* ❯ *Manager Template Permission for Creating Calibration Sessions* ◗, specify the templates that the managers can see when they create calibration sessions.

Results

You've successfully turned on Manager Calibration Sessions. Managers can now see the *Create New* button and create sessions directly in Calibration.

5.4.2 Setting Up Default Facilitators for Manager-Initiated Sessions

Set up default facilitators for newly created manager-initiated calibration sessions so that the specified facilitators can have access to the manager-initiated sessions as well.

Prerequisites

You're granted the permission ▎▶ *Manage Calibration* ❯ *Manage Calibration Settings* ◗.

Context

For certain roles, for example, HR, they want to access the manager-initiated sessions so as to understand the competencies and expectations of employee behavior. To meet the business needs, administrator can set up the default facilitator, and the configured users are regarded as co-facilitators for each new manager-initiated calibration session. In the meantime, managers still have the option to remove the default facilitators.

Procedure

1. Go to ▌ *Admin Center* ❯ *Manage Calibration Settings* ❯ *Global Settings* ❯.
2. Go to *Choose one or more users as default facilitators for a new manager calibration session* and enter users' names.

   Make sure that the entered users are active.
3. Save your changes.

Results

The configured facilitators are displayed in the *New Session* dialog window. Managers can still remove the default facilitators and add desired facilitators.

5.5 Overview of the Process for Creating Multiple Calibration Sessions

Admins can create, validate, and activate sessions in bulk.

> **i Note**
>
> You can bulk activate calibration sessions with five simple steps. Hover on each step for a description. Click the step for more information.

Upload File → Validate File → Create Sessions → Validate Sessions → Activate Sessions
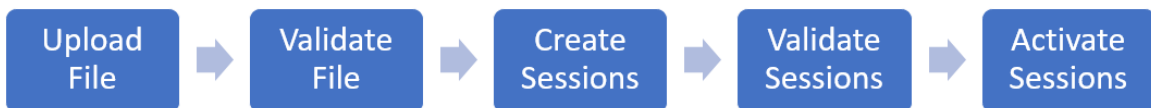
- Uploading Multiple Calibration Sessions [page 87]
- Validating Imported File [page 89]
- Creating Multiple Calibration Sessions [page 90]
- Validating Multiple Calibration Sessions [page 91]
- Activating Multiple Calibration Sessions [page 92]

1. Uploading Multiple Calibration Sessions [page 87]

Upload a CSV file with all the information for calibration sessions as the first step to create multiple calibration sessions.

2.
   Validate the CSV file before creating sessions based on the file.

3.
   Create multiple calibration sessions using the validated CSV file in one go.

4.
   Validate multiple calibration sessions by session IDs in one go.

5.
   Activate multiple calibration sessions by session IDs in one go.

6.
   There are two validating steps in mass create calibration sessions: validating the CSV file and validating the sessions. Here is the comparison between the two steps.

Parent topic:

Related Information

5.5.1 Uploading Multiple Calibration Sessions

Upload a CSV file with all the information for calibration sessions as the first step to create multiple calibration sessions.

Prerequisites

- Calibration is enabled in your instance.
- The *Mass Create Calibration Sessions* permission is enabled.
- Calibration templates are ready.

Procedure

1. Go to ▌ *Admin Center* › *Calibration* › *Mass Create Calibration Sessions* ▌.
2. Download the *file template*.

   It's always a good practice to download the latest file template before creating multiple calibration sessions. The first row in the file template is the header that shows all the session attributes. The second row describes the system column names. Don't change the names or the order of the columns in the first row.
3. Fill in the file. Each row is a record and contains information about a calibration session.
   - The required fields are: Session Name, Template, and Owners.
   - If you have multiple owners, use the pipe delimiter ("|") to separate the names. This applies to facilitators and participants too.
   - If no facilitator is designated in the file, the default facilitator is the person who uploads the file template and triggers the multiple session creation.

   > **i Note**
   >
   > Make sure you enter the correct template names in the CSV file. Otherwise, you can't create corresponding calibration sessions. For example, if you accidentally add or omit a space in the beginning or the end of the template name, all the relevant calibration sessions can't be created.

4. Save your file.
5. You can add subjects and participants according to the owners automatically by selecting the *Select subjects and participants automatically according to the owners.* option.

   You don't have to fill in every participant and subject manually in the file. However, if you don't select this option, you must fill in the file with all the participants and subjects.
6. Click *Choose File* to upload the prepared file.

   The import doesn't support incremental loading. For example, adding more subjects.
7. Click *Open*.

Results

You've successfully uploaded the file for mass session creation.

