SAP SuccessFactors

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Implementing and Managing 360 Reviews

THE BEST RUN

Content

Change History

Learn about changes to the documentation for 360 Reviews in recent releases.

1H 2023

Type of Change	Description	More Info
Changed	We updated this information to align it with other topics reused in the home page guide.	360 Reviews on the Latest Home Page [page 8]

2H 2022

Type of Change	Description	More Info
Changed	We included information about a new purge request introduced in this release - *DRTM 360 Reviews - External User Purge*.	External Raters [page 100]
Changed	We included information about the `competency-filter` attribute.	Rater Category Rollup [page 78]
Changed	We included information about how forms are routed.	Route Maps [page 103]
Changed	We updated this information to explain how the *Disable Page Setup* option is used.	360 Form Template Settings [page 53]
Changed	We updated this information to explain how the *Hide Route Map on the Form* option is used.	360 Form Template Settings [page 53]
Added	We reused a standardized piece of information for 360 Reviews from the home page guide.	360 Reviews on the Latest Home Page [page 8]

1 Overview of SAP SuccessFactors 360 Reviews

SAP SuccessFactors 360 Reviews enables you to combine self-feedback with anonymous input from colleagues and external sources to have the most comprehensive view of the performance of employees in your organization.

If your review process relies only the feedback of managers, you risk missing out on valuable information. Bringing in feedback from everyone connected to your employees - including clients - gives a much more balanced, comprehensive, and informative picture of your employees.

With 360 Reviews, you have an independent development tool that isn't directly tied to compensation or promotion decisions and is geared toward personal development. You can offer your managers and employees clear insights into their strengths and weakness. The 360 Reviews offer a full-circle view of performance that provides a better insight for coaching and development, and ensures more accurate, effective, and fair assessments.

The 360 Reviews help you:

- **Develop comprehensive feedback**: Incorporate self-ratings, peer review, and upward assessments for feedback at all levels.
- **Gain a holistic performance perspective**: Get feedback from outside employees' hierarchies or departments and gain a broader view.
- **Automate workflows**: Stay ahead of deadlines with integrated e-mail reminders and requests, plus automatic routing of forms among managers, employees, and peers.
- **Identify hidden strengths and weakness**: Pinpoint skills, competency gaps, reward drivers, and other performance trends.
- **Use limited compensation budgets effectively**: Make pay decisions with valid, objective, and anonymous feedback to gain a candid perspective.

> → Remember
>
> The route map used in a 360 Reviews must not have a Collaborative step (C-step), as the 360 workflow does not support the C-step. In the 360 reviews, the process owner is an important role responsible for the last modify step and this "Process Owner" role can only be one user per design. If a C-step is added in the modify stage, multiple users become process owners, and that breaks the rules defined for the 360 process.

The features listed under 360 Reviews in Admin Center

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

Use this feature:	To do this:
Change 360 Process Owner	Change the process owner of a 360 document.
Change Participant Category	Change the participant categories for a 360 document.

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

1.1 360 Reviews on the Latest Home Page

360 Reviews is part of SAP SuccessFactors Performance & Goals. Learn about 360 Reviews features on the latest home page.

Name	Description	Where Shown	When Shown	Prerequisites	On Mobile?
Complete 360 Evaluation (for others)	Prompts you to complete 360 Reviews forms for others. For managers, if they have more than one task, task cards are grouped into Direct Reports, Matrix Reports, and Other in the stack view. (To-Do Category 2)	*For You Today*	Appears when you're added as a rater on a 360 Reviews form for another person and the form is now in your inbox (it can be in the Modify, Evaluation, or Signature stage). Disappears in any of the following cases: • You complete your task and the form is no longer in your inbox. • 365 days after the due date, if no action is taken and a due date is set on the form. • 365 days after the Last Modified date, if no action is taken and **no** due date is set on the form.	It's enabled at *Manage Home Page* > *Card Settings*.	Yes

Name	Description	Where Shown	When Shown	Prerequisites	On Mobile?
Complete Your 360 Evaluation (self-review)	Prompts you to complete 360 Reviews forms for yourself. Multiple self-review cards are gathered in their own stack; they're not stacked together with *Complete 360 Evaluation* cards. (To-Do Category 2)	*For You Today*	Appears only when the logged-in user is the subject of a 360 Reviews form that is in the Modify, Evaluation, or Signature stage (and the form can be found in the user's inbox). Disappears in any of the following cases: • You complete your task and the form is no longer in your inbox. • 365 days after the due date, if no action is taken and a due date is set on the form. • 365 days after the Last Modified date, if no action is taken and **no** due date is set on the form.	It's enabled at *Manage Home Page* > *Card Settings*.	

Use the Task Cards

You can view the following information on the 360 Reviews cards:

- Current step on the entire workflow
- Subject name of the form (not available for self-review cards)
- Due date: the date before which you're supposed to complete the task

And you can do the following things:

- Choose *Go to Form* to open the corresponding 360 Reviews form.
- Choose *View All* to view multiple cards when they're stacked.

- Choose *Remind Me Tomorrow* from the overflow button to dismiss the card temporarily.

1.2 360 Reviews - SAP Fiori Version

360 Reviews - SAP Fiori Version is Generally Available (GA).

While the majority of features are supported, it does not yet support all features from the 360 Reviews v11 Version. To see a list of remaining feature gaps, please go to Feature Comparison Between 360 Reviews - SAP Fiori Version and 360 Reviews v11 Version [page 11].

360 Reviews - SAP Fiori Version is supported by SAPUI5 technology, offering you an intuitive and modern user experience. The application gives you a 360-degree view of employee's performance that provides a better insight for coaching and development, and ensures accurate, effective, and fair evaluations. By upgrading to 360 Reviews - SAP Fiori Version, you can take advantage of the intuitive SAP Fiori UI design to boost employee engagement and accelerate talent development across your organization.

How to Upgrade to 360 Reviews - SAP Fiori Version

Before upgrading to 360 Reviews - SAP Fiori Version, make sure that you have 360 Reviews enabled in your system. Then go to *Admin Center* > *Upgrade Center* > *Recommended Upgrades*.

After upgrade, if you want to use the existing templates, you must update them in *Manage Templates* so that they can be compatible with 360 Reviews - SAP Fiori Version. The completed or in-process forms that were created before the upgrade aren't affected.

> **Note**
>
> If you haven't used any OData API-related features since upgrade, and now encounter some problems when opening the 360 Reviews - SAP Fiori Version form, you're recommended to refresh OData API Metadata via *Admin Center* > *Odata API Metadata Refresh And Export*.

How to Revert to the Old 360 Reviews Solution

You're allowed to revert to the old solution by either turning off 360 Reviews - SAP Fiori Version in *Upgrade Center* within 30 days after upgrade, or contacting your implementation partner or Product Support.

Please note the following before you undo the upgrade:

- After reverting back to the old solution, you can continue using the forms created using 360 Reviews - SAP Fiori Version, but these forms won't be changed back to the old UI. In addition, the new templates created in 360 Reviews - SAP Fiori Version are locked by the system and can't be used anymore.
- The forms and templates that are created before the upgrade can still be used.

Feature Comparison Between 360 Reviews - SAP Fiori Version and 360 Reviews v11 Version [page 11]

This topic mainly compares the feature gap between 360 Reviews - SAP Fiori Version and 360 Reviews v11 Version.

1.2.1 Feature Comparison Between 360 Reviews - SAP Fiori Version and 360 Reviews v11 Version

This topic mainly compares the feature gap between 360 Reviews - SAP Fiori Version and 360 Reviews v11 Version.

In 360 Reviews - SAP Fiori Version, some of the form template settings and form template elements aren't supported. Thus, when you validate and update the existing 360 Reviews templates for compatibility with 360 Reviews - SAP Fiori Version, you might get a validation message that says certain elements will be removed from the template.

Feature Comparison Between 360 Reviews - SAP Fiori Version and 360 Reviews v11 Version

Features	360 Reviews - SAP Fiori Version	360 Reviews v11 Version
	Form	
Sections that can be configured on a form: • Introduction section • Job Description section • Review Info section • Reviewer Info section • User Info section • Summary section • Signature section • Participant List section • Competencies section • Goals section • Custom section	Available	Available
Development goal section	Available	Available
Learning activity in development goal section	Only LMS learning supported	Available
Section description	Available	Available
Permissions For details, refer to Permissions [page 65].	Available	Available

Features	360 Reviews - SAP Fiori Version	360 Reviews v11 Version
Stack Ranker For details, refer to Stack Ranker [page 74].	Available	Available
Print	Available	Available
EZ Rater For details, refer to EZ Rater [page 72].	Available	Available
The form info icon	Available	Available
Add Approver	Available	Available
Add external user as participant For details, refer to Adding External Raters [page 101].	Available	Available
Advanced Search	Available	Available
Detailed 360 Report	Available	Available
Summary View	Available	Available
Autosave	Available	Unavailable
Objective and competency weight for each item and section	Available	Available
Rating scale description	Available	Available
Circle or star rating	Available	Unavailable
Required fields	Available	Available
Show Assignment	Available	Available
Competency behavior	Available	Available
Add to Outlook	Unavailable	Available
Performance form history	Available	Available
360 form history	Available	Available
Spellcheck	Available	Available
Legal Scan	Available	Available
Writing Assistant on the Competency section	Available	Available
Rich Text Editor (RTE) for comments and custom element	Available	Available
Plain text for comments and custom element	Unavailable	Available
Drill down function	Available	Available
Send Reminder	Available	Available
	Workflow	

Features	360 Reviews - SAP Fiori Version	360 Reviews v11 Version
Main routing actions: • Launch • Send to Next Step • Complete • Decline • Reject • Send back • Sign • Send Copy Recall completed forms	Available	Available
	Admin Tools	
Modify Form Route Map For details, refer to Modifying a Route Map [page 109].	Available	Available
Delete Form	Available	Available
Restore Deleted Forms	Available	Available
Route Signature Stage Form	Available	Available
Route Completed Forms	Available	Available
Manage Document Visibility	Available	Available
Change Form Date	Available	Available
Objective Number Prefix	Unavailable	Available
Edit competency comments on the Signature Stage	Unavailable	Available
Email Notification	Available	Available
	Report and Review	
360 Executive Review	Available	Available
Ad-hoc Report	Available	Available
Report - Story	Available	Available
	Template	
Min and max participants for category, form. and person	Available	Available
Hide the Export button on the completed forms	Unavailable	Available

Parent topic: 360 Reviews - SAP Fiori Version [page 10]

Related Information

Features Only Available in 360 Reviews - SAP Fiori Version [page 14]
Changes in Form Template of 360 Reviews - SAP Fiori Version [page 15]

1.2.2 Features Only Available in 360 Reviews - SAP Fiori Version

The table lists the features that are available exclusively to 360 Reviews - SAP Fiori Version.

Features Only Available to 360 Reviews - SAP Fiori Version

Features	Description
Form autosave	When you're editing a 360 Reviews form in 360 Reviews - SAP Fiori Version, the system saves the form automatically after 30 seconds of inactivity. For details, see Autosave in 360 Reviews - SAP Fiori Version [page 86].
Functions in detailed 360 report	When you open a detailed 360 report of SAP Fiori version, you can find the following functions that exist only in 360 Reviews - SAP Fiori Version: • Radar chart for competencies • The *Print Setup* dialog For details, see Detailed 360 Report [page 130].
Page breaks for PDF file of forms	The attribute pdf-page-break-opt is supported on 360 Reviews forms of Fiori version. Admins can add the attribute to form template XML file by using the following values: • 0 (default): The PDF version may have page breaks. • 1: The PDF version will avoid page breaks at the section level. • 2: The PDF version will avoid page breaks at both the section level and item level.

Parent topic: 360 Reviews - SAP Fiori Version [page 10]

Related Information

Feature Comparison Between 360 Reviews - SAP Fiori Version and 360 Reviews v11 Version [page 11]
Changes in Form Template of 360 Reviews - SAP Fiori Version [page 15]

1.2.3 Changes in Form Template of 360 Reviews - SAP Fiori Version

After you upgrade to 360 Reviews - SAP Fiori Version, a list of form template settings and template attributes are removed.

Removed Form Template Settings

The following settings are removed from the *Form Template Settings* tool.

- Enable Progress Meter
- Enable Calibration Mode
- Enable Rich Text Editing of Comment Fields
- Enable Auto Logout at Session Timeout
- Bypass Draft Routing
- Disable Detailed 360 Report button in routing bar
- Show on-form workflow options as a pull-down list
- Display Step Start Date
- Enable form title editability in Form info page
- Enable form title editability in the Form (V10)
- Hide manager's own documents in Manager Dashboard
- Hide the Export and Export(Compact) buttons for documents in the Completed Folder

Attributes Removed from Templates During Template Conversion

When you validate and update the existing 360 Reviews templates for compatibility with 360 Reviews - SAP Fiori Version, you might get a validation message that the following attributes will be removed from the template:

- Calibration-mode

  > **i Note**
  >
  > Calibration Mode is removed after upgrade. If you want to provide or review the different ratings for employees, you can use **Stack Ranker**.

- section-color
- sect-level-elements
- allow-to-add-development-goal
- Rater Section: project-template-id
- rating-bar-color
- show-points
- section-comments-blank-indicator

- comments-blank-indicator
- publish (a field publishing configuration that controls publishing in a given route step.)
- editable-in-signature-step
- show-group-matrix
- show-gap-competencies-in-summary
- show-gap-behaviors-in-summary
- allow-close-individual-gap-in-summary
- show-behaviors-in-summary
- show-cdp-wizard-button

Parent topic: 360 Reviews - SAP Fiori Version [page 10]

Related Information

Feature Comparison Between 360 Reviews - SAP Fiori Version and 360 Reviews v11 Version [page 11]
Features Only Available in 360 Reviews - SAP Fiori Version [page 14]

2 360 Reviews Configuration

2.1 Configuring 360 Templates Using XML

This chapter provides information on how to configure 360 templates using XML.

> → 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.

General Settings [page 18]
You can use a few attributes to define general behaviors of 360 Reviews forms.

Introduction Section [page 19]
This element is used to display introductory information. The introduction-sect element supports html.

User Info Section [page 23]
The User Information section displays the basic data of the subject being reviewed in the form. You can configure the 360 User Information section in the same way as a Performance Management form.

Review Info Section [page 25]
You can use this section to display the review period covered by the form and the name of the person who created the form.

Reviewer Section [page 26]
You can use this section to display the detailed information about reviewers.

Rater List Section [page 28]
You can manage raters for a 360 form in the Rater List section, and define those who will be automatically pulled into the 360 review process.

Competency Section [page 29]
You can use this section to specify the competencies that are evaluated in a form.

Goal Section [page 38]
You can use this section to define all the objectives or goals that will be evaluated during a review event.

Summary Section [page 41]
The Summary section displays summarized information about all the evaluation sections on the form in one central area.

Custom Section [page 45]
You can use custom sections to gather information that is not objective or competency based.

Post Review Phase [page 47]
The Post Review Phase can be used after the Evaluation Phase but before the Completion or Signature Phases.

Configuring Rating Scale Type [page 49]
You can associate different rating scale types with goal sections and competency sections.

2.1.1 General Settings

You can use a few attributes to define general behaviors of 360 Reviews forms.

Attributes

Attributes	Valid values	Description
no-calc	`true` or `false`	Set to `true` if you don't want to display calculated overall form ratings.
anonym	`true` or `false`	Set to `true` if you don't want to display user names on *Evaluation Summary* or the *Detailed Report* page. This makes forms truly anonymous. When `anonym` is set to `false`, you can configure forms as partially anonymous by defining roles, rater categories, and stages in the `fm-meta` element of the XML template. See Example: Making a 360 Anonymous for Some and Named for Others for more details.
spellchk	`true` or `false`	Set to `true` to allow spell-checking. The default value is `false`.
overall-rating	`true` or `false`	Set to `true` to disallow document completion or routing to the Signature stage if the overall rating is not valid.
recall-enabled	`true` or `false`	Set to `true` to allow participants to recall completed individual forms. Note that the *Recall* button only shows up when a form is in the Evaluation stage.
weight-lockdown	`true` or `false`	Set to `true` to prevent users from modifying section weights if applicable.
show-weight	`true` or `false`	Set to `true` to display section weights if applicable.
unmet-threshold-action	`drop` or `rollup`	This determines whether not meeting the threshold results in a drop or rollup of categories.
rating-rollup-type	`circular` or `uturn`	This determines whether to use a circular or u-turn rollup if the `unmet-threshold-action` is `rollup`.
embed-cdp-goals	`true` or `false`	This determines whether to disable Development Plan integration.
embed-learning	`true` or `false`	This determines whether to disable Learning integration.

Parent topic: Configuring 360 Templates Using XML [page 17]

Related Information

Introduction Section [page 19]
User Info Section [page 23]
Review Info Section [page 25]
Reviewer Section [page 26]
Rater List Section [page 28]
Competency Section [page 29]

Goal Section [page 38]
Summary Section [page 41]
Custom Section [page 45]
Post Review Phase [page 47]
Configuring Rating Scale Type [page 49]
Example: Making a 360 Anonymous for Some and Named for Others [page 70]

2.1.2 Introduction Section

This element is used to display introductory information. The introduction-sect element supports html.