Next Steps

You can now go on to validate the uploaded file.

Task overview: Overview of the Process for Creating Multiple Calibration Sessions [page 86]

Next task: Validating Imported File [page 89]

5.5.2 Validating Imported File

Validate the CSV file before creating sessions based on the file.

Prerequisites

- The *Mass Create Calibration Session* permission is enabled.
- You have uploaded the CSV file.

Procedure

1. Go to ▌▶ *Admin Center* ❯ *Calibration* ❯ *Mass Create Calibration Sessions* ▌.
2. Click *Validate Import File*.

   A system message displays, informing you that the validation has been submitted.
3. An email notification is received when the validation job is done, confirming whether the file is okay to load, or has errors you must fix.

   The email notification contains detailed information about validation results. You can make necessary correction to the file according to the email.

   > **i Note**
   >
   > If there is inconsistent information between the csv file and the automatic importing results, you can proceed to create sessions. But please note that the system adopts information from the csv file when there is a conflict. For example, when an employee is a subject in the csv file but a participant through automatic importing, the system decides that the employee is a subject.

Results

You have successfully validated the imported file.

Next Steps

You can go on to create multiple calibration sessions based on the validated file.

Task overview: Overview of the Process for Creating Multiple Calibration Sessions [page 86]

Previous task: Uploading Multiple Calibration Sessions [page 87]

Next task:

5.5.3 Creating Multiple Calibration Sessions

Create multiple calibration sessions using the validated CSV file in one go.

Prerequisites

- The *Mass Create Calibration Session* permission is enabled.
- You have uploaded and validated the CSV file.

Procedure

1. Go to ▌▶ *Admin Center* ❯ *Calibration* ❯ *Mass Create Calibration Sessions* ▌.
2. Click *Create Sessions*.

   A system message displays, informing you that the Mass Create calibration sessions request has been submitted.
3. You receive an email notification when the mass creation job is done.

   The email notification contains detailed information about mass session creation results. The email also provides a list of session IDs. You can copy and paste these IDs to validate and activate sessions.

Results

You have successfully created multiple sessions.

Next Steps

You can go on to validate the sessions with the session IDs listed in the email notification.

Task overview:

Previous task:

Next task:

5.5.4 Validating Multiple Calibration Sessions

Validate multiple calibration sessions by session IDs in one go.

Prerequisites

- The *Mass Create Calibration Session* permission is enabled.
- You have one or more valid session IDs.

Procedure

1. Go to ▌▶ *Admin Center* ❯ *Calibration* ❯ *Mass Create Calibration Sessions* ❯.
2. Fill in the session IDs, separated by commas.

   The sessions must be in setup or deactivated statues.
3. Click *Validate Sessions*.

   A system message displays, informing you that the Validate Sessions request has been submitted.
4. You receive an email notification when the mass validation job is done.

   The email notification contains detailed information about mass session validation results. You can make necessary adjustment according to the email. For example, move the form of a subject to the Calibration step.

Results

You have successfully validated multiple sessions.

Next Steps

You can go on to activate these sessions.

Task overview: Overview of the Process for Creating Multiple Calibration Sessions [page 86]

Previous task: Creating Multiple Calibration Sessions [page 90]

Next task: Activating Multiple Calibration Sessions [page 92]

5.5.5 Activating Multiple Calibration Sessions

Activate multiple calibration sessions by session IDs in one go.

Prerequisites

- The *Mass Create Calibration Session* permission is enabled.
- You have one or more valid session IDs.

Procedure

1. Go to ▐▶ *Admin Center* ❭ *Calibration* ❭ *Mass Create Calibration Sessions* ❭.
2. Fill in the session IDs, separated by commas.

   The sessions must be in setup or deactivated statues.
3. Click *Activate Sessions*.

   A system message displays, informing you that the session activation request has been submitted.
4. You receive an email notification when the mass activation job is done.

   The email notification contains detailed information about mass session activation results.

Results

You have successfully activated multiple sessions.

Task overview: Overview of the Process for Creating Multiple Calibration Sessions [page 86]

Previous task: Validating Multiple Calibration Sessions [page 91]

Next: Validating File and Validating Sessions [page 93]

5.5.6 Validating File and Validating Sessions

There are two validating steps in mass create calibration sessions: validating the CSV file and validating the sessions. Here is the comparison between the two steps.

Validating File

- checks if the user IDs are valid
- checks if there are inconsistencies between the CSV file and the automatic import through *Select subjects and participants automatically according to the owners.*
- checks if there are employ columns for owners, session names, and template names
- checks if there is excel formula injected
- checks if there is typo in column names
- checks if the creation date is later than the session end date
- checks if the template is in *Enabled* status
- checks if these roles are empty: Facilitator, Owner, Subject

Validating Sessions

- checks if the Performance or Compensation form is in Calibration step
- checks if all the subjects have Performance or Compensation forms
- checks if there are inactive users
- checks if proper permissions are granted
- checks if subject is in the target population of the user of *Manage Calibration Session* permission
- checks if a subject is only in one calibration session
- checks if the EP rating is manually added

Parent topic: Overview of the Process for Creating Multiple Calibration Sessions [page 86]

Previous task: Activating Multiple Calibration Sessions [page 92]

5.6 Overview of the Process for Creating a Calibration Session in Team Overview

Managers can create calibration sessions directly in the *Team Overview* page of Performance Management.

SAP SuccessFactors supports the ability to invoke Manager Calibration from the *Team Overview* page. Managers can navigate back to the *Team Overview* page when they complete the calibration sessions. Managers can only calibrate their first level of direct reports with Team Overview sessions.

To enable this function for managers, you must:

1. Prepare a calibration template and link it to a Performance Management form
2. Enable the *Launch Calibration From PM v12 Team Overview* feature in *Admin Center*
3. Select the calibration template to be used in the sessions launched from *Team Overview*

Managers can create calibration sessions for performance reviews based on the Performance Management form. The calibration template is used when managers create sessions in the Team Overview page.

1. Linking a Calibration Template with a Performance Management Form [page 95]
   Prepare and link a calibration template to a Performance Management form, so that managers can use the calibration template in the Team Overview page.
2. Enabling Team Overview Session [page 95]
   Admins can enable the Team Overview session launch feature so that managers can create calibration sessions directly in the Team Overview page of Performance Management.
3. Selecting a Calibration Template for Team Overview [page 96]
   Choose a Calibration template to be used in the Team Overview page to launch calibration session.
4. Launching Sessions in Team Overview [page 97]
   Managers can create calibration sessions for their first level of direct reports in the Team Overview page of Performance Management.

Parent topic: Creating Calibration Sessions [page 70]

Related Information

Settings Before Creating Calibration Sessions [page 71]
Data Requirements for Creating Calibration Sessions [page 75]
Creating a Calibration Session in Admin Center [page 78]
Creating Manager-Initiated Calibration Session [page 83]
Overview of the Process for Creating Multiple Calibration Sessions [page 86]

5.6.1 Linking a Calibration Template with a Performance Management Form

Prepare and link a calibration template to a Performance Management form, so that managers can use the calibration template in the Team Overview page.

Procedure

1. Go to ❚▶ *Admin Center* ❭ *Calibration* ❭ *Manage Calibration Templates* ◀❚.
2. Select a calibration template to be used for the calibration sessions launched in Team Overview.
3. Go to the *Data* tab of the calibration template.
4. Choose a Performance Management template in the *Performance* section. Choose a routing step and at least one rating element.
5. Click *Save*.

Results

You've successfully linked a calibration template to a Performance Management form.

Task overview: Overview of the Process for Creating a Calibration Session in Team Overview [page 94]

Next task: Enabling Team Overview Session [page 95]

5.6.2 Enabling Team Overview Session

Admins can enable the Team Overview session launch feature so that managers can create calibration sessions directly in the Team Overview page of Performance Management.

Procedure

1. Go to ❚▶ *Admin Center* ❭ *Calibration* ❭ *Manage Calibration Settings* ◀❚.
2. Go to the *Global Settings* tab.
3. Select the *Launch Calibration From PM v12 Team Overview* option.
4. Click *Save*.

Results

You've successfully turned on the Team Overview session launch feature.

Task overview: Overview of the Process for Creating a Calibration Session in Team Overview [page 94]

Previous task: Linking a Calibration Template with a Performance Management Form [page 95]

Next task: Selecting a Calibration Template for Team Overview [page 96]

5.6.3 Selecting a Calibration Template for Team Overview

Choose a Calibration template to be used in the Team Overview page to launch calibration session.

Prerequisites

- You have prepared a Calibration template that is linked to a Performance Management form.
- You have turned on the *Launch Calibration From PM v12 Team Overview* option in *Manage Calibration Settings*.

Procedure

1. Go to ▌ *Admin Center* ❯ *Calibration* ❯ *Manage Calibration Settings* ❯ .
2. Go to the *Manager Template* tab.
3. Choose the Calibration template that you have linked to a Performance Management form previously.
4. Click *Save*.