Supported HTML tags

HTML tags	Description	Example
<p>	Defines a paragraph	Paragraph
<a>	Defines a hyperlink	hyperlink
	Defines important text	bold text
	Defines emphasized text	emphasis
<u>	Defines underlined text	<u>underlined text</u>
	Defines an ordered list	This is an example of a numbered list
	Defines an unordered list	This is an example of a bulleted list
	Defines a list	This is an example of a list
	Defines font, color, and size for text	colored text larger text
<img>	Defines an image	
	Defines a section in a document	Section of a document

HTML tags	Description	Example
<blockquote>	Defines a section that is quoted from another source	<blockquote cite="http://www.successfactors.com"> </blockquote>

> **Note**
>
> <span> and <img> are the only HTML tags that supports the "style" attribute

> **Example**
>
> **XML Example:**
>
> This is an example of an introduction section. The fm-sect-config sub-element is required but in this case does not affect the configuration.

```
<introduction-sect>
<fm-sect
index="0"
mgt-only="false"
split-cmt="false"
cmt-opt="1">
 <fm-sect-name><![CDATA[Introduction]]></fm-sect-name>
  <fm-sect-intro><![CDATA[]]></fm-sect-intro>
  <fm-sect-config>
    <rating-label><![CDATA[Rating]]></rating-label>
    <rating-label-others><![CDATA[Rating]]></rating-label-others>
    <default-rating><![CDATA[unrated]]></default-rating>
    <hidden-strength-threshold>0.0</hidden-strength-threshold>
    <blind-spot-threshold>0.0</blind-spot-threshold>
    <num-decimal-places>2</num-decimal-places>
    <publish-button-label><![CDATA[Publish Content]]></publish-button-label>
  </fm-sect-config>
</fm-sect>
</introduction-sect>
```

Attributes

Attributes	Valid values	Description
index	Numeric	The order in which sections are displayed in the form is controlled by section index number starting with index="0". As a result, the form XML can list sections in any order. When you move sections using Provisioning the index number assigned to a section will be updated automatically to reflect how you have rearranged the sections in the form. **→ 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.

Attributes	Valid values	Description
mgt-only	True or False	True if only Manager or HR can see this section
split-cmt	True or False	True if displaying Subject and Manager's comments side by side
cmt-opt	Numeric	Show both item and section comments

Elements

Elements	Description	Can be configured from Manage Template Settings in Admin Center
<introduction-sect>	360 Reviews introduction section	
<fm-sect>	Generic section for all SFV4 forms.	
<fm-sect-name>	The name of the section.	Yes
<fm-sect-intro>	Introductory text that can be used to provide the user with the information needed to complete the section. This can also be instruction text that describes the business processes, corporate values and goals, or that references other documents.	Yes

Elements	Description	Can be configured from Manage Template Settings in Admin Center
<fm-sect-config>	This element contains configurable options for any form sections. • **rating-label**: Label that corresponds to the Rating of Record field • **rating-label-others**: Label that corresponds to the Subject Rating or the Personal Rating, ratings other than the Rating of Record • **default-rating**: The default rating value when no value is selected • **unrated-rating**: The rating value that can be selected by the user. This value is not included in the calculation. • **hidden-strength-threshold**: The minimum value of the difference between employee's self rating and others' rating. If an employee rates lower than others on a goal or competency, and the difference is higher than the value you set here, the goal or competency is considered a hidden strength. • **blind-spot-threshold**: The minimum value of the difference between employee's self rating and others' rating. If an employee rates higher than others on a goal or competency, and the difference is higher than the value you set here, the goal or competency is considered a blind spot. • **num-decimal-places**: Number of decimals places to use when calculating the rating for this section	

Parent topic: Configuring 360 Templates Using XML [page 17]

Related Information

General Settings [page 18]
User Info Section [page 23]

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Reviewer Section [page 26]
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2.1.3 User Info Section

The User Information section displays the basic data of the subject being reviewed in the form. You can configure the 360 User Information section in the same way as a Performance Management form.

You can rename the section, and include or exclude various fields to display information about the employee. Data in this section is non-editable and read-only.

By default, each data element reflects the user information that is current at the time the form is opened. The `sync-until-completion` is used to sync an employee info element with values in the database in Employee section until document completion. To preserve the information it used to be at the time the form was created, even if the user's information changes after that, you can set the `sync-until-completion ="false"`.

You can use `fm-element` to define what information fields will be displayed about the subject being reviewed in the form. The accepted employee information fields include:

- USERNAME
- FIRSTNAME
- LASTNAME
- MI
- GENDER
- EMAIL
- MANAGER
- HR
- DEPARTMENT
- JOBCODE
- DIVISION
- LOCATION
- TIMEZONE
- HIREDATE
- EMPID
- TITLE
- FAX
- ADDR1
- ADDR2

- STATE
- ZIP
- COUNTRY
- LAST_REVIEW_DATE
- CUSTOM01
- CUSTOM02
- CUSTOM03
- MATRIX_MANAGER

XML Example

```
<userinfo-sect>
<fm-sect
index="1"
mgt-only="false"
split-cmt="false"
cmt-opt="1">
 <fm-sect-name><![CDATA[User Information]]></fm-sect-name>
  <fm-sect-intro><![CDATA[]]></fm-sect-intro>
  <fm-sect-config>
    <rating-label><![CDATA[Rating]]></rating-label>
    <rating-label-others><![CDATA[Rating]]></rating-label-others>
    <default-rating><![CDATA[unrated]]></default-rating>
    <hidden-strength-threshold>0.0</hidden-strength-threshold>
    <blind-spot-threshold>0.0</blind-spot-threshold>
    <num-decimal-places>2</num-decimal-places>
    <publish-button-label><![CDATA[Publish Content]]></publish-button-label>
  </fm-sect-config>
  <fm-element index="0" type="3">
    <ekey><![CDATA[FIRSTNAME]]></ekey>
    <ename><![CDATA[]]></ename>
    <evalue><![CDATA[]]></evalue>
  </fm-element>
  <fm-element index="1" type="3">
    <ekey><![CDATA[LASTNAME]]></ekey>
    <ename><![CDATA[]]></ename>
    <evalue><![CDATA[]]></evalue>
  </fm-element>
  <fm-element index="2" type="3">
    <ekey><![CDATA[TITLE]]></ekey>
    <ename><![CDATA[]]></ename>
    <evalue><![CDATA[]]></evalue>
  </fm-element>
   </fm-sect>
</userinfo-sect>
```

→ Remember

This code snippet is a sample configuration. The exact configuration depends on your system settings.

Parent topic: Configuring 360 Templates Using XML [page 17]

Related Information

General Settings [page 18]
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2.1.4 Review Info Section

You can use this section to display the review period covered by the form and the name of the person who created the form.

The Review Info section is sometimes labeled Review Information or Review Period. The originator field cannot be changed, and no additional fields can be added to this section. The default validation for review dates will include start date, end date and due date, but the validation of due date with the option “Disable Due Date Validation” can be disabled in *Form Template Setting*. XML customization of this section is limited to changing the section name, section name color bar, and section intro text.

> → 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.

XML Example

```
<reviewinfo-sectindex="2">
  <reviewinfo-sect-name><![CDATA[Review Information]]></reviewinfo-sect-name>
  <reviewinfo-sect-intro><![CDATA[<b>This review covers the dates listed below.</
b>]]></reviewinfo-sect-intro>
 <fm-sect-config>
        <rating-label><![CDATA[Rating]]></rating-label>
        <rating-label-others><![CDATA[Rating]]></rating-label-others>
        <default-rating><![CDATA[unrated]]></default-rating>
        <hidden-strength-threshold>0.0</hidden-strength-threshold>
        <blind-spot-threshold>0.0</blind-spot-threshold>
 </fm-sect-config>
</reviewinfo-sect>
```

→ Remember

This code snippet is a sample configuration. The exact configuration depends on your system settings.

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Related Information

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2.1.5 Reviewer Section

You can use this section to display the detailed information about reviewers.

You can rename the section, and include or exclude various fields to display information about the employee. Data in this section is non-editable and read-only. This section appears in the Evaluation stage of a form, or in the print view of a "named" form.

→ Remember

This code snippet is a sample configuration. The exact configuration depends on your system settings.

You can use `fm-element` to define what information fields will be displayed about the subject being reviewed in the form. The accepted employee information fields of Reviewer section are the same as those of User Info section, which include:

- USERNAME
- FIRSTNAME
- LASTNAME
- MI
- GENDER
- EMAIL
- MANAGER

- HR
- DEPARTMENT
- JOBCODE
- DIVISION
- LOCATION
- TIMEZONE
- HIREDATE
- EMPID
- TITLE
- FAX
- ADDR1
- ADDR2
- STATE
- ZIP
- COUNTRY
- LAST_REVIEW_DATE
- CUSTOM01
- CUSTOM02
- CUSTOM03
- MATRIX_MANAGER

XML Example


```
<reviewer-sect>
<fm-sect
index="3"
mgt-only="false"
split-cmt="false"
cmt-opt="1">
 <fm-sect-name><![CDATA[Reviewer Info]]></fm-sect-name>
  <fm-sect-intro><![CDATA[]]></fm-sect-intro>
  <fm-sect-config>
    <rating-label><![CDATA[Rating]]></rating-label>
    <rating-label-others><![CDATA[Rating]]></rating-label-others>
    <default-rating><![CDATA[unrated]]></default-rating>
    <hidden-strength-threshold>0.0</hidden-strength-threshold>
    <blind-spot-threshold>0.0</blind-spot-threshold>
    <num-decimal-places>2</num-decimal-places>
    <publish-button-label><![CDATA[Publish Content]]></publish-button-label>
  </fm-sect-config>
  <fm-element index="0" type="3">
    <ekey><![CDATA[FIRSTNAME]]></ekey>
    <ename><![CDATA[]]></ename>
    <evalue><![CDATA[]]></evalue>
  </fm-element>
  <fm-element index="1" type="3">
    <ekey><![CDATA[LASTNAME]]></ekey>
    <ename><![CDATA[]]></ename>
    <evalue><![CDATA[]]></evalue>
  </fm-element>
  <fm-element index="2" type="3">
    <ekey><![CDATA[TITLE]]></ekey>
```

```
    <ename><![CDATA[]]></ename>
    <evalue><![CDATA[]]></evalue>
  </fm-element>
   </fm-sect>
</reviewer-sect>
```

→ Remember

This code snippet is a sample configuration. The exact configuration depends on your system settings.

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2.1.6 Rater List Section

You can manage raters for a 360 form in the Rater List section, and define those who will be automatically pulled into the 360 review process.

The Rater List section lists raters for a 360 form, and is available only in the Modify stage. It can be made available to managers only by configuring `mgt-only="true"`.

By default, data of department, division, location, email, and manager has already been configured in the Rater List section. You can also control which data is displayed in this section by adding the corresponding code as follows, between `<date-column-format>` and `<min-rater-count>`. For example, if you add `<rater-column key="DIVISION"></rater-column>`, then only information about Division displays.

```
<rater-column key="DIVISION"></rater-column>
<rater-column key="LOCATION"></rater-column>
<rater-column key="DEPARTMENT"></rater-column>
<rater-column key="MANAGER"></rater-column>
<rater-column key="EMAIL"></rater-column>
```

The `default-rater` defines the roles that will be auto-populated in the rater list upon document creation.

XML Example

```
<rater-sect index="2" mgt-only="false">
  <rater-sect-name><![CDATA[Rater List]]></rater-sect-name>
   <fm-sect-config>
    <rating-label><![CDATA[Rating]]></rating-label>
    <rating-label-others><![CDATA[Rating]]></rating-label-others>
    <default-rating><![CDATA[unrated]]></default-rating>
    <hidden-strength-threshold>0.0</hidden-strength-threshold>
    <blind-spot-threshold>0.0</blind-spot-threshold>
   </fm-sect-config>
  <rater-config>
    <date-column-format>MM/dd/yyyy</date-column-format>
    <min-rater-count>0</min-rater-count>
    <max-rater-count>50</max-rater-count>
    <min-rater-complete-count>0</min-rater-complete-count>
    <default-rater category="Direct Report"><![CDATA[ED]]></default-rater>
    <default-rater category="Manager"><![CDATA[EM]]></default-rater>
    <default-rater category="Self"><![CDATA[E]]></default-rater>
  </rater-config>
</rater-sect>
```

> → Remember
>
> This code snippet is a sample configuration. The exact configuration depends on your system settings.

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2.1.7 Competency Section

You can use this section to specify the competencies that are evaluated in a form.

The Competency section lists the competencies or competency behaviors that a manager and others evaluate during a review. A form can have several Competency sections, which work in the same way. In each section, competencies can be added as Core Competencies, Custom Competencies (also known as Hardcoded Competencies) and Job Role Competencies. Those competencies can be prepopulated or added manually. Each competency ID can appear only once in a form.

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2.1.7.1 Custom Competencies

You can enable custom competencies by configuring your template using XML.

Custom competencies are supported in both 360 Reviews v11 and 360 Reviews - SAP Fiori Version. You can only add custom competencies via XML configuration of your template. This functionality isn't currently available using *Manage Templates* in *Admin Center*. After you add custom competencies, the *Custom* checkbox, which is grayed out in your template, will be checked automatically.

> → 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.

Hard Code Example

```
<fm-competency index="0" removable="false">
    <fm-comp-id>19819</fm-comp-id>
    <fm-comp-name><![CDATA[]]></fm-comp-name>
    <fm-comp-desc><![CDATA[]]></fm-comp-desc>
</fm-competency>
```

In Context

```
<?xml version="1.0" encoding="UTF-8"?>
<!DOCTYPE competency-sect SYSTEM "sf-form.dtd">
```

```
<competency-sect index="4" configurable="true" mgt-only="false" use-
jobcode="true" use-core-comp="true" category-filter-opt="no-filter" no-
rate="false" no-weight="true" summ-opt="999" split-cmt="false" rating-
opt="0" cmt-opt="2" suppress-item-comments="0" behavior-rating-opt="0"
behavior-cmt-opt="1" behavior-mode-opt="0" in-summ-display="true" in-overall-
rating="true" no-group="true" use-behavior="false" if-no-ratings-then-ignore-
section="true" lock-item-weights="false" in-objcomp-summ-display="false" in-objcomp-
summ-overall-rating="false" show-comp-expected-rating="false" show-comp-proficiency-
level="false" comp-expected-rating-format="0" show-behavior-expected-rating="false"
behavior-expected-rating-format="0" behavior-weighted="false" min-competencies-
required="-2147483648" max-competencies-allowed="2147483647" sect-mode="normal"
ez-rater-expand-all="false" show-calculated-section-rating="true" lock-behavior-
content="false" hide-waca="false">
  <comp-sect-name msgKey="3d6e257db20b4884bf6b67cea8c7dd3f_1573629499874"><!
[CDATA[Competency Feedback]]></comp-sect-name>
  <comp-sect-intro msgKey="5bdedcff1d8949edb66793ff048b68b8_1573629499874"><!
[CDATA[<b>INSTRUCTIONS</b>: Please respond to the following statements as they
relate to the person whose name appears on this form. Please select the rating that
best describes the individual.]]></comp-sect-intro>
  <fm-sect-config>
    <rating-label msgKey="PM_RatingLabel_Rating"><![CDATA[Rating]]></rating-label>
    <rating-label-others msgKey="PM_RatingLabelOthers"><![CDATA[Rating]]></rating-
label-others>
    <default-rating><![CDATA[Select one...]]></default-rating>
    <unrated-rating><![CDATA[Unable to Rate]]></unrated-rating>
    <hidden-strength-threshold>1.0</hidden-strength-threshold>
    <blind-spot-threshold>1.5</blind-spot-threshold>
    <required-fields>
      <role-name>*</role-name>
      <field refid="item-rating" min-value="-1.0" max-value="-1.0"/>
      <route-step stepid="*"/>
      <send-action sendid="complete_360"/>
    </required-fields>
    <default-item-comments-label><![CDATA[Comments]]></default-item-comments-label>
    <num-decimal-places>2</num-decimal-places>
    <publish-button-label><![CDATA[null]]></publish-button-label>
  </fm-sect-config>
  <action-permission type="none">
    <role-name>*</role-name>
    <action refid="add-item"/>
    <action refid="remove-item"/>
    <route-step stepid="*"/>
  </action-permission>
  <action-permission type="enabled">
    <role-name>EM</role-name>
    <action refid="add-item"/>
    <action refid="remove-item"/>
    <route-step stepid="*"/>
  </action-permission>
  <action-permission type="enabled">
    <role-name>*</role-name>
    <action refid="my-team-rater"/>
    <route-step stepid="*"/>
  </action-permission>
  <action-permission type="none">
    <role-name>E</role-name>
    <action refid="my-team-rater"/>
    <route-step stepid="*"/>
  </action-permission>
  <sect-weight>100.0</sect-weight>
  <fm-sect-scale show-value="true">
    <scale-source>1</scale-source>
    <scale-id><![CDATA[Performance Rating Scale]]></scale-id>
    <scale-type><![CDATA[null]]></scale-type>
  </fm-sect-scale>
  <fm-competency index="0" removable="false">
    <fm-comp-id>19819</fm-comp-id>
    <fm-comp-name><![CDATA[]]></fm-comp-name>
```

```
    <fm-comp-desc><![CDATA[]]></fm-comp-desc>
  </fm-competency>
  <meta-grp-label><![CDATA[Group]]></meta-grp-label>
</competency-sect>
```

2.1.7.2 Attributes of Competency Section

The following table describes the attributes of Competency section in a 360 Reviews form.