Results

You have successfully selected a Calibration template for Team Overview session launch.

Task overview: Overview of the Process for Creating a Calibration Session in Team Overview [page 94]

Previous task: Enabling Team Overview Session [page 95]

Next task: Launching Sessions in Team Overview [page 97]

5.6.3.1 Manager Template

Manager Templates helps managers create sessions directly in Team Overview in Performance Management.

Manager Template is a touching point between Calibration and Team Overview in Performance Management. You can select a Calibration template from the dropdown list. With proper configuration, managers can see the *Calibration* button, and create calibration sessions directly on the *Team Overview* page. The Calibration template selected in *Manager Template* determines settings of the sessions that managers create in Team Overview.

5.6.4 Launching Sessions in Team Overview

Managers can create calibration sessions for their first level of direct reports in the Team Overview page of Performance Management.

Prerequisites

- You have prepared a Calibration template and linked it to a Performance Management form.
- You have enabled the Team Overview session launch feature in *Admin Center*.
- You have selected the Calibration template to be used in the sessions launched from Team Overview.

Procedure

1. Managers can go to ▶ *Home* ▶ *Performance* ▶.
2. Go to the *Team Overview* tab.

   Managers can see a *Calibration* button.
3. Click the *Calibration* button.

   A calibration session displays.

Results

Managers can calibrate their direct reports in the session. They can go back to the Team Overview page by clicking the *Back To Team Overview* link.

Task overview: Overview of the Process for Creating a Calibration Session in Team Overview [page 94]

Previous task: Selecting a Calibration Template for Team Overview [page 96]

6 Using Calibration Sessions

After calibration sessions are created and activated, HR and managers can start using the sessions.

For the sessions that are **in progress**, permitted session reviewers can take the following actions:

- Review and change ratings in different views.
- Add comments to subjects.
- Export and print sessions for discussion.
- Show source rating information.

Reviewing Calibration Sessions [page 98]
> For sessions that are in progress, HR and managers can review and edit subjects through different Calibration views.

Finalizing Calibration Sessions [page 103]
> Session reviewers can finalize sessions in bulk and send notification emails upon session finalization.

Deleting Calibration Sessions [page 104]
> Delete multiple calibration sessions in one go.

6.1 Reviewing Calibration Sessions

For sessions that are in progress, HR and managers can review and edit subjects through different Calibration views.

Calibration views provide users an at-a-glance overview of relevant performance management information. Users can take different actions in the views:

Calibration Views and Actions

Calibration Views	Description	Actions
Dashboard view	It provides a high-level overview of the calibration session.	• Print • Send email • Export
List view	It lists all the employees in the calibration session.	• Print • Send email
Bin view	It displays employees by ratings distribution.	• Export • Mark as discussed
Matrix view	It graphically displays employees on a matrix grid report, based on data selections made during calibration setup.	• Change ratings • Add comments

Parent topic: Using Calibration Sessions [page 98]

Related Information

6.1.1 Showing Source Rating Information of Subjects

Users can directly access the rating information of a subject from the action menu in calibration sessions. The information displayed is retrieved from the People Profile data at session activation.

Prerequisites

- You're using Fiori Calibration UI to view the *Source Rating Information* item.
- You must have the *Manage Calibration Sessions* permission.
- The data source you defined for your Calibration Session template is People Profile. If the data source of your Calibration Session template is not People Profile, the *Source Rating Information* option does not appear in the action menu.

Context

If the data source of your template is People Profile, the existing ratings between the start and end dates of the calibration template are read. These ratings can be from Performance, Calibration Sessions, People Profile, or 360 Reviews. The latest ratings are used for Calibration Sessions.

Procedure

1. Go to ▌ *Home Page* ❯ *Calibration* ❯ *Sessions* ❚. Choose a Calibration Session.
2. Choose a View.
3. Select *Source Rating Information* from the action dropdown next to the selected subject.

Results

You can see the Source Rating Information for the subject.

6.1.2 Comments in Calibration Sessions

The comment function enables permitted session reviewers to leave explanations on rating changes and share feedback with other reviewers in the sessions that are in progress.

Permissions

- For reviewers with the *Write* permission, you can add, edit, delete, and view comments.
- For reviewers without the permission, you can only view comments.

Features

When reviewers click the *Comment* link or the icon ⌨ beside a subject, you can open the comment dialog and use the following features:

Adding Comments

Reviewers can add comments to subjects in any views except the *Dashboard*. Each comment has a maximum limit of 4000 characters.

Editing Comments

For comments that were created **after** 1H 2020 release, only the comment creator can edit the content.