> → 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.

Attributes	Description
Index	The order in which sections are displayed in the form is controlled by section index number starting with `index="0"`. As a result, the form XML can list sections in any order. When you move sections using Provisioning the index number assigned to a section will be updated automatically to reflect how you've rearranged the sections in the form.
configurable	`true` if users are allowed to add or remove items within the section. When it's set to `true`, the *Nonremovable for Raters* checkbox will appear on a form. To hide the checkbox if it's not needed, you can also select *Hide the Nonremovable checkbox on a form in the Modify stage*, in *Admin Center* > *Form Template Settings*. ℹ Note In 360 Reviews, even if translations of competencies have been configured in *Manage Competencies*, when users add competencies in 360 forms, the competencies aren't translated in the list page. To avoid this, you should include a message key in any of the elements of the Competency section, for example, `<comp-sect-name msgKey="PERFORMANCE_COMPETENCY_SECTION"><![CDATA[Competency]]></comp-sect-name>`. In 360 Reviews - SAP Fiori Version, you don't have to take this extra effort.
mgt-only	Set this attribute to true to allow the manager or the HR to see this section.

Attributes	Description
use-jobcode	Default is `false`. Set to `true` to auto-populate the section with related competencies. **Note** If use-jobcode is set to `true`, after you've configured competencies in different languages in *Admin Center* > *Competency Libraries*, you need to map the competencies of the configured languages to the job code separately. Go to *Admin Center* > *Families and Roles*, switch the language to the one you've configured, and add the competencies to the job code accordingly.
category-filter-opt	Specified-category limits competencies as specified by comp-category
no-rate	`false` if show rating scale for items within the section
no-weight	When no-weight is set to `false` item weights are shown within the section, and the section's average rating is used in the form's calculated overall rating. When no-weight is set to `true` then the ad hoc report will no longer generate a report on the section weight of this section. Once it's set to `false`, ad hoc report can pull the section weight again.
summ-opt	Maximum number of section items for section summary to be displayed; to turn on section summary at all times, then make it 0; to turn off the section summary at all times, then make it a large number, for example, 99999
split-cmt	When `split-cmt="true"` is configured, subject and manager's comments are displayed side by side **Note** In Performance Management v12 Acceleration, split-cmt is always "true"
rating-opt	**Rating Option 0:** Only official rating (item-rating) appears, and is accessible by everyone with access to the form. **Note** 360 form only supports `rating-opt=0`.

Attributes	Description
cmt-opt	`cmt-opt=0` Show both item and section comments `cmt-opt=1` Show only section comments, no item comments. `cmt-opt = 2`. Show only item comments, no section comments `cmt-opt=3` Show no item and section comments
suppress-item-comments	0: do NOT hide item comments (**DEFAULT**) 1: suppress behavior comments but allow competency comments 2: suppress competency comments but allow behavior comments 3: suppress item comments **Note** `suppress-item-comments=1,2,3` isn't supported in Performance Management v12 Acceleration.
behavior-cmt-opt	0: Show behavior item comments (and if applicable, the evaluator* rating) 1(default value): Don't Show any behavior item comments or evaluator* ratings behavior-rating-opt

Attributes	Description
behavior-mode-opt	0: This is the Default mode. In this mode, the competency behaviors don’t get displayed above or below the competency description. Behavior mode '0' supports the existing configuration, where a user manually rates on the behavior items and those ratings are used to generate a "Calculated Competency Rating" (if the Calculation on form is enabled in the form template XML). This mode is also used for backwards compatibility for existing forms. 1: When the behavior-mode-opt is set to '1', the Behavior items are displayed below the competency rating. Only the behaviors mapped to the job code are displayed. Therefore, this feature will only work when the user has a valid jobcode. If the competency doesn’t have any behaviors, then none are displayed. 2: When the behavior-mode-opt is set to '2', the Behavior items are displayed above the competency rating. Only the behaviors mapped to the job code are displayed. Therefore, this feature will only work when the subject has a valid jobcode and `use-jobcode` is set to true. If the competency doesn’t have any behaviors, then none are displayed. 4:When the behavior-mode-opt is set to '4', Competencies must be manually added to the form, and all behaviors for competencies added will be displayed on the form below the competency rating, regardless of the jobcode-behavior mapping. 5: When the behavior-mode-opt is set to '5', Competencies must be manually added to the form, and all behaviors for competencies added will be displayed on the form above the competency rating, regardless of the jobcode-behavior mapping. **Note** For option 4 and 5: This feature will only work when `use-jobcode` is set to false.
in-summ-display	true ratings and weightings from this section will be displayed in the Summary Sect; default is true; in-summ-display="true"
in-overall-rating	True ratings from this section are used in calculating the Calculated Form rating; default is true; the "bk" value is for backward compatibility.
no-group	True is default False = group selection is displayed if groups have been defined in the Meta section
use-subtopic	Don’t use this attribute. Replaced by use-behavior

Attributes	Description
use-behavior	If you want to rate by behaviors, set `use-behavior` to `true` and `behavior-mode-opt` to `0`. If you want to show behaviors but not rate them, set `use-behavior` to `false` and `behavior-mode-opt` to a non-zero value. How the behaviors are displayed is determined by the specific value you set for `behavior-mode-opt`. For detailed information, see the part of `behavior-mode-opt` in this table.
if-no-ratings-then-ignore-section	True is default; don’t include this section in the Calculated Form rating if no competencies are rated False = use zero for this section in calculating the Calculated Form Rating
lock-item-weights	0: Show behavior item comments (and if applicable, the evaluator*lock-item-weights=false. Allow the weight of each competency to be edited. lock-item-weights=true. Doesn’t allow the weight of competency to be edited.
show-comp-expected-rating	true if showing the competency's expected rating for the job role, required for showing the gap between expected and actual competency rating; default is false
comp-expected-rating-format	0: Default. Showing the expected rating in % 1: Converting the % to a score normalized to the section scale
show-behavior-expected-rating	False: Default. Not showing behavior's expected rating for the job role
behavior-expected-rating-format	0: Default. Showing the expected rating in % 1: Converting the % to a score normalized to the section scale
behavior-weighted	True: Behavior is weightedFalse: If equally weighted and no weight fields will be displayed for Behaviors
sect-mode	normal or EZ-Rater. When it’s set to EZ-Rater mode, EZ-Rater UI is shown while section summary and other item fields are ignored. Behavior will only show on the form when `use-behavior` is set to `true`.
ez-rater-expand-all	true or false, if the section is in EZ-Rater mode, and this is true, then expand all objective details
show-calculated-section-rating	true or false. True if showing the section calculated rating.

Attributes	Description
hide-waca	Determines whether or not to hide the Writing Assistant. This is only applicable when the company or form template has been configured to display the Writing Assistant. True: hide writing assistant False: exposeWriting Assistant
min-competencies-required max-competencies-allowed	There's optional minimum/maximum threshold for the number of competencies that must/can be included on 360 forms. If specified, the validation will occur when a 360 form is about to be sent to the Evaluation stage. If validation fails, the user will see a warning message, and won't be able to route or complete the form. **i Note** In 360 Reviews, if there are many steps in Modify stage, then only the step before the Evaluation stage does the validation. *min-competencies-required: this represents the minimum number of competencies that must be in this section to allow the form to be routed. *max-competencies-allowed: this represents the maximum number of competencies that are allowed to be in this section, else the form cannot be routed. You can set just a min, or just a max, or both.
lock-behavior-content	If behavior-mode-opt is set to 0, this attribute is assumed to be false (default). behavior-mode-opt is nonzero and lock-behavior-content is set to false: Behavior list isn't hardcoded to the form during form creation and form modification and the behavior list is linked to the corresponding competency. In this case, when jobcode changes or the behavior name or the description is updated, the behavior for the existing form instances reflect the changes. behavior-mode-opt is nonzero and lock-behavior-content is set to true: Behavior list is hardcoded to the form during form creation and form modification, rather than being linked to the corresponding competency. In this case, when jobcode changes or the behavior name or the description is updated, the behavior for the existing form instances don't reflect the changes.
num-decimal-places	This attribute configures the number of decimal places for calculated ratings in the competency section. The default value is 2.

2.1.8 Goal Section

You can use this section to define all the objectives or goals that will be evaluated during a review event.

Goals sections can either start out blank where you manually add the goals you want to review, or they can start out with the relevant goals already identified and listed in the form. In either case, once you have goals in the section, you can review them. Goals can be rated by manager only or by both the manager and employee or even by a third party.

When you print a 360 Reviews form (V11) with goal sections, the goal names show on gray bar with auto-numbering if obj-plan-number-format is configured in the goal template. Otherwise, the goal names show beneath the gray bar.

You can configure the 360 Goal section in the same way as a Performance Management form.

XML Example

```
<!DOCTYPE objective-sect SYSTEM "sf-form.dtd">
<objective-sect index="5" configurable="true" mgt-only="false" use-jobcode="false"
no-rate="true" develop-goal="false" show-learning-activity-competency="false" no-
weight="true" summ-opt="0" split-cmt="false" rating-opt="0" cmt-opt="3" in-summ-
display="true" in-overall-rating="true" no-group="true" use-milestone="false"
if-no-ratings-then-ignore-section="true" lock-item-weights="false" in-objcomp-summ-
display="false" in-objcomp-summ-overall-rating="false" auto-pop-weights="false"
show-obj-expected-rating="false" min-goals-required="-2147483648" max-goals-
allowed="2147483647" allow-draft-tgm-goals="false" hide-addexistinggoals-btn="true"
sect-mode="normal" ez-rater-expand-all="false" obj-edit="form" show-calculated-
section-rating="true" avoid-obj-plan-state-change-by-multiple-forms="false">
  <obj-sect-name><![CDATA[Objective]]></obj-sect-name>
  <obj-sect-intro><![CDATA[<p>Enter your objectives here </p>
]]></obj-sect-intro>
  <fm-sect-config>
    <rating-label><![CDATA[Rating]]></rating-label>
    <rating-label-others><![CDATA[Rating]]></rating-label-others>
    <default-rating><![CDATA[unrated]]></default-rating>
    <unrated-rating><![CDATA[]]></unrated-rating>
    <hidden-strength-threshold>0.0</hidden-strength-threshold>
    <blind-spot-threshold>0.0</blind-spot-threshold>
    <num-decimal-places>2</num-decimal-places>
    <publish-button-label><![CDATA[Publish Content]]></publish-button-label>
  </fm-sect-config>
  <sect-weight>0.0</sect-weight>
  <sect-weight-4-objcomp-summary></sect-weight-4-objcomp-summary>
  <fm-sect-scale show-value="true">
    <scale-source>1</scale-source>
    <scale-id><![CDATA[Default Scale]]></scale-id>
    <scale-type><![CDATA[DROPDOWN]]></scale-type>
  </fm-sect-scale>
  <obj-sect-type autosync="false"><![CDATA[plan]]></obj-sect-type>
  <obj-sect-plan-id>5</obj-sect-plan-id>
  <meta-grp-label><![CDATA[Group]]></meta-grp-label>
</objective-sect>
```

→ Remember

This code snippet is a sample configuration. The exact configuration depends on your system settings.

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2.1.8.1 Attributes of the Goal Section

The table below describes the attributes of the Goal Section.

Attribute	Description
Index	The order in which sections are displayed in the form is controlled by section index number starting with `index="0"`. As a result, the form XML can list sections in any order. When you move sections using Provisioning the index number assigned to a section will be updated automatically to reflect how you have re-arranged the sections in the form. → 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.
configurable	'True' if users are allowed to add/remove items within the section
mgt-only	Control if only manager or HR can see this section
use-jobcode	Not Supported
no-rate	'False' if rating scale for items appears within the section. 'True' if rating scale does not appear within the section.
no-weight	When no-weight is set to 'false', item weights are shown within the section, and the section's average rating is used in the form's calculated overall rating. When no-weight is set to 'true', then item weights do not appear within this section.

Attribute	Description
develop-goal	Set to 'False' if the you are configuring this section for performance goals. Set to 'True' if the you are configuring this section for development goals.
summ-opt	Not supported.
split-cmt	When `split-cmt="true"`,subject and manager's comments are displayed side by side.
rating-opt	**Rating Option 0:** Only one rating appears, and is accessible by everyone with access to the form. **Rating Option 1:** The employee additionally has a rating that only they can access. The top rating is still accessible by everyone, and is the rating of recored and the item-rating. **Rating Option 2:** Everyone who has access to the form in edit mode has their own rating box. The top rating box still appears, and is the rating of record and the item-rating, but is normally accessible only to the manager. **Rating Option 3:** The manager rating is the rating of record and the item-rating. The manager rating does not need to be permissioned because only the manager can edit the manage rating, and only the employee can edit the employee rating. This is the recommended configuration. **Note** 360 form only supports `rating-opt=0`.
cmt-opt	`cmt-opt=0` Show both item and section comments `cmt-opt=1` Show only section comments, no item comments. `cmt-opt = 2`. Show only item comments, no section comments `cmt-opt=3` Show no item and section comments;
in-summ-display	'True' if ratings and weightings from this section will be displayed in the Summary section.The default value is true;
in-overall-rating	Set to 'True' if the section is to be included in the document overall rating calculation if applicable; default is true; the "bk" value is for backward compatibility. Set to 'False' if you do not wish to include this section in the document overall rating calculation.
no-group	Not supported.
use-milestone	Not supported
lock-item-weights	`lock-item-weights=false`: Allow the weight of each competency to be edited. `lock-item-weights=true`: Does not allow the weight of competency to be edited.
auto-pop-weights	Set to 'True' if you want to auto populate the goal weights with their weights in the goal plan. Set to 'False' if you do not want to auto populate the goal weights with their weights in the goal plan.
show-obj-expected-rating	Set to 'True' if you want to show the objective's expected rating next to each goal. Note that though this attribute is in the DTD file, it's not applicable for 360 Reviews.

Attribute	Description
sect-mode	Normal or EZ-Rater. EZ-Rater mode shows EZ-Rater rater ui, section summary and other item fields are ignored.
ez-rater-expand-all	Only valid if the section is in EZ-Rater mode, and if this is 'true', then expand all objective details
show-calculated-section-rating	'True' if showing the section calculated rating.
obj-edit	`Form` edit goal in place.
min-goals-required max-goals-allowed	There is optional minimum/maximum threshold for the number of goals that must/can be included on 360 forms. If specified, the validation will occur when a 360 form is about to be sent to the Evaluation stage. If validation fails, the user will see a warning message, and will not be able to route or complete the form. **Note** In 360 Reviews, if there are many steps in Modify stage, then only the step before the Evaluation stage does the validation. `min-goals-required`: this represents the minimum number of goals that must be in this section to allow the form to be routed. `max-goals-allowed`: this represents the maximum number of goals that are allowed to be in this section, else the form can not be routed. You can set just a min, or just a max, or both.
num-decimal-places	This attribute configures the number of decimal places for calculated ratings in the goal section. The default value is 2.

2.1.9 Summary Section

The Summary section displays summarized information about all the evaluation sections on the form in one central area.

For example, if you have two goal sections and two competency sections in your form, summaries about the content in all four sections would be shown in the Overall Summary section. The amount of summarized information is determined by the content in the working sections of the form. For example, if your form includes ratings and weights, the average score from these values is shown for each section, as well as a general overall performance score. The Overall Summary section can include a calculated overall rating, a manual overall rating or both. The rating labels are configurable. In a summary section, manual rating is the rating of record when both manual and calculated ratings are options. If there is only a calculated rating, this becomes the rating of record.

The summary-sect:

- Can include an overall rating, which is manually set or calculated.
- Can display an overall non-editable calculated score for the form.
- Can display a summary list of objectives and competencies with ratings and weights.
- Can include a section comment box.
- Displays final ratings in a completed form as text, graphical bars or both.

If a meta group is defined you can display a matrix summary showing how many objectives/competencies there are in each group, however, this is rarely used.

The manual-rating option determines if a form reviewer can set the overall rating manually, `true` or if the overall rating should be calculated and not able to be edited, `false`.

> **Example**
>
> You want to allow reviewers to manually set the overall rating instead of using a calculated rating when you want the overall rating to be a whole number rather than a decimal number, for example, if a calculated rating is 2.3, the reviewer can set the overall rating to 2.0.

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2.1.9.1 Configuring the Attributes and Elements in the Summary Section

From the Summary XML template you can configure the interface that is used for editing the Summary Section of the form.

To configure the XML template you need to get familiarized with the following:

- Attributes
- Elements

Here's an example of the XML syntax of the attributes in goals:

```
<?xml version="1.0" encoding="UTF-8"?>
<!DOCTYPE summary-sect SYSTEM "sf-form.dtd">
<summary-sect
    index="8"
    mgt-only="false"
```

```
    manual-rating="true"
    override-unrated="true"
    split-cmt="true"
    rating-opt="1"
    cmt-opt="0"
    show-listing="true"
    rating-mode="text"
    use-adjusted-scale-for-section-header-rating="0"
    show-group-matrix="true"
    overall-rating-display-order="manual-calc">
  <summary-sect-name><![CDATA[Summary]]></summary-sect-name>
  <summary-sect-intro><![CDATA[]]></summary-sect-intro>
  <fm-sect-config>
    <rating-label><![CDATA[Rating]]></rating-label>
    <rating-label-others><![CDATA[Rating]]></rating-label-others>
    <default-rating><![CDATA[unrated]]></default-rating>
    <unrated-rating><![CDATA[Too new to rate]]></unrated-rating>
    <hidden-strength-threshold>0.0</hidden-strength-threshold>
    <blind-spot-threshold>0.0</blind-spot-threshold>
    <num-decimal-places>2</num-decimal-places>
    <publish-button-label><![CDATA[Publish Content]]></publish-button-label>
  </fm-sect-config>
      <show-gap-competencies-in-summary/>
      <allow-close-individual-gap-in-summary/>
      <show-gap-behaviors-in-summary/>
      <show-behaviors-in-summary/>
</summary-sect>
```

Attributes

Attributes are a list of options that affect the behavior of the element. For example, the attribute index controls the order in which the sections are displayed in the form.

Attribute	Description
Index	The order in which sections are displayed in the form is controlled by section index number starting with index="0". As a result, the form XML can list sections in any order. When you move sections using Provisioning the index number assigned to a section will be updated automatically to reflect how you have re-arranged the sections in the form. → 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.
mgt-only	obsolete
ask-4-comment	obsolete; set to "false" always
manual-rating	true to allow a user to put an overall rating that is different from the calculated one (if any); if set to false, the summary-rating is the same as the calculated rating and fm-sect-scale is ignored if any, and users are not allowed to override it.

Attribute	Description
override-unrated	This is applicable only if manual-rating is true. • If manual rating is false, override-unrated is ignored. • If manual-rating is true and override-unrated is false, then the overall rating is always the manual rating. • If manual-rating is true and override-unrated is true, then the overall rating will be the manual rating unless the manual rating is unrated. • If the manual rating is unrated when the form is at the current step, then the overall rating won't be overriden by the calculated rating. • If the manual rating is unrated when the form is routed, then the overall rating will default back to the calculated rating.
split-cmt	true if displaying subject and manager's comments side by side
rating-opt	0: default, no ratings next to each user's comment
cmt-opt	0: Show section comments; default 1: No section comments;
show-listing	true if allow listing; false if not; default is true
rating-mode	"text" - default; display ratings in text "graph" - display ratings in graphical form; "mixed" - display ratings in both text and graphical forms. If you use "graph" or "mixed" for rating-mode the graphical rating bars only appear in a completed document.
use-adjusted-scale-for-section-header-rating	Controls how the overall section rating is displayed in the summary section. If using text-based ratings, you have the option of having subtotals to use the same adjusted scale values from the meta section. 0 - DEFAULT: display the manual/calculated rating. For calculated, there is no rating label but just rating value. 1 -Text only --take the calculated/manual section rating and use the adjusted scale (defined in the meta section) to display the adjusted rating label and/or the adjusted rating value. 2 - a combination of 0 and 1. display the original rating but use the label from the adjusted scale.
show-group-matrix:	true if allow group matrix display in the section; default is true
num-decimal-places	This attribute configures the number of decimal places for calculated ratings in the summary section. The default value is 2.

Elements

This table describes the Elements for Goals:

Element	Description
summary-sect-name	The name of the section. See fm-sect-name for details.

Element	Description
summary-sect-intro	Introductory text that appears in the section. See fm-sect-intro for details.
fm-sect-config	Controls the color of the section. See fm-sect-config for details.
fm-sect-config	See fm-sect-config for details.
field-permission	See field-permission for details.
fm-sect-scale	Obsolete. It is replaced by fm-sect-scale in fm-meta if any.
summary-rating	Overall rating of the 360 form if any. This defaults to the calculated average of all sections included in overall calculation.
calc-summary-rating	Calculated Overall rating of the 360 form if any.
unadjusted-overall-summary-rating	the actual calculated overall form rating (ie, before any adjustments based on the adjusted-scale.
overall-rating-label	A non-zero-length string (including whitespace) will over-ride the default "Overall Form Rating" label. For example: `<overall-rating-label><![CDATA[Overall Ranking:]]></overall-rating-label>`
calc-rating-label	A non-zero-length string (including whitespace) will over-ride the default "Calculated Form Rating" label. For example: `<calc-rating-label><![CDATA[Computed Ranking (4 = 100%):]]></calc-rating-label>`
group-matrix-other-label	A non-zero-length string (including whitespace) will over-ride the default "Other" label.
show-gap-behaviors-in-summary	The behaviors for each competency, if rated by behavior, is shown in the summary section of the form along with the gap analysis.
show-behaviors-in-summary	The behaviors for each competency, if rated by behavior, is shown in the summary section of the form.
show-gap-competencies-in-summary	The gap analysis scale for competencies will appear in the Summary section of the form.
allow-close-individual-gap-in-summary	If this element is added to the Summary section of the form a clickable link will be available in the form for each competency item to add related development goal.

2.1.10 Custom Section

You can use custom sections to gather information that is not objective or competency based.

Custom section is a customized section to collect feedbacks from raters. It is not visible in the detailed 360 report. You can configure the 360 Custom Section in the same way as a Performance Management form.

Fields contained within a custom section consists of "custom fields" that are rendered "top-down" in a single column. The fields can be pre-populated with defaults that are editable to form reviewers. Custom fields are defined using fm-element.

i Note

If you use a checkbox type you must specify the value such as True, Y, or Yes. This is the value that is stored when user checks the box. If you do not specify a value, then no value is stored in the database.

XML Example

```
\\
<fm-sect index="8" mgt-only= " false " split-cmt= " false " cmt-opt= "1">
   <fm-sect-name><![CDATA[Additional Comments]]></fm-sect-name>
   <fm-sect-intro><![CDATA[Please use the spaces below to document areas of
strength and areas  for improvement.]]></fm-sect-intro>
   <fm-sect-config>
      <rating-label><![CDATA[Rating]]></rating-label>
      <rating-label-others><![CDATA[Rating]]></rating-label-others>
      < default-rating><![CDATA[unrated]]></ default-rating>
      <hidden-strength-threshold>0.0</hidden-strength-threshold>
      <blind-spot-threshold>0.0</blind-spot-threshold>
   </fm-sect-config>
  <fm-element index= "0" type= "9">
      <ekey><![CDATA[TeamPlayerCheckBox]]></ekey>
      <ename><![CDATA[<b>Check here to indicate that if the Employee is a team
player</b>]]></ename>
     <evalue><![CDATA[Y]]></evalue>
   </fm-element>
  <fm-element index= "1" type= "3">
      <ekey><![CDATA[Date]]></ekey>
      <ename><![CDATA[How does the employee contribute to helping the team reach
their overall objectives?]]></ename>
     <evalue><![CDATA[]]></evalue>
   </fm-element>
  </fm-sect>
\\
```

→ Remember

This code snippet is a sample configuration. The exact configuration depends on your system settings.

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2.1.11 Post Review Phase

The Post Review Phase can be used after the Evaluation Phase but before the Completion or Signature Phases.

In this phase, you can:

- Add more participants, for example, in the case where several of the originally-invited participants declined.
- Send forms back to participants to ask them to modify their feedback, for example, where the original feedback includes too much information to ensure anonymity or includes offensive or overly sensitive information.
- Insert summarizing comments that let you present comments or analysis on the overall feedback.

What you can do	Comments
Allow a manager to review 360 participant feedback before sending it to the employee	This is a signature step added to the route map
Let the manager see the Detailed 360 Report before anyone else	You can control the timing and access to the Detailed 360 Report using the button permission for *detailed-360-report* in the form template XML and then setting, under form template administration, the Detailed 360 Report permission control to *Use Form XML*.
Let the manager see participant feedback	Permission drill-down access to the manager
Allow manager to add additional participant or send forms back to participants for changes	You can create a competency section and make it editable during a 360 signature step. This is done by adding a sub-element <editable-in-signature-step> to a competency section. This is only valid for competency sections and 360 form templates. To show this section only in during a signature step, use the section permissions to hide it at all other times. The primary use case is to employ the section comments, or repurpose competencies and use item comments. These comments appear in the Detailed 360 Report. Ratings entered into this section do not effect the overall 360 score and do not appear in the Detailed 360 Report.

Sample code for post review

```
<!DOCTYPE competency-sect SYSTEM "sf-form.dtd">
    <competency-sect index= "7" configurable= "false " mgt-only= "false " use-
jobcode= "false "
      category-filter-opt= "no-filter" no-rate= "true " no-weight= "true " summ-
opt= "99" split-cmt= "true " rating-opt= "0"
      cmt-opt= "1" suppress-item-comments= "0" behavior-rating-opt= "0" behavior-
cmt-opt= "0" behavior-mode-opt= "0"
      in-summ-display= "false "
      in-overall-rating= "false "
      no-group= "false "
      use-behavior= "false " if-no-ratings-then-ignore-section= "false " lock-item-
weights= "false " in-objcomp-summ-display= "false "
```

```
        in-objcomp-summ-overall-rating= "false " show-comp-expected-rating= "false "
show-comp-proficiency-level= "false "
        comp-expected-rating-format= "0"
        show-behavior-expected-rating= "false " behavior-expected-rating-format= "0"
        behavior-weighted= "false "
        sect-mode= "normal" ez-rater-expand-all= "false "
        show-calculated-section-rating= "true " lock-behavior-content= "false " hide-
waca= "false ">    <comp-sect-name><![CDATA[Overall 360
    Comments]]></comp-sect-name>   <fm-sect-config>
    <rating-label><![CDATA[Rating]]></rating-label>
    <rating-label-others><![CDATA[Rating]]></rating-label-others>     < default-
rating><![CDATA[unrated]]></ default-rating>     <hidden-strength-threshold>0.0</
hidden-strength-threshold>
    <blind-spot-threshold>0.0</blind-spot-threshold>
    <section-manager-comments-label><![CDATA[{0}'''s Comments]]></section-manager-
comments-label>
    <section-subject-comments-label><![CDATA[{0}'''s Comments]]></section-subject-
comments-label>
    <manager-comments-label><![CDATA[{0}'''s Comments]]></manager-comments-label>
    <subject-comments-label><![CDATA[{0}'''s Comments]]></subject-comments-label>
    <section-permission type= "hidden">       <role-name>*</role-name>
    <route-step stepid= "EmpNom"/>       <route-step stepid= "MgrNom"/>
<route-step stepid= "HRNom"/>       <route-step stepid= "EmpLaunch"/>
    <route-step stepid= "Eval"/>     </section-permission>
    <num-decimal-places>2</num-decimal-places>     <publish-button-label><!
[CDATA[Publish
    Content]]></publish-button-label>   </fm-sect-config>   <editable-in-signature-
step/>
    <sect-weight>0.0</sect-weight>   <fm-sect-scale show-value= "true ">     <scale-
source>1</scale-source>
    <scale-id><![CDATA[360 Scale]]></scale-id>     <scale-type><!
[CDATA[DROPDOWN]]></scale-type>
    </fm-sect-scale>   <meta-grp-label><![CDATA[Group]]></meta-grp-label> </
competency-sect>
```

→ Remember

This code snippet is a sample configuration. The exact configuration depends on your system settings.

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2.1.12 Configuring Rating Scale Type

You can associate different rating scale types with goal sections and competency sections.

The rating scale type is configured in form template XML file by using the fm-sect-scale element. For example:

```
<fm-sect-scale show-value="true">
        <scale-source>1</scale-source>
        <scale-id><![CDATA[2005b]]></scale-id>
        <scale-type><![CDATA[DROPDOWN]]></scale-type>
</fm-sect-scale>
```

In 360 Reviews forms of SAP Fiori version, the scale type is displayed as dropdown list in related section for the following configurations:

- When you select the *Hide numeric rating values (only show text labels)* option through *Manage Templates* > *General Settings*.

  > **i Note**
  >
  > This option applies to all sections in a form.

- When the show-value attribute is set to false.
- When the maximum rating value is larger than 5. For example, you set up a 6-point rating scale.
- When the reverse-scale attribute is set to true.

The 360 Reviews v11 Version and 360 Reviews - SAP Fiori Version support different rating scale types. For details, check the following table.

Comparison of Supported Ratings Scale Type Between 360 Reviews v11 Version and 360 Reviews - SAP Fiori Version

<table>
<tr><th>Scale Type</th><th>360 Reviews v11 Version</th><th>360 Reviews - SAP Fiori Version</th></tr>
<tr><td>Dropdown list</td><td rowspan="4">Support</td><td>Support</td></tr>
<tr><td>Radio</td><td rowspan="3">Not support

i Note

If you set the rating scale type to radio, horizontal radio, or free text for a 360 Reviews form of SAP Fiori version, it's automatically converted into star.</td></tr>
<tr><td>Horizontal radio</td></tr>
<tr><td>Free text</td></tr>
<tr><td>Star</td><td rowspan="2">Not support</td><td rowspan="2">Support</td></tr>
<tr><td>Circle</td></tr>
</table>

Parent topic: Configuring 360 Templates Using XML [page 17]

Related Information

General Settings [page 18]

2.2 Configuring 360 Templates Using Admin Center

You can create and configure form templates using *Admin Center*.

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

You can define the basic settings of a template in the General Settings section by using *Admin Center* > *Manage Templates* and selecting the template you want to configure. The key fields in General Settings include:

You can use the *Form Template Settings* page to configure the Administration settings before creating any 360 forms based on your new template.

2.2.1 Manage Templates Tool

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

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

In the **manage templates** tool you can:

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

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

Parent topic: Configuring 360 Templates Using Admin Center [page 50]

Related Information

General Settings [page 52]
360 Form Template Settings [page 53]

2.2.1.1 Creating a Form Template

Create a form template so that you can configure the form template for performance reviews.

Procedure

1. In *Admin Center*, go to *Manage Templates*.
   The *Manage Template* page opens.
2. Choose the correct tab for your purpose, such as *Performance Review* or *360 Multi Rater*.
3. Choose *Add a New Template*.
   The *SuccessStore* dialog box opens to display prebuilt templates.
4. Choose the template that you want to use.
5. Choose *Add to My Instance*.
6. In the *Save as New Template* dialog box, enter a name for your template.
7. Choose *Save*.

   A form template is created.

Next Steps

Configure the general settings and edit fields and sections of the form template.

2.2.2 General Settings

You can define the basic settings of a template in the General Settings section by using *Admin Center* > *Manage Templates* and selecting the template you want to configure. The key fields in General Settings include:

Field	Description
Name	Title of the template that will be visible to end users. Currently you can't add translations in the *Manage Templates* tool, but you can configure message keys in 360 form template XML to support translations.
Description	Short description of the form that is only visible in the "Manage Templates" area to administrators.
Route Map	Directs the workflow of the form during the review cycle and is required before saving the form template.
Rating Scale	The default scale for all sections of the performance form. If you choose to have a different scale for another ratable section (that is, Competencies, Goals, Summary), you may associate a scale to each of those sections individually.
Hide numeric rating values	The rating scale is a simple dropdown list with only the text of each scale anchor (that is, Exceeds Expectations) visible. If you're using 360 Reviews - SAP Fiori Version, when the field is enabled, the "star" or "circle" rating bubbles are no longer visible.
Unable to rate	Allows an additional selection added to the rating scale that is the equivalent of a "Not Applicable" score where there's no positive or negative impact to the subject of the form. This field overrides all other sections of the form that are ratable, so if only specific sections should have this option, configure in those respective sections, not General Settings.
Enabled anonymity in the 360 reporting functions	Select if you want to protect the anonymity of participants in the 360 detailed report. Only the aggregate scores are available.
Advanced Settings	Links to "Form Template Settings".

Parent topic: Configuring 360 Templates Using Admin Center [page 50]

Related Information

Manage Templates Tool [page 50]

360 Form Template Settings [page 53]

2.2.3 360 Form Template Settings

You can use the *Form Template Settings* page to configure the Administration settings before creating any 360 forms based on your new template.

You can use Categories, Roll-up, and Thresholds to help keep responses anonymous. You can also control who has access to the Detailed 360 report using Admin Tools Form Template Administration settings.

The Process Owner, Employee, Manager/HR, Approvers, and Users with Detailed Reporting Privileges can selectively be granted access to view the Detailed 360 Report. The Process Owner for a 360 for is the person who sends the 360 out for feedback. So, in other words, the last person to touch the form before it is sent out to the participants.