For the comments that were created **before** 1H 2020 release, any reviewers with the *Write* permission can edit them.

Deleting Comments

For comments that were created **after** 1H 2020 release, only the comment creator can delete them.

For the comments that were created before 1H 2020 release, reviewers with the *Write* permission can delete them.

Viewing Comments

Reviewers can see the comments on the following pages:

- Any views of calibration sessions except the Dashboard view
- Reports, including Report-Story and Ad Hoc report
- The *Subjects List* page in *Executive Review*
- The *Calibration History Block* in People Profile
- Printed and exported documents of calibration sessions, reports, the *Subjects List* page, and profile views.

For each comment, the commenter's name and the creation date are displayed by default. If you enable the *Authorized By* and *Reason Code* fields for enforced comment in the session template, the authorizer's name and the reason code are also displayed.

> i Note
>
> The commenters and authorizers cannot be anonymous.

Viewing Comments From Other Sessions

Admins can roll up comments from other sessions based on the same template by enabling *Roll up comments from the other sessions based on the same template* through ▌ *Admin Center* > *Manage Calibration Templates* > *Advanced* ⟩ for a calibration template. With the feature enabled, reviewers can see the following two tabs in the comment dialog that is opened from the session details page:

- The *From This Session* tab includes comments that are made for an employee in the current session. Permitted reviewers can add, edit, and delete comments in this tab.
- The *From Other Sessions* tab includes read-only comments that are made for an employee in the other sessions of the same template.

> **i Note**
>
> If a session is deleted or deactivated, the comments made in the session cannot be rolled up.

Limitation

For the comments that were created before 1H 2020 release, commenters' names, authorizers' names, and creation dates aren't displayed.

6.1.2.1 Adding Comments to Subjects

Add comments to the subjects in an in-progress session.

Prerequisites

- You're granted with the *Write* permission.
- The session is in the *In Progress* status.

Context

When reviewing an in-progress session, you can add comments to any subjects in any views except the Dashboard.

Procedure

1. Go to Calibration and select an in-progress session.

2. Choose a subject and click the three-dot menu.

3. Click *Comment*.

4. Enter comments.

5. Click *Save*.

Results

You've added a new comment to a subject. You can also edit and delete this comment.

6.1.3 Printing the Views in Calibration Sessions

The Print option in Calibration enables users to download a PDF version of the Calibration views.

You can print the gender indicators on the Calibration view. However, currently, the photos or the photo placeholders are not getting printed; instead, a legend icon for male or female gets printed.

6.1.4 Exporting Calibration Sessions

Export one or multiple calibration sessions at a time.

Prerequisites

You have the permission to view calibration sessions.

Procedure

1. Go to ▌ *Home* ❭ *Calibration* ❭ *Sessions* ▐ .

   A list of calibration sessions displays.

2. If you want to export all the sessions, you can directly click the *Export All* button. You can also select the sessions that you want to export and click the *Export* button.

   Please note that deactivated sessions cannot be downloaded.

3. A zip or Excel file is saved.

> **i Note**
>
> Calibration sessions are exported in .xls files. Due to the .xls workbook limitation, data beyond 256 (IV) columns cannot be saved. For example, if the bin view of a calibration session has over 256 columns of data, the session cannot be successfully exported.

Results

You have successfully downloaded the calibration sessions.

6.2 Finalizing Calibration Sessions

Session reviewers can finalize sessions in bulk and send notification emails upon session finalization.

Prerequisites

- You're one of the session reviewers, including facilitator, participant, owner, and executive reviewer.
- You're granted with *Finalize* permission.
- The sessions are in "In Progress" or "Approving" status.

Context

You can finalize sessions in bulk and send notification emails upon session finalization in the System. The default *Online Mass Finalization Threshold* of 25 can be changed through ▶ *Admin Center* ❯ *Manage Calibration Settings* ❯ *Global Settings* ❯ *Online Mass Finalization Threshold* ◢.

However, when the number of sessions you select to finalize exceeds the threshold, the finalization will be processed as an offline job. Once the processing is completed, you receive an e-mail with the result of the mass finalization. Additionally, if you would like to notify session participants of the finalized sessions, you need enable the *Notify Calibration Participants of Session Finalization* template first.

Procedure

1. Go to *Sessions* page in Calibration.
2. Select sessions to finalize.

3. Click the *Finalize* icon in the upper-right corner.

   When you're granted with the Finalize permission, the *Finalize* icon turns active. Otherwise, it's inactive.