Setting	Description
Template Name	• the external name of your template • upon creation, forms will also include this name in the form title • template name can be changed at any time although not recommended • you can configure the template name in different languages **Note** If the form setting in *Company System and Logo Settings* is *All documents will display their form template name at the time the document was created. This option does not support translations of the document name*, • when the template name is changed after the form is launched, users can't see the changed form title in the form. • the form title isn't adapted to logged-in users' language settings, but is displayed in the default language. If the form setting is *All documents will display their current form template name as configured in the Form Template Administration settings. This option supports translations of the document name*, • when the template name is changed after the form is launched, users can see the changed form title in the form. • once the template name is configured in logged-in users' language, the form title is displayed in logged-in users' language. • form data reporting is driven off external name not internal id
Template Type	• not editable, read only • type is set when form template is uploaded • form XML syntax identifies template type
Last Modified	• not editable, read only • identifies when the template was uploaded or last modified in Provisioning

Setting	Description
Routing Map	• Determines the workflow/routing and stages of a form • Route map must already be defined before it can be associated with a template that is, available for selection in the drop down list • You can use another option in *Form Template Settings*, *Hide Route Map on the Form*, to show or hide the route map on 360 Reviews forms. If you select the option, the route map is hidden from all the participants; if you deselect it, the route map is visible to them and they can collapse or expand it.
Default Dates for Form Creation	Set the Default Start, End, and Due dates either Fixed or Relative to the: • Form Creation Date • Default Start Date • Default Due Date
Default Due Notification Date (in days)	Specifies the timeframe in which an email notice is sent to a user informing them that the form is due. The timeframe is a number of days in relation to the form's due date. For example, if you specify 7, the notice is sent 7 before the form is due. Regardless of this setting, the Document Due Notification will not be sent in the following circumstances: • If you select the Disable Due Notification option • If the user's email notifications are turned off (Turning Email Notifications On or Off for Users) • If the Document Due Notification email notification is turned off (Defining Your Company Email Notifications) This change applies to existing forms as well as newly created forms.
Default Late Notification Date (in days):	Specifies the timeframe in which an email notice is sent to a user informing them that the form is late. The timeframe is determined in relation to the form's due date. For example, you can specify that a notice is sent 7 after the form was due. Enter a number in this field. For example, enter 7 if you want the email notice sent 7 days after the form was due.
Default Due Notification Date (in days)	• used to set the default date upon which an email notification is sent to the user who has the form in his/her Inbox that the form due date is approaching • calculated based on form due date- number of days specified • emails are sent during off business hours, after midnight EST
Default Late Notification Date (in days)	• used to set the default date upon which an email notification is sent to the user who has the form in his/her Inbox that the form is past due • calculated based on form due date + number of days specified • emails are sent during off business hours, after midnight EST
Template Status	• choices are Enable or Disable • Enable – enables the form to be created by users assigned permission to create the form

Setting	Description
	• Disable – prevents the form from being created; does not revoke the permission to create the form from users who were granted permission
Template Flag	• choices are Public or Private • applicable to forms only, not notes • Public – forms are transferable whenever a manager-transfer process is started. For example, all public forms under the old manager are transferred to the new manager. Most forms are Public. • Private – forms are not transferred during the manager-transfer process. A Private form remains with the original manager, that is,. it will not be transferred with any public forms that are transferred to the new manager. • This flag has no impact on the route map and if there are any EM steps in the route map that have not yet been completed, these EM steps will reference and route the form to the new manager at that time.
Do Not Transfer Documents	If enabled, forms cannot be transferred. Setting this option disables all the options nested under this option. It means forms will not get transferred when the manager changes regardless of any other settings you have elsewhere. **Note** This is for current step only. Future steps will still show the new manager
Automatic Manager Transfer	Select... • Automatic insertion of new manager as next document recipient if not already: This will automatically select the new manager as the recipient of the form if not already selected. • Automatic Inbox Document Transfer To New Manager: This will automatically transfer the form to the new manager's inbox • Automatic En Route Document Transfer To New Manager: This form will get automatically forwarded to the new manager's for further action. • Automatic Completed Document Copy to New Manager: This will automatically copy the completed form to the new manager. • Hide Visibility After Document Transfer: After the form gets transferred the visibility of the form will be hidden from the old manager. • Automatic Process Owner Change To New Manager For In-Progress Documents When Old Manager is Process Owner (Only for 360) • Automatic Process Owner Change To New Manager For Completed Documents When Old Manager is Process Owner (Only for 360)
When transferring 360 documents from old manager`s inbox folder to new manager, do not auto decline old	Select this option when transferring 360 documents from old manager`s inbox folder to new manager, do not auto decline old manager`s participant forms in evaluation.

Setting	Description
manager`s participant forms in evaluation.	
When transferring 360 documents which are in evaluation stage, add new manager as a participant. (If new manager is a removed participant, he/she will be re-added.)	Select this option when transferring 360 documents which are in evaluation stage, add new manager as a participant. (If new manager is a removed participant, he/she will be re-added.)

When the system is configured to remove documents for inactive employees, apply these overrides so the system does not remove documents for this form template	• When an employee is set to inactive, this setting overrides the global setting that may remove inactive employee's documents. This setting may be useful when an employee is terminated yet still has an active form that entitles eligibility for incentive pay.
	  • Do Not Remove Inactive Employee's In-Progress Documents.
	  • Do Not Remove Inactive Employee's Completed Documents.
	  • Do Not Remove Inactive Employees' 360 Evaluation Documents

Default Targets	• choices are Self and Direct Reports, Self Only, or Direct Reports Only • Self and Direct Reports – enables a user to create a form for which he/she or one of his/her direct reports is the subject • Self Only – enables a user to create a form for which he/she is the subject • Direct Reports Only – enables a user to create a form for which one of his/her direct report is the subject • HR Reports Only- enables a user to create a form for which HR report is the subject • Self and Matrix Reports- enables a user to create a form for which he/she or one of his/her matrix reports is the subject • Matrix Reports Only- enables a user to create a form for which one of his/her matrix reports is the subject • the user creating the form is called the form originator • see also setting for *Allow form creator to select anyone as a subject*
Keep last touched version upon Document completion	If enabled, the version of the form on which the last action was performed is saved.
Enable Auto Logout at Session Timeout	If enabled, you will be automatically logged out of the system when the session gets timed out.
Enable Auto Restore Deleted Form When Importing User	• In the case of employees who've been deactivated and are reactivated, restores the most recent deleted for that employee when they are imported into the system. • Only forms that were in an in-progress state when deleted will be restored. Completed forms will not be restored. • If document transfer option is disabled, and the manager info has changed, the managers associated with the form at the time it was deleted will remain the same when the form is restored for the user • If the manager associated with the user has changed since the user was reactivated, the manager in the form will still remain the same as it was at the time the form was deleted.

Setting	Description
	• If document transfer option is enabled, and the manager info has changed, the managers associated with the form at the time it was deleted In this case, we will first restore the In-Progress documents and then follow the rest of the document transfer rules. • If form was out for feedback when deleted, form will be restored to individual who the form was with
Enable Spell Check	• Enables spell checking for each form comment box • A Spell Check button will be available with each item • Company must be provisioned with the spell checking feature. → 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.
Enable Legal Scan	If enabled, the form is scanned for potentially improper or discriminatory language in comment sections of form.
Disable Spell Check on Route	If you have enabled spell check in Provisioning, the spell check on route is enabled. With this feature, a spell check is run each time the form routes to the next step. To disable it, choose *Disable Spell Check on Route*. → 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.
Disable Legal Scan on Route	If you have enabled legal scan in Provisioning, the legal scan on route is enabled. With this feature, a legal scan is run each time the form routes to the next step. To disable it, choose *Disable Legal Scan on Route*. → 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.
Enable Writing Assistant	Displays a writing assistant hyperlink for each form comment box that provides context sensitive assistance to the form's content. Company must be provisioned with the writing assistant feature. → 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.

<table>
<tr><th>Setting</th><th>Description</th></tr>
<tr><td>Disable Ask for Edit Routing</td><td>Disables the edit functionality when using Get Feedback</td></tr>
<tr><td>Bypass Draft Routing</td><td>No longer allows users to create a new form as a draft version (Draft Mode). When you select this option, users won't be able to edit the form before routing it to others for evaluation. This change applies to newly created forms only, it doesn't affect existing forms.</td></tr>
<tr><td>Disable All Toolbar Buttons (overrides all button selections below)</td><td>If enabled, disables all the Toolbar Buttons</td></tr>
<tr><td>Disable All Toolbar Buttons (overrides all button selections below)</td><td>If enabled, hides all of the icons, and actions and history drop-downs at the top of the page.</td></tr>
<tr><td>Disable Print Button</td><td>If enabled, it hides the Print button.</td></tr>
<tr><td>Disable Send and Open Next Form Button</td><td>If enabled, it hides Send and Open Next Form button at the bottom of the Performance Form.</td></tr>
<tr><td>Disable Page Setup button</td><td>If selected, users can only print a 360 Reviews form, its Summary View, or its 360 Executive Review in its entirety; if not selected, users can specify which individual sections to include for printing.</td></tr>
<tr><td>Disable Delete button</td><td>If enabled, hides the delete action from the form list and the Actions menu on forms.

Note

The ability to delete forms is available to only form originators and the manager of the form subject.

If you only want to hide the delete action from the Actions menu on forms, enable Provisioning > Company Settings > Hide Delete Icon inside Form, and make sure Disable Delete button unchecked.

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.</td></tr>
<tr><td>Disable Note button</td><td>• If enabled, hides Notes information from the Supporting Information pod.</td></tr>
<tr><td>Disable Form button</td><td>If enabled, hides the Performance Forms selection from the History drop-down.</td></tr>
<tr><td>Disable 360 button</td><td>If enabled, hides the 360 Forms selection from the History drop-down.</td></tr>
<tr><td>Disable Info button</td><td>If enabled, it hides the document information that would otherwise be viewable in a pop-up window.</td></tr>
</table>

Setting	Description
	i Note The document info button displays info about the routing – who has handled the document in the past (and when they sent it to the next person), where it will go in the future.
Disable Download button	• i Note This option is available only for PM v11 forms, not for PM v12 Acceleration forms.
Disable Send button	• prevents users from being able to send a form • disabling the Send button will keep the form in the Inbox unless the form can be deleted or until the Send button is enabled to send the form onto Completion
Disable Send button for completed documents	If enabled, Send button for completed forms is disabled.
Disable Late Notification	• suppresses email notifications informing users when a form is late • turns off the notification for the form only and not for other forms that are enabled in the instance
Disable Due Notification	• suppresses email notifications informing users when a form is due • turns off the notification for the form only and not for other forms that are enabled in the instance
Disable Step Exit Notification	• suppresses email notifications informing users when a routing step has been completed, that is, when a form moves from one workflow stage to another • turns off the notification for the form only and not for other forms that are enabled in the instance
Allow form creator to select anyone as a subject	• allows users to select a form subject outside of self or direct reports • a "Find User" search box will appear in the New Document wizard
Allow Matrix Manager to Delete document if Delete button is available	If enabled, the matrix manager is allowed to delete the form if the Delete button is available.
Show Signoff routing step names in Signoff Stage	If enabled, the Signoff routing step names are displayed in Signoff Stage.
Show Participants in Status Summary (Applicable to Anonymous 360's only)	Applicable only for Anonymous 360s. Displays the names of the participants (in random order) in the Participant List summary during the evaluation phase of an Anonymous 360. This option is only applicable to Anonymous 360s. You can't use this option with Named 360 evaluations. By default, no participant names are listed for Anonymous 360s. When you select this option, you're allowing participant names to be displayed on the Participant List during the evaluation phase. Names are displayed in random order, with no way to correlate the names with actual reviews, so anonymity isn't jeopardized.

Setting	Description
	You might want to use this feature if you're also using the Enable Add New Participants after 360 Evaluation starts option, because your users can see who they've already chosen to participate, and if they need to add more users, they can ensure that they aren't selecting the same users.
Allow Re-Selection of Removed Participants to Feedback Team after 360 Evaluation starts	Allows employees to add back Participants they've deleted from the form. Now, when employees want to add back a deleted Participant, they can find the form in their En Route folder (My Forms page) and use the Add New Participants page to add the deleted Participant again. The deleted Participant will be shown with their original category settings.
Don't display the subject's Manager and HR Rep. by default as potential participants	If enabled, the subject's Manager and HR Rep. is not displayed by default as potential participants
Hide dropped users records in 360 Ad Hoc report (Important Note: Report synchronization is required after this configuration to ensure that dropped users in existing forms won't be displayed in 360 ad-hoc report. Go to *Provisioning* > *Company Settings*, select *360 Multi-Rater Subject* under *Ad Hoc Report Builder*, and choose *Sync* to create a job to synchronize data.) → 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.	
Category Weight Setting	Enabled any of the following: • Enable category weight normalization • Hide category weight tips in Summary View • Hide category weight legend in Detail Report

<table>
<tr><th>Setting</th><th>Description</th></tr>
<tr><td>Participants Threshold Control

Apply Threshold On..</td><td>Refers to the minimum number of participants required before the ratings and comments from peers will be displayed. The level can be set to:
Participant Level - Recommended
Item Level
The better choice is almost ALWAYS "Participant Level". The reason we recommend using Participant Level is because let's say 3 people have been asked to rate an employee. Each of those raters skip a question. The threshold is set = 3. That means none of the raters responses would show up (unless you have roll-up turned on). The user could end up missing valuable information that is included in those reviews</td></tr>
<tr><td>Enable 360 Drilldown Permission for...</td><td>Specifies which 360 Participants can view the individual evaluation results. You can choose more than one type of Participant. Your selections apply only to this type of form, and they override any default company settings.

i Note
These Participant options work in conjunction with each other, meaning users who fit in more than one category will get included. For example, if you select Manager/HR and Approvers because you want to exclude the subject of the evaluation (Employee), then make sure that the subject is not also one of the Approvers. Otherwise, the subject will be included, even though you didn't specifically choose the option.

The participant choices are:
Process Owner - The last person to modify the form before it's distributed to others for evaluation.
Employee The person who is the subject of the 360 evaluation.
Users With Detailed Reports Privilege Any person who also belongs to a user group that has the Detailed Reports Privilege associated with it.
Manager/HR The manager or the HR representative of the subject of the form.
Approvers Everyone who contributed to, or modified, the content of the form before it was distributed for evaluation.
This change applies to existing forms as well as newly created forms.</td></tr>
<tr><td>Detailed 360 Report Permission Control</td><td>Use Form XML
Enable 360 Detailed Report Permission for:
Process Owner:
Employee:
Users With Detailed Reports Privilege:
Manager of Employee's Manager:
Manager:
HR Rep. :
Approvers:</td></tr>
</table>

Setting	Description
	Refers to who will have the Detailed 360 Report link on the 360 form. If someone with permission to access the report link sends you the completed 360, you "inherit" that person's permission to access the report link.
Hide Detailed 360 Report link unless participants complete their forms.	
Disable Detailed 360 Report button in routing bar	
Hide the 'decline to participate' button on the 360 form for...	Hides the Decline to Participate button from the specified role. The participant choices are: • Process Owner - The last person to modify the form before it's distributed to others for evaluation. • Manager/HR The manager or the HR representative of the subject of the form. • Employee The person who is the subject of the 360 evaluation. • Approvers Everyone who contributed to, or modified, the content of the form before it was distributed for evaluation. • All raters - Tip Use this option if you want to let users choose whether they want to
Enable Add New Participants after 360 Evaluation starts for:	You can decide which roles are allowed to add more participants during the evaluation phase. This feature gives you the ability to add new participants to a 360 after the evaluation has started. It does not enable you to add participants to a 360 that has been completed by all participants. The available roles that can be granted permission are: Process Owner, Manager/HR, Employee, Approvers
Enable Send Back for	When enabled any of the selected roles can send the form back.
Enable Send Reminder Email for:	When enabled the selected roles can send the reminder emails to participants.
Enable Remove Participants after 360 Evaluation starts for:	Defines who will have permission to remove participants from the form.
Enable Gap Analysis View from Detailed 360 Report	Allows users to see the Gap Analysis view of the Detailed 360 report. If you select this option, users will see a Gap Analysis View button in the Detailed 360 report.
Enable Rank View from Detailed 360 Report	Allows users to see the Rank view of the Detailed 360 report. If you select this option, users will see a Rank View button in the Detailed 360 report.
Show Display Options in Graphical Summary View	Specifies which sections users see by default in the Graphical Summary view of the Detailed 360 report. If this option is selected, users will only see the selected sections by default, but will be able to select any other available sections as well. This option applies only if the Show

Setting	Description
	Display Options in Graphical Summary View is selected. This change applies to existing forms as well as newly created forms.
Calculate the item ratings by sub-item ratings in Detailed 360 Report	
Display the ratings in Detailed 360 Report with the decimal places which are set in form template	
Display 360 graph axis rating labels	
Enable enhanced Detailed 360 Report anonymity	Hides categories in the comments section of the Detailed 360 report
Hide the email sender for 360 Document Complete Notification and 360 Document Reject Notification. (Only applicable for Anonymous 360).	This option lets admins configure sender options for the 360 Complete document to hide the From field so that the manager cannot see the name of the sender. The email text can also be edited.
Show on-form workflow options as a pulldown list	Displays the routing actions the user can take in a dropdown menu as shown in the following graphic. If this option is not selected, the routing actions are shown as buttons as shown in the following graphic. This change applies to existing forms as well as newly created forms.
Display Step Start Date	Displays the start date of the step, if specified. The start date is shown above the routing map in the form. You specify the start date for the step in the Routing Map. For more information, click here. This change applies to existing forms as well as newly created forms.
Enable form title editability in Form info page (V10)	Allows the user to edit the title of the form while working in the Form Information page.
Enable form title editability in Form (V10)	Allows the user to edit the title of the form while working in the form.
Hide manager's own documents in Manager Dashboard	Specifies that the manager's own forms are not shown in the Manager Dashboard. For information about the Manager Dashboard, click here.
Enable Word XML Export	Allows users to export the form in XML format.
Enable 360 Add External Participants section	Recommended when external participants are part of your process.