4. Click *Continue* to review sessions that are ready to be finalized.

5. Click *Send All* to send notification emails of the finalized sessions.

   To send notification emails of the finalized sessions, you must go through the whole process. If you exit after the sessions are finalized, you can't send the emails for the finalized sessions afterwards.

Results

You've successfully finalized multiple sessions and sent notification emails of the finalized sessions.

Task overview:

Related Information

6.3   Deleting Calibration Sessions

Delete multiple calibration sessions in one go.

Prerequisites

- You are using the SAP Fiori UI.

- You have delete permission through ▶ *Admin Center* ❯ *Calibration* ❯ *Manage Calibration Settings* ❯ *Permissions* ❯.

  > ### i Note
  >
  > Only facilitators and co-facilitators can be granted the delete permission.

Procedure

1. Go to ▌ *Home* ❯ *Calibration* ❯ *Sessions* ❯.

   A list of calibration sessions displays.

2. Select one or more calibration sessions.

3. Click the delete icon above the session list.

   A *Delete Sessions* popup shows.

4. Click *Continue*.

   A toast message displays informing you that you have successfully deleted the sessions.

   > **i Note**
   >
   > If you do not have delete permission, a warning message shows informing you that sessions cannot be deleted due to permission limitation.

5. Close the popup window.

Results

You have successfully deleted the selected sessions. Those sessions are automatically removed from the session list.

Task overview: Using Calibration Sessions [page 98]

Related Information

Reviewing Calibration Sessions [page 98]
Finalizing Calibration Sessions [page 103]

7 Calibration Reports

7.1 Calibration Report-Table

Calibration

The Calibration Report-Table allows you to create a report on all aspects of a calibration session. This type of report includes information on the subjects, session, calibration roles, template name, and rating changes.

Calibration Activity

The Calibration Activity Report-Table allows you to create a report on all aspects of a calibration session, filtered only for subjects with rating changes or activity. Calibration Activity Report-Table does not support rating label localization. For example, a participant gives a new rating with Germany label to a subject, then an Admin runs a Calibration Activity report. The label of the new rating in the report is in Germany even though the login locale of the Admin is English.

7.2 Granting Permissions for Creating Report-Table

Grant permissions to admins or managers so that they can create Report-Table reports.

Procedure

1. Go to ▶ *Admin Center* ❭ *Set User Permissions* ❭ *Manage Permission Roles* ❭.
2. On *Permission Role List*, select your target permission role, for example, for administrators or managers.

   The *Permission Role Detail* page appears.
3. Under *2. Permission Settings*, click *Permission...*.
4. In the *Permission Settings* dialog box, go to ▶ *User Permissions* ❭ *Reports Permission* ❭.
5. Select *Create Report* and select the modules, so that the role can have the permission to create reports for the selected modules.
6. Select *Run Report* and select the modules, so that the role can have the permission to run reports for the selected modules.
7. Click *Done*.

8. On the *Permission Role Detail* page, scroll down to the *Grant this role to* section.

   You can further refine the permission group and target population through *Edit Granting*.

9. Click *Save Changes*.

Results

The Repot-Table is now accessible in your application.

7.3 Creating a Calibration Report-Table

Create a Calibration Report-Table on all aspects of a calibration session in Report Center.

Prerequisites

You must have the *Create Report* permission to create a Report-Table in Report Center.

Procedure

1. From the main navigation menu, go to ▶ *Reporting* ❯ *Report Center* ❯ .
2. Click *New* to create a new report.
3. Select *Report - Table* in the popup.
4. Select *Single Domain*.
5. Select *Calibration Activity*, *Calibration Org Chart Coverage*, or *Calibration*.
   - *Calibration Activity* is for all rating changes in calibration sessions.
   - *Calibration Org Chart Coverage* is for employee information. No ratings are included.
   - *Calibration* is for latest ratings in active calibration sessions .
6. Follow the configuration sequence in the table below:

Feature	Description
General Info	Fill in *Report Name*, *Description*, and *Report Priority*.
People	Choose a *Team Manager* and a *Team Reporting Type*. Select the *Include inactive users* if you want to add inactive users to the report.
Columns	Select columns that you want to show in the report.

Feature	Description
Configuration	Select data type through *Data Type Configuration*. For example, you can choose either Date or Timestamp (date and time). If you want to show both a label and its ID, you can configure through *Show Value ID configuration*.
Filters	You can filter the data in the columns based on the filter criteria that you define. Configure the filter either *By My Selection* or *By Rule*, select relevant options, and click *Done*.

> ⓘ Note
>
> Once data enter calibration sessions, the data become calibration sessions' data. Calibration sessions do not respect field level permissions. You can add filters to ensure that proper data are seen by target audience and not available to others.

Results

You have successfully created a Calibration Report-Table.

7.4 Calibration Session Rating Logic

Based on different data sources and their varied configurations, rules of which rating get pulled into calibration sessions are different.

Data Source: People Profile

If your data source of a calibration session is People Profile, and the Calibration Session is activated, the Calibration Session picks up ratings for subjects within the review period. The review period is predefined in the Calibration Session template.

1. If there are existing calibrated ratings with the same Session ID, ratings from the old session are pulled into the new Calibration Session directly. For example, you deactivate a session and then reactivate it. The session IDs are the same.
2. If the last step returns no findings, the Calibration Session searches all types of ratings within the review period in descending order of end date, start date, last modified date of ratings. If a rating is found, the Calibration Session picks up the rating.
3. If the last step returns no findings, the Calibration Session creates a rating named *Unrated*. The unrated rating does not appear in People Profile.

Data Source: Performance Management

If your data source of a calibration session is Performance Management, the ratings are pulled into the calibration session based on the following rules.

- The calibration session reads four ratings: performance, potential, competency, and objective. Calibration sessions read ratings primarily from Customized Weighted Rating section, Performance Potential Summary section, Objective Competency Summary section, and Summary Section from the Performance Management form.
- Calibration reads the ratings from the following sections in the order of priority from high to low: Customized Weighted Rating section, Performance Potential Summary section, Summary Section, Objective Competency Summary section.
- For Performance ratings, if the *Show in-progress form ratings in live profile* option in Provisioning is disabled, the in-progress Performance form ratings are not retrieved and used in the Calibration Session even if the ratings are the latest.

> → Remember
>
> As a customer, you don't have access to Provisioning. To complete tasks in Provisioning, contact your implementation partner or Account Executive. For any non-implementation tasks, contact Product Support.

- After the session is finalized, if there is rating change in the Performance Management form, the latest rating can be reflected in the calibration session. However, the ad-hoc report for the session **does not** reflect the latest rating. The ratings in ad-hoc report are set when a session is finalized.
- If manual ratings are configured in the Performance Management form, the calibration session prefers manual ratings over calculated ratings.

Related Information

Customized Weighted Rating section

7.4.1 Single Session Rating Change in Ad Hoc Report

If the data source of your calibration session is Performance Management, the rating in session reflects changes in the Performance Management form. However, the rating in the Calibration ad hoc report does not always keep up with the Performance Management form rating change. Calibration ad hoc report has a set of rules of its own. The table explains these rules with an example.

In the example, an employee attends a single calibration session. The data source of the session is Performance Management. The subject experiences several rating changes.

Workflow	Rating in Session	Old Rating in Ad Hoc Report	New Rating in Ad Hoc Report	Comment
The subject has an original rating of 1. The subject attends the session. The session is activated.	1	1	1	The rating 1 is from previous records. If the subject is new to the company and has no original rating, no rating value displays in session or in ad hoc report.
The rating of the subject is changed from 1 to 2 during the session. The session is saved.	2	1	2	The change from 1 to 2 is saved. The ad hoc report is notified of the change. If you run a ad hoc report now, the rating will be 2. The rating in Performance Management form is now 2.
The rating in the Performance Management form is changed by the manager from 2 to 3.	3	1	2	The rating in session will immediately pick up the rating change. The old rating in ad hoc report will always be the original rating. Because the rating is modified in the Performance Management form instead of the session, the ad hoc report is not notified of the change. So, the rating in ad hoc report is still 2.
The session is finalized. But it has not been routed to the next step.	3	1	3	The finalization triggers an update in the ad hoc report. The rating in ad hoc report is changed from 2 to 3 this time.
The Performance Management form is routed to the next step. The rating is changed from 3 to 4 in the Performance Management form.	4	1	3	Rating in session is responsive of rating changes in the Performance Management form. But the session has been finalized, no change in rating can be triggered in ad hoc report by now. So, the rating in ad hoc report stays at 3.

For Performance Management data source, Calibration ad hoc report picks up snapshots of ratings at session activation, ratings changed and saved in activated session, and ratings at session finalization, while the rating in session always reflects the latest rating.

7.4.2 Multiple Session Rating Changes in Ad Hoc Report

If an employee attends more than one calibration sessions and the data source of these sessions is Performance Management, the ratings in multiple sessions reflect changes in the Performance Management form. However, the ratings in the Calibration ad hoc reports do not always keep up with the Performance Management form rating

changes. Calibration ad hoc report has a set of rules of its own. The table below explains these rules with an example.