Setting	Description
Disallow further invitations when a user has already been invited to rate forms. (The option will be regarded as disabled if the maximum number is set zero.)	
Hide the Show Assignment button.	No longer allows the form's originator to select sections that participants can rate. If you select this option, all participants will have to provide ratings for all sections.
Only create for users who don't have an existing form with an End Date between...and...	Allows you to create the form only for employees who haven't received this form already, for example newly hired employees or employees who are new to the system. If you select this option, specify the timeframe in the mm/dd/yyyy format. For example, if you specify 01/31/2015 and 2/28/2015, the users who received this form with the End Date between 1/31/2015 and 02/28/2015 will not receive the form.
Show digital signatures in Document Print Preview	Specifies that the signer's name is shown on the printed copy of the form as well as their role and the date when the user signed the form. If you don't select this option, only the signer's role and date when the user signed the form is shown.
Hide the link to the detailed 360 report in the En Route and Completed folders until all users have completed the 360	Prevents users from viewing the Detailed 360 report until all participants have completed the form. Note We recommend selecting this option. Otherwise, users will be able to view the Detailed 360 report at any time, even before all participants have provided their ratings. In this case, the report might show inaccurate results. This change applies to existing forms as well as newly created forms.
Disable Due Date Validation	Specifies that SAP SuccessFactors doesn't check whether the Due Date of the form is valid. For example, to be valid, the form's Due Date must be later then its End Date and Start Date.
Disallow users from changing the Start Date	Prevents employees who can create forms from changing the start date, end date, or due date of the form. If this option is selected, the Start Date specified in the form template will always be used, users won't be able to change this date when creating the form. This change applies to existing forms as well as newly created forms. Displays the start date of the step, if specified. The start date is shown above the routing map in the form. You specify the start date for the step in the Routing Map.
Disallow users from changing the End Date	Prevents employees who can create forms from changing the start date, end date, or due date of the form. If this option is selected, the Start Date specified in the form template will always be used, users won't be able to change this date when creating the form. This change applies to existing forms as well as newly created forms.
Disallow users from changing the Due Date	Disallow users from changing the Due Date Prevents employees who can create forms from changing the due date of the form. If this option is selected, the Due Date specified in the form template will always be used, users won't be able to change this date when creating the form. This change applies to existing forms as well as newly created forms.
Enable form routing to previous step	Recommended. Greatly improves workflow options allowing a person to send the form back when data is missing or extra information is desired.

Setting	Description
Enable Progress Meter	Enables the Progress Meter, which shows the approximate amount of time it will take to complete a form.

Prevent forms from being created with overlapping date ranges (this applies to all templates with this configuration enabled)	Configuration that checks that a user is not able to create a form that has a form start/end date range that overlaps another form. For example: I create one form with dates of Jan. 1, 2010 - April 15, 2010. I try to create another form with dates of April 1, 2010 - July 2, 2010. System will not allow me to create this form.
	• Checks forms in all stages (Modification, Evaluation, Signature, Completed) other than Deleted.
	• Validation applies to:
	  ◦ Create New Form UI wizard from the Performance tab.
	  ◦ Mass Create Form Instance from Admin
	  ◦ Schedule Mass Form Creation from Admin
	• Validation is done against all form template types with this option enabled, for example, enable the option on 2 templates, the system will validate that only one form, regardless of which template of the two it's from can exist in one date range.
	• Feature applies to both 360 and PM form template types.

Enforce permissioning for Detailed Document Search & Archive & Print Reporting.	
Define the PDF file name format:	

Parent topic: Configuring 360 Templates Using Admin Center [page 50]

Related Information

Manage Templates Tool [page 50]
General Settings [page 52]

2.3 Permissions

You can configure permissions in form templates to determine how users work on 360 forms.

Section Permissions [page 66]
You can use section permissions to determine whether users can view or modify a specific section in a form.

[Field Permissions [page 67]](#)
You can use field permissions to control whether users can view or modify a specific field of a 360 form.

[Drilldown Permissions [page 68]](#)
You can use drilldown permission to determine who can view the evaluation details from raters in the Summary View.

[Rater ID Permissions [page 69]](#)
You can work with implementation partners to define who can see the rater identities along with the routing step using `rater-id-permission` in Provisioning.

2.3.1 Section Permissions

You can use section permissions to determine whether users can view or modify a specific section in a form.

By default, section permissions are "enabled" for all users and all sections. You can configure section permissions 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.

Type of Access

- **enabled**: users can see the section
- **disabled**: user can see the section with read only on fields
- **hidden**: user can't see the section.

XML Example: Making a section "enabled" only for HR and Manager

In the example below, only the HR and manager can access and modify the section.

```
<section-permission type="hidden">
      <role-name>*</role-name>
      <route-step stepid="*"/>
    </section-permission>
    <section-permission type="enabled">
      <role-name>EM</role-name>
      <role-name>EH</role-name>
      <route-step stepid="*"/>
    </section-permission>
```

> i Note
>
> No role-name (*) means all roles, and no route-step (stepid = "*") means all steps.

Parent topic: Permissions [page 65]

Related Information

Field Permissions [page 67]
Drilldown Permissions [page 68]
Rater ID Permissions [page 69]

2.3.2 Field Permissions

You can use field permissions to control whether users can view or modify a specific field of a 360 form.

By default, field permissions are "write" for all users and all fields. You can configure field permissions 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.

Type of Access

- **none**: User can't see the fields.
- **read**: User can read the fields.
- **write**: User can read and write the fields.

Fields That Can Be Permitted

The table below displays the fields that support field permissions:

Fields	Descriptions
item-rating	Managers' ratings
subject-item-rating	Subjects' ratings
item-weight	Goal or competency weights
manual-overall-rating	Manual overall rating in the summary section

Fields	Descriptions
calculated-overall-rating	Calculated overall rating in the summary section **Note** This field isn't editable. If you set the field permission as Write, it's interpreted as Read.
review-period	The start, end, and due dates in the review information section
tgm-fields	It affects goal category, goal weight link, goal state, goal metric, goal details, and other details

XML Examples: Making the Review Period Read-Only

The following example shows how to make the review dates read-only to all users.

```
<field-permission type="read">
         <field refid="review-period"/>
</field-permission>
```

Parent topic: Permissions [page 65]

Related Information

Section Permissions [page 66]
Drilldown Permissions [page 68]
Rater ID Permissions [page 69]

2.3.3 Drilldown Permissions

You can use drilldown permission to determine who can view the evaluation details from raters in the Summary View.

To grant drilldown permission, go to *Admin Center* > *Form Template Settings* and choose a template. Then select *Enable 360 Drilldown Permission for:* for the following available roles:

- **Process Owner**: the last Modify step user
- **Employee**: the form subject
- **Users With Detailed Reports Privilege**: any user who belongs to a user group that is granted with the Detailed Reports Privilege
- **Manager**: the manager of the form subject

- **HR**: the HR representative of the form subject
- **Approvers:**: any user who modified the form before it is sent for evaluation

Once the selected users are granted the drilldown permission, they can navigate to *Summary View* > *Evaluation Summary* on a 360 form, and click a rater's name to view the form that the rater completed.

> **Note**
>
> The drilldown permission only allows users to view the form completed by raters, and what users can see on the form is determined by form specific permissions such as section permissions and field permissions.

Parent topic: Permissions [page 65]

Related Information

Section Permissions [page 66]
Field Permissions [page 67]
Rater ID Permissions [page 69]

2.3.4 Rater ID Permissions

You can work with implementation partners to define who can see the rater identities along with the routing step using `rater-id-permission` in Provisioning.

> **Note**
>
> Please remember that *<rater-id-permission>* is only applicable to Open 360s. Do not try it with Anonymous 360s.

> **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.

The *<rater-id-permission>* provides a great deal of flexibility to set anonymity based on who (User Roles - *<role-name>*) is viewing the 360, in which stage of the 360 (Routing Step - *<route-step>*), and to what target group(s) of raters (Rater Category - *<rater-category>*) the anonymity is to be applied.

This only makes sense in an *Open* 360 in which a customer can choose to hide rater identities in certain 360 routing steps, including 360 Evaluation Stage and Completed Stage.

For 360 Evaluation Stage, use *360EvaluationStage* stepid and for Completed Stage, use *CompletedStage* stepid.

Type of access

- **none**: users cannot see the rater identities.
- **enabled**: users can see the rater identities.

Parent topic: Permissions [page 65]

Related Information

Section Permissions [page 66]
Field Permissions [page 67]
Drilldown Permissions [page 68]

2.3.4.1 Example: Making a 360 Anonymous for Some and Named for Others

You can configure a 360 to have varying levels of anonymity. For example, a manager sees the 360 as named and the employee sees the 360 as anonymous. It is also possible for the employee to see responses from their manager or peers as named, but can only see responses from their direct reports as anonymous.

As of now, it is not possible to grant someone with the ability to remove participants comments. Even if you can see who said what, you cannot remove the comments. Also, configuration of levels of anonymity must be done at the time the form is created. This means, before the 360 review process, you need to know who you want to grant access to see named participants. Once the form is created and the process is started, you cannot change that.

> **i Note**
>
> By selecting *Show Participants in Status Summary (Applicable to Anonymous 360's only)* in *Admin Center* > *Form Template Settings*, process owners can view basic information about the participants on the Rater List of an anonymous 360 Reviews form in the Evaluation, Signature, and Completed stages.

In Provisioning, access your 360 form template and ensure that *Participant names on 360* option is selected.

> **→ 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.

Add the following XML example in the meta section after

```
<meta-cat hidden-threshold="0" min-count="0" max-count="2147483647" ><![CDATA[Self]]></
meta-cat>
```

Example

The following example hides all rater identities for all users in all stages, that is, every rater is shown as Anonymous and in effect it turns an Open 360 to an Anonymous 360:

```
<rater-id-permission type="none">
<rater-category>*</rater-category>
<role-name>*</role-name>
<route-step stepid="*"/>
</rater-id-permission>
```

OR

```
<rater-id-permission type="none">
<role-name>*</role-name>
<route-step stepid="*"/>
</rater-id-permission>
```

Example

To hide all rater identities for Employee in all stages, that is, to the Employee, all raters will be shown as Anonymous:

```
<rater-id-permission type="none">
<rater-category>*</rater-category>
<role-name>E</role-name>
<route-step stepid="*"/>
</rater-id-permission>
```

OR

```
<rater-id-permission type="none">
<role-name>E</role-name>
<route-step stepid="*"/>
</rater-id-permission>
```

Example

To hide all rater identities for all users in 360 Evaluation Stage:

```
<rater-id-permission type="none">
<rater-category>*</rater-category>
<role-name>*</role-name>
<route-step stepid="360EvaluationStage"/>
</rater-id-permission>
```

OR

```
<rater-id-permission type="none">
<role-name>*</role-name>
<route-step stepid="360EvaluationStage"/>
</rater-id-permission>
```

Example

To hide all rater identities for all users in 360 Evaluation Stage, except the Manager, that is, when the Manager opens the 360, all the names of the raters are visible, while everyone else sees as Anonymous:

```
<rater-id-permission type="none">
<rater-category>*</rater-category>
<role-name>*</role-name>
<route-step stepid="360EvaluationStage"/>
</rater-id-permission>
<rater-id-permission type="enabled">
<rater-category>*</rater-category>
<role-name>EM</role-name>
<route-step stepid="360EvaluationStage"/>
</rater-id-permission>
```

Specific Example

Add the following snippet in meta section of 360.

```
<meta-cat hidden-threshold="0" min-count="0" max-count="2147483647" ><!
[CDATA[Self]]></meta-cat>
<rater-id-permission type="none">
<rater-category>*</rater-category>
<role-name>*</role-name>
<route-step stepid="*"/>
</rater-id-permission>
<rater-id-permission type="enabled">
<rater-category>*</rater-category>
<role-name>EM</role-name>
<route-step stepid="360EvaluationStage"/>
<route-step stepid="CompletedStage"/>
</rater-id-permission>
<meta-360-rollup-category-name><![CDATA[Upward]]></meta-360-rollup-category-name>
```

As a result of this, when the 360 is in the evaluation and completion stage, the manager sees participant names in the evaluation summary.

When the 360 is in the evaluation or completion stage, the employee (other than the employee with a completed copy) cannot see participant names in the evaluation summary.

2.4 EZ Rater

EZ Rater allows managers to easily compare employee self-ratings with manager ratings.

You can set up EZ Rater for goal sections and competency sections. In the EZ Rater mode, competency and goal items are displayed in a compact list view, so users can easily rate them at one time. It shows employee self-ratings and manager ratings in parallel and provides a gap analysis chart. If an employee self-rating is higher than a manager rating, the gap is highlighted in red in the chart; and if a manager rating is higher than an employee self-rating, the gap is highlighted in green in the chart.

2.4.1 Enabling EZ Rater

Enable EZ Rater in an XML form template so users can easily rate items at one time.

Procedure

1. In a goal section or competency section, set the `sect-mode` attribute of to `EZ-Rater`.
2. Set the `ez-rater-expand-all` accordingly. `true` or `false`.
    - If it's set to `true`, all goal details or competency details are expanded by default.
    - If it's set to `false`, all details are collapsed by default.

    > **i Note**
    >
    > In 360 Reviews - SAP Fiori Version, the `ez-rater-expand-all` attribute is only applicable to the goal section.

    This example shows how EZ Rater is used in a competency section.

    ```
    <competency-sect mgt-only="false" index="7" cmt-opt="0" split-
    cmt="false" show-calculated-section-rating="true" ez-rater-expand-all="false"
    sect-mode="EZ-Rater" in-objcomp-summ-overall-rating="false" in-objcomp-
    summ-display="false" lock-item-weights="false" if-no-ratings-then-ignore-
    section="true" no-group="true" in-overall-rating="true" in-summ-display="true"
    rating-opt="0" summ-opt="0" no-weight="true" no-rate="false" use-jobcode="true"
    configurable="true" hide-waca="false" lock-behavior-content="false" max-
    competencies-allowed="2147483647" min-competencies-required="-2147483648"
    behavior-weighted="false" behavior-expected-rating-format="0" show-behavior-
    expected-rating="false" comp-expected-rating-format="0" show-comp-proficiency-
    level="false" show-comp-expected-rating="false" use-behavior="false" behavior-
    mode-opt="0" behavior-cmt-opt="1" behavior-rating-opt="0" suppress-item-
    comments="0" category-filter-opt="no-filter" use-core-comp="false">
    <comp-sect-name>
    ```
3. Save your changes.

Results

For the form that is configured with the EZ Rater feature, competency or goal items are displayed in a compact list view.

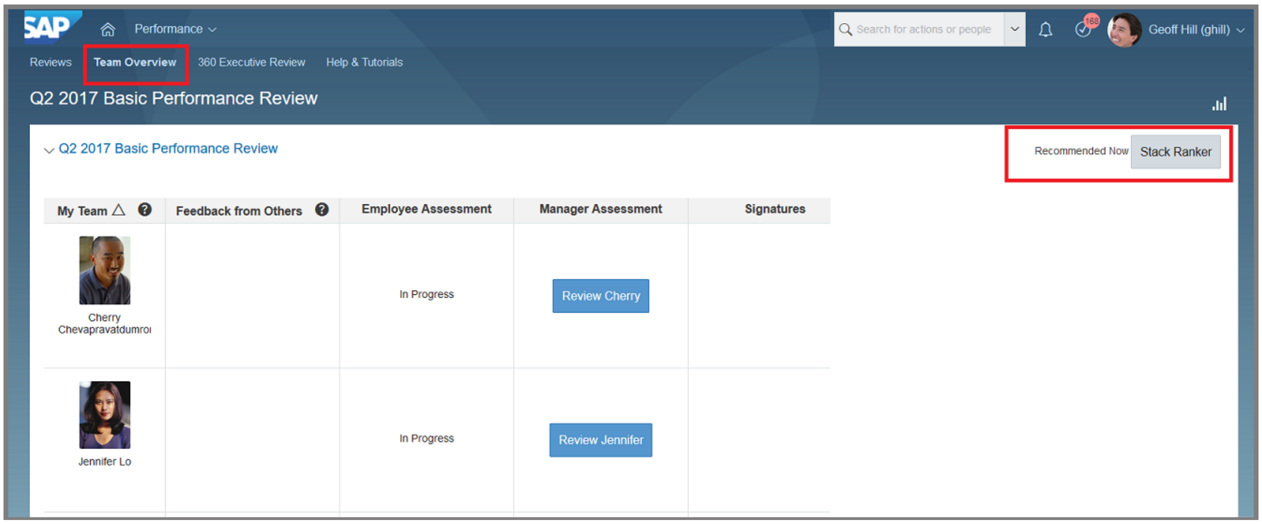
2.5 Stack Ranker

Stack Ranker allows managers to quickly review the competency ratings for their direct reports and to visualize how the employees compare with, or stack up against, one another.

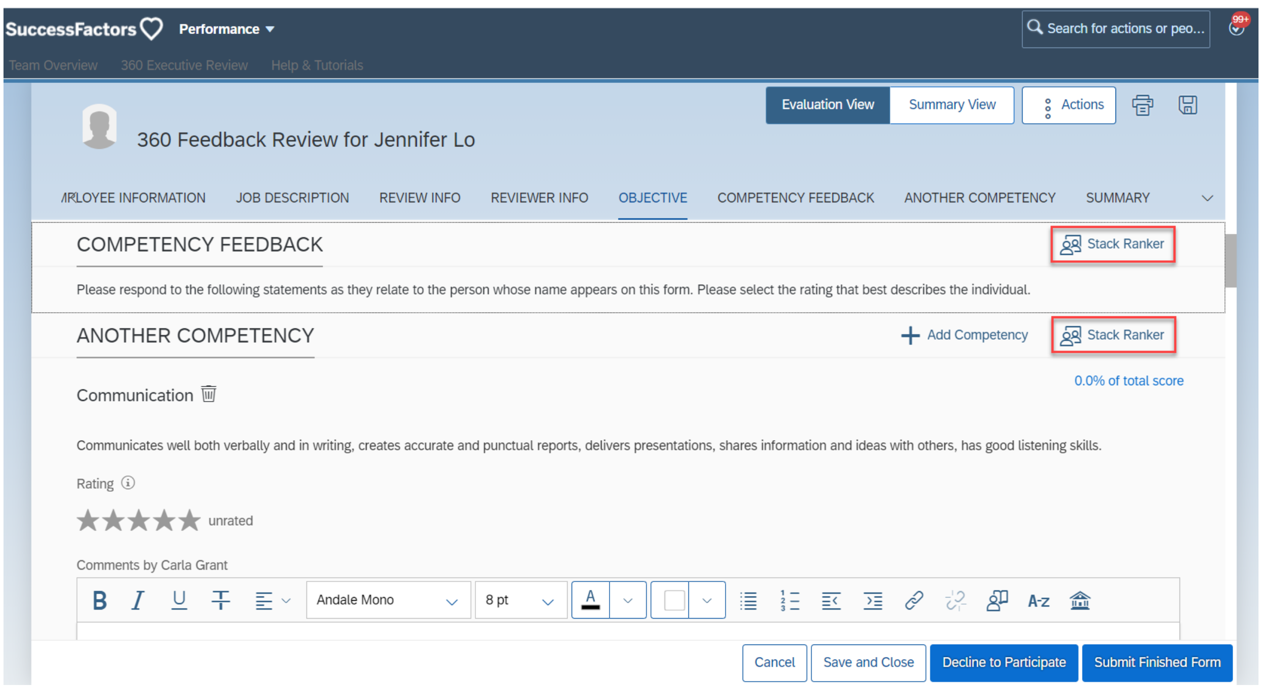
If direct reports have in-progress forms based on the same form template, managers can review their competency ratings at one time and quickly identify top and low performers.

Accessing Stack Ranker

For Performance Management forms, managers can access Stack Ranker in Team Overview, as shown below.

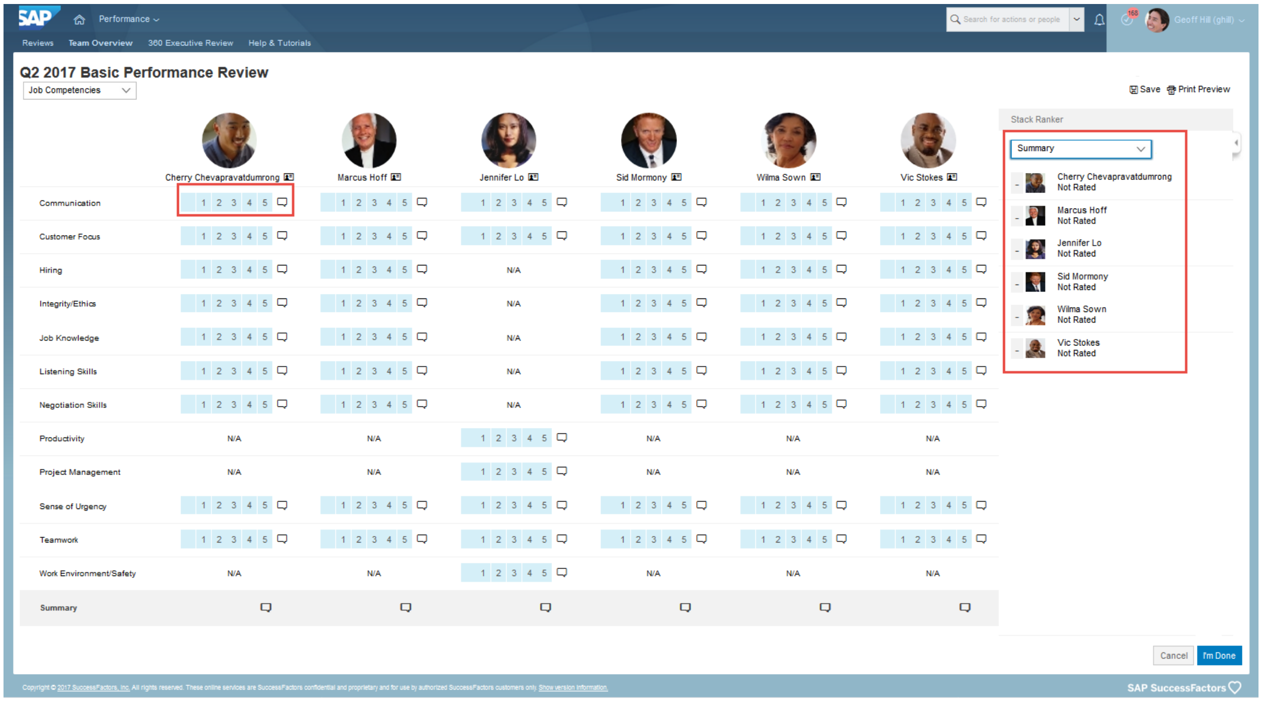


For 360 Reviews forms, managers can access Stack Ranker in the Competency section, as shown below.



Features

In Stack Ranker, a list of employees and their competency ratings are displayed. You can use the features highlighted in the screenshot below.



- Select a value on the rating scale to give or change a rating.
- Choose 🗨 *(comment)* to add comments on reasons for the change. You can enter up to 4,000 characters in a comment field.
- View employees' ranking in the right panel of the page. The ranking is updated simultaneously with the ratings you give. You can use the dropdown list to view the ranking of the overall competency rating or a specific competency rating.

Rating Fields in Stack Ranker

Stack Ranker supports three types of rating fields: horizontal boxes with rating values, horizontal boxes without rating values, and dropdown list. For the horizontal boxes, rating descriptions are shown on mouseover.

The type of rating fields used in Stack Ranker depends on the rating scale and form template configurations.

- If a rating scale has more than seven rating levels, the dropdown list is used.
- If rating values are not integers from 0 to 9, the dropdown list is used.

2.5.1 Enabling Stack Ranker for 360 Reviews

Stack Ranker for 360 Reviews can only be enabled in Provisioning.

Context

After you enable this feature, managers use the feature, in which mode employees stack up against one another, to easily review and change the competency ratings and comment on the competencies.

Procedure

1. Go to *Provisioning* > *Company Settings* > *Team Rater for 360*.

   > → 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. Go to *Provisioning* > *Form Template Administration*.
3. Choose the target 360 Reviews form template.
4. Add `<my-team-rater/>` to the `<fm-meta>` section.
5. Make sure `use-behavior="false"`.
6. Save your changes.

Results

The Stack Ranker button appears in the Competency section on the configured 360 Reviews forms.

2.5.2 Customizing Text for Stack Ranker

You can replace the Stack Ranker label with a customized text in English, Spanish, and Canadian French.

Procedure

1. In Admin Center, go to *Text Replacement*.

2. Search for Stack Ranker in the *Default Text* column.
3. In the *Replace With Text* field, enter the text with which you want to replace Stack Ranker.
4. Choose *Save*.

   Stack Ranker in the system is replaced with your customized text.

2.5.3 Using Stack Ranker in 360 Reviews: Recommendations and Limitations

Learn about the recommendations for and limitations of using Stack Ranker in 360 Reviews.

Recommendations

Competency Type

Though Stack Ranker supports job-specific competencies and custom competencies, we recommend that you use custom competencies, so that all direct reports have the same number of competencies to be reviewed.

Competency Weight

Though competency weights can be included in the rating calculation, the weights are not shown in Stack Ranker and managers may find it difficult to understand how the ratings are added up. Therefore, we do not recommend that you use the weight function in Stack Ranker.

Rich Text Editor (RTE)

Plain texts may not work properly for comments, so we recommend that you enable using RTE.

Overall Competency Rating

Unless you want the overall competency rating to appear in People Profile, do not include a summary section.

Limitations

There are a few limitations in Stack Ranker.

- If managers are involved in performance reviews with different route maps, or there is a manger change, they may see people who are not their direct reports in Stack Ranker.
- Forms can't be mass routed to the next step.
- Rating behaviors is not supported.
- Comments for competency items or sections can't be printed out.

2.6 Rater Category Rollup

If you have set a threshold number of raters in some categories, but that threshold is not met, you can configure rater categories to rollup via Provisioning. Therefore, the rater responses from these categories can be combined with those from other categories, and show up in the Detailed 360 Report.

> → 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.

Some definitions and values about rollup are described on this page.

Rollup and drop

The two options can be selected from the *Unmet threshold action* dropdown.

- **Rollup**: combine categories if the minimum threshold is not met.
- **Drop**: drop or do not report the data if the minimum threshold is not met.

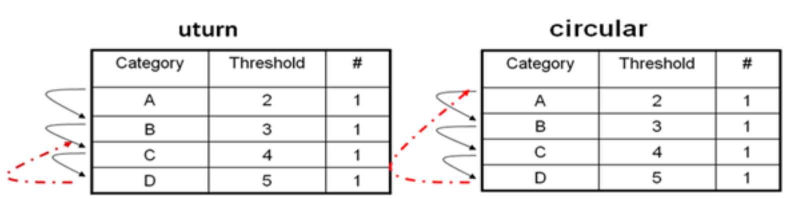
> i Note
>
> The system only supports one of them. You cannot select rollup, and then expect categories to drop if minimum thresholds are not met.

Rollup type

There are two types of rollup.

- [Recommended] **Circular**: the data rolls to the next category group that is listed in `meta-360-rollup-category-name`.
- **Uturn**: the data rolls to the next category group that is listed in the meta-360-rollup-category-name, and if the threshold is not met, it rolls back-up the list.

  > ⚠ Caution
  >
  > This feature will probably only be used by one client for which it was implemented.



Attributes of rater categories

The example code is used to explain the attributes of rater categories in xml.

```
<fm-meta>
  <meta-form-id>-1</meta-form-id>
  <meta-rated>true</meta-rated>
  <meta-rating>0.0</meta-rating>
  <meta-scale>0.0</meta-scale>
  <meta-grp-label><![CDATA[Group]]></meta-grp-label>
  <meta-cat hidden-threshold="2" min-count="0" max-count="50" cat-weight="20.0"
competency-filter="48898"><![CDATA[Direct Report]]></meta-cat>
  <meta-cat hidden-threshold="2" min-count="0" max-count="50" cat-weight="20.0"
competency-filter="48890"><![CDATA[Peer]]></meta-cat>
  <meta-cat hidden-threshold="1" min-count="1" max-count="50" cat-weight="30.0"
competency-filter="48898,48890"><![CDATA[Manager]]></meta-cat>
  <meta-cat hidden-threshold="1" min-count="1" max-count="50" cat-weight="15.0"><!
[CDATA[Self]]></meta-cat>
  <meta-cat hidden-threshold="2" min-count="1" max-count="50" cat-weight="15.0"><!
[CDATA[External]]></meta-cat>
  <meta-360-rollup-category-name><![CDATA[Direct Report]]></meta-360-rollup-
category-name>
  <meta-360-rollup-category-name><![CDATA[Peer]]></meta-360-rollup-category-name>
  <meta-360-rollup-category-name><![CDATA[External]]></meta-360-rollup-category-
name>
  <fm-sect-scale show-value="true">
    <scale-source>1</scale-source>
    <scale-id><![CDATA[Review Scale]]></scale-id>
    <scale-type><![CDATA[DROPDOWN]]></scale-type>
  </fm-sect-scale>
  <meta-item-weight-floor-ceiling-option>warning</meta-item-weight-floor-ceiling-
option>
</fm-meta>
```

- **hidden-threshold**: used to hide raters if the total number of raters in the form is less than the threshold defined in the `hidden-threshold` attribute. If the hidden threshold is not met, the data for that category will not be reported. You can specify rollup to have the aggregate combine with another category.

  > **Note**
  >
  > If category thresholds are set but not met, and no rollup is specified, then the data for each of the categories will be dropped and cannot be viewed in the detailed 360 report.

- **min-count and max-count**: used to limit the number of raters per category.
- **cat-weight**: used to define weights to rater categories, so that ratings from different rater categories can be weighted in calculation.
- **meta-360-rollup-category-name**: defines order of roll up when the hidden threshold is not met.
  For example, the hidden threshold for direct report is **2**, and if only one **direct report** completes the 360 form, the responses from that rater will be rolled up together with the responses from the raters in the **Peer** category.
- **competency-filter**: used to control what competencies users from different participant categories can view and rate. By specifying this attribute, you can achieve the following:
  - After the form is launched, in the *Show Assignments* dialog, participants belonging to the categories allowed to rate a competency are automatically selected for that competency. But users can still select for a participant any competencies that weren't initially included in the `competency-filter` defined for the participant's category.
  - If a participant's category is changed in the Modify stage, the participant's competency assignment will be automatically updated to comply with the new category's `competency-filter`.

- If a participant is added in the Evaluation stage, the participant's competency assignment will follow the `competency-filter` defined for the participant's category.
- If a competency is added to the form, filters including or not including this competency will apply to related competency assignments.

Configuring Rollup for a 360 Reviews Form [page 80]
This example will show you how to configure rollup for a 360 form.

2.6.1 Configuring Rollup for a 360 Reviews Form

This example will show you how to configure rollup for a 360 form.

Context

The following categories have been set for a given customer in a 360 form:

- Self
- Manager
- Direct Report
- Peers
- External

The customer has set a threshold number of raters from the above categories. If no threshold is met, and no rollup is specified, the data for the categories will be dropped, and cannot be viewed in the detailed 360 report. Rollup can be configured 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. Open a form template in Provisioning.
2. Select *Rollup* from the *Unmet threshold action*dropdown.
3. [Recommended] Select *Circular* from the *Rating rollup type (only applied to Rollup Action)* dropdown.
4. Enable *Participant names on 360*, and then save.
5. Add the following code example to the `<fm-meta>` section of the form template.

```
<fm-meta>
  <meta-form-id>-1</meta-form-id>
  <meta-rated>true</meta-rated>
  <meta-rating>0.0</meta-rating>
  <meta-scale>0.0</meta-scale>
  <meta-grp-label><![CDATA[Group]]></meta-grp-label>
```

```
  <meta-cat hidden-threshold="2" min-count="0" max-count="50" ><![CDATA[Direct
Report]]></meta-cat>
  <meta-cat hidden-threshold="2" min-count="0" max-count="50" ><![CDATA[Peer]]></
meta-cat>
  <meta-cat hidden-threshold="1" min-count="1" max-count="50" ><!
[CDATA[Manager]]></meta-cat>
  <meta-cat hidden-threshold="1" min-count="1" max-count="50" ><![CDATA[Self]]></
meta-cat>
  <meta-cat hidden-threshold="2" min-count="1" max-count="50" ><!
[CDATA[External]]></meta-cat>
  <meta-360-rollup-category-name><![CDATA[Direct Report]]></meta-360-rollup-
category-name>
  <meta-360-rollup-category-name><![CDATA[Peer]]></meta-360-rollup-category-name>
  <meta-360-rollup-category-name><![CDATA[External]]></meta-360-rollup-category-
name>
  <fm-sect-scale show-value="true">
    <scale-source>1</scale-source>
    <scale-id><![CDATA[Review Scale]]></scale-id>
    <scale-type><![CDATA[DROPDOWN]]></scale-type>
  </fm-sect-scale>
  <meta-item-weight-floor-ceiling-option>warning</meta-item-weight-floor-ceiling-
option>
</fm-meta>
```

In the code, the `meta-360-rollup-category-name` attribute defines the order of rollup, when the hidden threshold **2** for Direct Report, Peer and External is not met. Below are some examples of rollup order.