In the example, an employee attends two calibration sessions: session A and session B. The data source of both sessions is Performance Management. The subject experiences several rating changes. Through out all the rating changes, old ratings in ad hoc reports always reflect ratings when the sessions were activated for the first time. In this example, the old ratings in ad hoc reports stay at 1.

Workflow	Rating in Session A	Old Rating in Ad Hoc Report of Session A	New Rating in Ad Hoc Report of Session A	Rating in Session B	Old Rating in Ad Hoc Report of Session B	New Rating in Ad Hoc Report of Session B	Comment
The subject has an original rating of 1. The subject attends two sessions: Session A and B. The sessions are activated.	1	1	1	1	1	1	The rating 1 is from previous records. If the subject is new to the company and has no original rating, no rating value displays in sessions or in ad hoc reports.
The rating of the subject is changed from 1 to 2 in session A. Session A is saved.	2	1	2	2	1	1	The change from 1 to 2 is saved for session A. The ad hoc report of session A is notified of the change. If you run a ad hoc report for session A now, the rating will be 2. The rating in Performance Management form is now 2. So the rating in session B reads the new rating 2. However, this change is not triggered in session B. The rating for session B ad

Workflow	Rating in Session A	Old Rating in Ad Hoc Report of Session A	New Rating in Ad Hoc Report of Session A	Rating in Session B	Old Rating in Ad Hoc Report of Session B	New Rating in Ad Hoc Report of Session B	Comment
							hoc report stays at 1.
Session B is deactivated and then reactivated.	2	1	2	2	1	1	When session B was activated for the first time, the rating is 1. Even though the session is deactivated and reactivated, the rating in ad hoc report will always be the rating when the session was activated for the first time.
The rating of the subject is changed from 2 to 3 in session B. Session B is saved.	3	1	2	3	1	3	The Performance Management form picks up the latest rating as 3. The rating change happens in session B, so the ad hoc report of session A is not affected. However, the rating in session A reads the latest rating in Performance Management form, that is 3.
Session A is finalized.	3	1	3	3	1	3	When the finalization of session A is triggered, the ad hoc report is notified of the latest

Workflow	Rating in Session A	Old Rating in Ad Hoc Report of Session A	New Rating in Ad Hoc Report of Session A	Rating in Session B	Old Rating in Ad Hoc Report of Session B	New Rating in Ad Hoc Report of Session B	Comment
							rating change. So the rating in ad hoc report of session A is now 3.

For Performance Management data source, Calibration ad hoc report picks up snapshots of ratings at session activation, ratings changed and saved in activated session, and ratings at session finalization, while the rating in session always reflects the latest rating.

8 Data Protection and Privacy

8.1 Centralized Data Protection and Privacy

Data protection and privacy features work best when implemented suite-wide, and not product-by-product. For this reason, they're documented centrally.

The *Implementing and Managing Data Protection and Privacy* guide provides instructions for setting up and using data protection and privacy features throughout the SAP SuccessFactors HXM Suite . Please refer to the central guide for details.

> **i 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.

Related Information

Implementing and Managing Data Protection and Privacy

8.2 Data Retention Management

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**
>
> We encourage all customers to stop using the legacy purge function and start using data retention time management (DRTM) instead. To get started using this and other data protection and privacy features, refer to the Data Protection and Privacy guide.

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.

> ℹ Note
>
> If you are using the legacy data purge function, you can only purge a calibration session when there is at least one facilitator assigned to the session.

> ❗ Restriction
>
> Be aware that the legacy data purge function may not meet your data protection and privacy requirements. It doesn't cover the entire HXM Suite and it doesn't permit you to configure retention times for different countries or legal entities.

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.

9   Qualtrics Email Feedback for Calibration Session Completion

Configure Calibration and Intelligent Services to send employee information to Qualtrics, so that you can send Qualtrics feedback opportunities to employees when you finalize a Calibration session.

Qualtrics feedback opportunities allow you to better understand your employees, with questions such as "How would you rate the Calibration session?"

Creating this integration requires:

- Calibration
- A Qualtrics account that includes a Employee Experience license for Lifecycle projects
- Enabling Intelligent Services
- Enabling Integration Center

You use your Qualtrics account to create surveys and view their results. All the settings to configure the contents and schedule for the email survey are performed at Qualtrics.

To add Qualtrics feedback opportunities, enable and integrate Qualtrics with your SAP SuccessFactors system. Refer to *Integrating SAP SuccessFactors with Qualtrics* for details.

Related Information

[Integrating SAP SucccessFactors with Qualtrics](#)

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