- If only one Direct Report completes the 360 form, his or her responses will be combined with the responses in the Peer category.
- If only one Peer completes the 360 form, his or her responses will be combined with the responses in the External category.
- If only one External completes the 360 form, his or her responses will be combined with the responses in the Direct Report category.
- If one Direct Report, one External and two Peers complete the 360 form, then according to the order of rollup in the `meta-360-rollup-category-name`, all the three categories will be combined into one category in the detailed 360 report.

6. Log in to the application, and then navigate to *Admin Center* > *Form Template Settings*, and select the 360 form that you have configured in Provisioning.
7. Enable *Apply Threshold On: Participant Level*, and save.

Result: You have successfully configured rollup for the 360 form.

Parent topic: Rater Category Rollup [page 78]

2.7 Calibration Mode

Calibration mode for a 360 allows the rater to rate multiple subjects at the same time in a single assessment.

> **i Note**
>
> The competencies that are rated should be the same for all subjects.

Need to Know

- Competency Section is the only section that displays in calibration mode (form intro section disappears - does not display)
- Open ended questions are not supported.
- Drop down rating scales are only supported.
- Item level comments are hardwired and cannot be altered regardless of the cmt-opt indicated in the form xml.
- Calibration Mode only works if there is one competency section in the form. If there is more than one competency section, sections are not displayed to the raters.

2.7.1 Configuring Calibration

In provisioning for your form template, add the following code (code in blue) to the competency section of the 360:

```
<blind-spot-threshold>0.5</blind-spot-threshold>
    <required-fields>
        <role-name>*</role-name>
        <field refid="item-rating" min-value="-1.0" max-value="-1.0"/>
        <route-step stepid="*"/>
        <send-action sendid="complete_360"/>
    </required-fields>
<calibration-mode/>
```

→ 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.

In Admin Center, go to the Form Template and ensure *Enable Calibration Mode* is enabled.

2.7.2 Sample Multi-Rater Form

This is a sample Multi-Rater form with the<calibration-mode/>code and 3 hard coded competencies from the SAP SuccessFactors Competency library:

How does it work

1. Create 360's for multiple subjects and be sure that you add the same demo user as a participant in all 360's (in other words, if you are creating 360's as cgrant for all team members, be sure to include cgrant as one of the participants for all subjects).
2. Send the 360's to evaluation mode.
3. As the rater, you will receive each 360 in your inbox.
4. Click on any one of the 360's in your inbox.

You can select the subjects you want to rate and then click the Rate button in the lower right. You will then be brought into a view like below where you can rate each of the subjects and provide comments all on a single screen.

Once you complete the rating for all subjects, all of the forms will be completed and moved out of your inbox.

2.8 Anonymous View for Named 360s

Anonymous View allows users to select if they want to display the Detailed 360 Report with names or without names.

The primary use of this feature is when the report is enabled for Managers, who then print the reports to give to employees and want to print an anonymous view.

> **Note**
>
> This feature is only applicable to named 360s. The 360 must be named, but you can hide the information from displaying.

To enable the anonymous view:

1. Create a Named 360.
2. Check the access permissions for the Detailed 360 Report. Go to *Admin* > *Form Templates* and select the correct 360 form template and check *Enable 360 Detailed Report Permission for*.
3. Check *Enable Anonymous 360 Detailed Report View*.
4. Open the Detailed 360 report from the Summary view after the 360 report is completed.
5. When viewing the report, you can select if you want the named view or the anonymous view.

2.9 E-mail Notifications for 360 Reviews

This topic discusses different e-mail notifications for 360 Reviews and common tokens used in the e-mail body.

E-mail Notifications for 360 Reviews

You can configure e-mail notifications so that the target recipients can receive notifications through e-mails when the related action is finished. The following table discusses different e-mail notifications for 360 Reviews.

For information on how to configure e-mail notifications, refer to Configuring e-mail Notifications

Notification	Description
Document Creation Notification	Document Creation Notification is sent to the first step owner in the route map when the form is created.
Document Deletion Notification	Document Deletion Notification is sent to a user when the form is deleted. You can choose the e-mail recipients on the *E-Mail Notification Templates*.
Document Completed Notification	Document Completed Notification is sent when the form is completed. You can choose the e-mail recipients on the *E-Mail Notification Templates*.

Notification	Description
Document Due Notification	Document Due Notification is sent to users when the form in their Inbox is approaching the due date.
Step Due Notification	Step Due Notification is sent to users when the form in their Inbox is approaching the due date for a particular step in the route map. **i Note** When the notification is sent depends on the number of days (for example, 7) that is specified in *Default Due Notification Date (in days)* on the *Form Template Settings* page and **Step Due Date** . In the example, the step owner will receive the Step Due Notification seven days before the step due date.
360 Document Approval Notification	360 Document Approval Notification is sent to users who are being requested to provide approval for rater selection.
360 Document Evaluation Notification	360 Document Evaluation Notification is sent to users who are being requested to complete the evaluation.
360 Document Evaluation Notification for External Participant	360 Document Evaluation Notification for External Participant is sent to external users who are being requested to complete the evaluation.
360 Document Kickoff Notification	360 Document Kickoff Notification is sent to a 360 form subject, informing him or her of the final approved selection of feedback team members, when a 360 form is sent to the Evaluation Stage.
360 Document Complete Notification	360 Document Completed Notification is sent to a 360 process owner, informing him or her that a 360 participant has completed the form.
360 Document Reject Notification	360 Document Reject Notification is sent to a 360 process owner, informing him or her a 360 participant has rejected the form.
360 Document Send Back Notification	360 Document Send Back Notification is sent to a 360 rater, informing him or her that a form is sent back to their Inbox for re-evaluation.

Tokens used in e-mail notification

In the e-mail body, you might see the following tokens which are used to populate data from the document into the text of 360 Reviews e-mail notification.

> → Tip
>
> If you want to modify the body text of a default email notification template, we recommend that you use only tokens that appear in that particular default template. Using other tokens might lead to those tokens being unresolved. For example, the [[DOC_DUE_DATE]] token might show as a plain text – "[[DOC_DUE_DATE]]", instead of any specific due date.

Token	Definition
[[SIGNATURE]]	Signature
[[DOC_TITLE]]	Title of document
[[SENDER]]	Sender of document
[[DOC_DUE_DATE]]	Due date of this document
[[REVIEW_END_ON]]	End date of this review
[[IS_WAS_DUE_ON]]	Due date of this document
[[IS_WAS_DUE_ON_LONG]]	Due date of this document The example of date format is November 20, 2018
[[DOC_COMMENT]]	Comment from sender to be included in e-mail In e-mail notifications such as Document Routing Notification and 360 Document Reject Notification, this token is configured by default. After users enable these notifications, they can enter comments in the *Email Notification Comments* box when routing forms. **Note** If [[DOC_COMMENT]] is removed from the E-mail Body, users cannot see the *Email Notification Comments* box when sending the form to next step.
[[NO_OF_DAYS]]	Number of days between the current date and due date
[[EMP_NAME]]	Subject's name
[[EMP_USER_ID]]	Subject's ID
[[EMP_PASSWORD]]	Subject's password
[[RECIPIENT_USERNAME]]	Recipient's username of this document
[[RECIPIENT_NAME]]	Recipient's full name of this document
[[DOC_COMPLETION_DATE]]	Date of document completion
[[DOC_LASTMODIFIED_DATE]]	Last modified date of the document
[[DOC_ACCESS_URL]]	Link of the document **Note** This token is not supported in the e-mail notifications for external users.

2.10 Autosave in 360 Reviews - SAP Fiori Version

Autosave can prevent accidental loss of user-entered data on 360 Reviews forms.

The autosave feature is useful in the following cases:

- When users are editing a 360 Reviews form, the system saves the form automatically after 30 seconds of inactivity. This works for views and sections on a form in all stages.
- Changes are saved immediately in the following scenarios:
  - When you open the links under the *Actions* menu, including *Open Detailed 360 Report*, *Spell check entire form* and *Legal scan entire form*.
  - When you print a form or save a form as PDF.
- When users are about to navigate away from a form with unsaved changes (for example, by accidentally clicking some UI control), they'll see a reminder message and the changes are automatically saved.
- When users leave a form there without saving changes, the changes are saved before the session timeout.

Users are always reminded by a message at the top of the form when there are unsaved changes. Users can choose to save the changes manually, allow them to be saved automatically, or discard them by choosing *Cancel* at the bottom.

2.11 Comments in 360 Reviews Forms

The comment function in a 360 Reviews form enables participants to give feedback on the employee.

Use

Participants can add an overall comment to a section and a comment to a rating in a 360 Reviews form.

> ⚠ Caution
>
> After participants have submitted the form with comments, they cannot edit or delete the comments anymore.

Features

The comment function in a 360 Reviews form includes the following key features:

- **Edits don't get lost**: The comments can be saved automatically by the system when participants stop typing and go inactive for over five seconds.

  > i Note
  >
  > The autosave function also applies to the custom text boxes.

- **Flexible text length**: The text length of a comment can be customized to ensure that participants enter effective content.
- **Custom comment labels**: The comment labels can be customized to distinguish the managers' comments from employees' comments.
- **Spell Check and Legal Scan**: The comment box supports the Spell Check and the Legal Scan functions to ensure the text quality.

Scope

You can add comments in the following areas of a 360 Reviews form:

- The Competency section
- The Goal section
- The Summary section
- The Signature section
- The Rating item

Visibility

The added comments have different levels of visibility during the whole process:

- In the Evaluation stage, the comments added by participants are invisible to other participants.
- In the Signature stage, the comments given by the employee and the manager are visible to each other.
- In the Completed stage, all the comments along with the commenters' names can be found in the *Detailed 360 Report*, which is available for the permitted participants.
  To include the comments in the report, you can enable the *Show comments* for the report. If you want to hide the commenters' names, you can choose the *Anonymous View* of the report. For details, see Anonymous View for Named 360s [page 83].

2.12 Integration of 360 Reviews with Career Development Planning

You can integrate the development goal plan with 360 Reviews and view the development goals in the detailed 360 report. You can similarly integrate Learning with 360 Reviews too.

Note the following:

- Allow users to access the subject's CDP plan to view or add development goals for the subject.
- There is no permissioning on this feature. If enabled, it will allow anyone who has access to the Detailed 360 Report to modify CDP goals for the subject.
- When the feature is enabled, the link will always use the default CDP plan

- You cannot specify which plan to use if there is more than one CDP plan in the company instance, other than by setting the default plan
- CDP Links will only be available for the Graphical Summary View and the Rank View. Gap Analysis, Hidden Strengths and Blind Spots Views do not offer this functionality.

> **Note**
>
> To use this feature you need to have created a valid CDP template created for the company instance, and set it as the default CDP plan. The plan must contain goals.

1. In the 360 form template, enable the option "embed-cdp-goals=true".

   > **Note**
   >
   > If forms have already been created, you will need to change this setting in the xml for each form.

2. Navigate to the summary view for the desired 360, then open the Detailed 360 Report. The Development Goals link is available from the *Graphical Summary View* and the *Rank View*
3. Click the *Development Goals* link. The Development Goals dialog box displays the development goals that currently exist for this person and this competency.
4. Click *Add Development Goal*, then, in the next dialog box, add or edit the goals.
5. Finally, click *Save* and then *Finish* to return to the 360 report.

> **Note**
>
> To integrate with Learning, both the logged-in user and the form subject must have learning access permission.
>
> To enable this option, in Provisioning, select *Form Template Administration* > *<the specific template>* then select *Enable Learning Integration.*
>
> > **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.
>
> When this option has been enabled, *Assign Learning* appears below each competency description on the form.

3 Routing 360 Reviews Forms

Main routing actions involved in the workflow for a 360 Reviews form that is determined by the route map associated.

When a 360 Reviews form is being routed, it can be routed through four stages: Modify stage, Evaluation stage, Signature stage, and Completed stage. In each phase, there are main routing actions guiding users through the whole process. In the Modify stage, roles defined in the route map can nominate raters, and send the form to next step. In the Evaluation stage, raters can evaluate the subjects and submit or recall a completed form, process owners can remind raters to give feedback, and roles with proper permission can continue to add additional raters. In the Signature stage, participants can sign the form, while permitted roles can reject it or send it back to a specific role for additional changes. In the Completed stage, participants can complete or decline the form.

3.1 Raters in 360 Reviews Forms

You can determine and modify internal and external raters on 360 Review forms, and send the forms for ratings.

Setting Up Default Raters [page 90]

Adding Participants in 360 Review Forms [page 91]
Once you've launched the forms, you can add or remove raters from the *Rater List* section.

Adding Participants in Evaluation Stage [page 92]
Process owners and permitted roles can add participants when a 360 Reviews form is in Evaluation stage.

Changing Participant Category [page 94]
You can change the participant category for a 360 form using *Admin Center* > *Change Participant Category*.

Removing Participants [page 95]
You can remove participants using *Modify Participants*. Once the participants are removed from the participant list, they won't receive notifications to approve the 360 Review forms.

Removing 360 Reviews Forms of Inactive Employees in Bulk [page 96]
You can bulk remove the 360 Reviews forms that are in the Evaluation stage from the inboxes of inactive employees.

Retaining Inactive Employee' 360 Evaluation Documents [page 97]
In the Form Template level, you can enable the option to avoid inactive users been removed for a particular template.

Specifying Minimum and Maximum Participant Numbers and Defining Warning and Error Messages [page 98]

External Raters [page 100]
In the Modify and the Evaluation stages, roles defined in a route map can add external raters in the system with Single Sign-On (SSO) enabled.

3.1.1 Setting Up Default Raters

What roles are supported currently for the default rater population:

The only roles supported currently in the system for the default rater population field are the following:

E, EM, EX, EP, EMM, EH, ED, EMD

How to set a default rater so that it appears automatically in a form:

To do this, you can either use the *Manage Templates* tool or edit the XML form template. To edit the XML file, add the following snippet for each category that you want to automatically populate in the Participant List when the form is created:

`<default-rater category="Direct Report"><![CDATA[ED]]></default-rater>`

How to set a default rater so they appear automatically in a form AND can't be removed:

```
<default-rater removable="false" category="Self"><![CDATA[E]]></default-rater>
</rater-config>
```

Here is an example of how both options look in the section:

```
</fm-sect-config>
<rater-config>
<date-column-format>MM/dd/yyyy</date-column-format>
<min-rater-count>0</min-rater-count>
<max-rater-count>2147483647</max-rater-count>
<rater-cat-min-err-msg><![CDATA["The number of participants in the [[CATEGORY]]
category does not meet the minimum of [[EXPECTED_COUNT]]. Please correct it before
moving the document forward."]]></rater-cat-min-err-msg>
<rater-cat-max-err-msg><![CDATA["The number of participants in the [[CATEGORY]]
category exceeds the maximum of [[EXPECTED_COUNT]]. Please correct it before moving
the document forward."]]></rater-cat-max-err-msg> <default-rater category="Direct
Report"><![CDATA[ED]]></default-rater>
<default-rater removable="false" category="Direct Manager"><![CDATA[EM]]></default-
rater>
<default-rater removable="false" category="Self"><![CDATA[E]]></default-rater>
</rater-config>
</rater-sect>
```

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Related Information

Adding Participants in 360 Review Forms [page 91]
Adding Participants in Evaluation Stage [page 92]
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3.1.2 Adding Participants in 360 Review Forms

Once you've launched the forms, you can add or remove raters from the *Rater List* section.

Context

You can also add permanent raters to the list.

Procedure

1. Go to *Performance*.
2. Choose a launched form.
3. On the *Participant List Section* page, click *Modify Participants*.

   You can filter your search based on divisions, departments, location, or user's name.

   > **Note**
   >
   > The corresponding button is *Add Participants* in 360 Reviews - SAP Fiori Version.
4. Click *Search Users*.

   > **Note**
   >
   > While searching for a user, if the search results return numerous users with similar names and you're unable to find the particular user you're looking for, use the *advanced search* link to find the user.
5. To choose all users as participants, click *Select All*. To verify all the newly added participants, scroll down to *Selected Participant*.

   Once the list is complete with all users' details, click *OK* to return to the form.
6. Click *Add to List*. This brings up the *Participant List Section* page.
7. On the *Participant List Section*, from the *Category* dropdown box to select the label such as *Upward*, *Downward/Colleague*, or *Self* for the new participants.

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3.1.3 Adding Participants in Evaluation Stage

Process owners and permitted roles can add participants when a 360 Reviews form is in Evaluation stage.

Prerequisites

You are among the roles who are granted with the permission *Enable Add New Participants after 360 Evaluation starts for:* in the *Form Template Settings* tool.

Context

There are different types of roles under the *Enable Add New Participants after 360 Evaluation starts for:* option. To understand the roles, see Definitions of Participants in Form Template Settings [page 93].

Procedure

1. Open a 360 Reviews form that is in Evaluation stage.
2. There're two ways to perform the current step:
   - If you're the process owner, go to the *Summary View* page.
   - If you're the other permitted role, submit the form first and go to the *Evaluation Summary* section in your completed form.
3. Choose + *Add New Participants*.

   You can also remove existing participants from the list.
4. Save you changes.

Results

You've added new participants to the form. After the Evaluation stage begins, process owners can also add alternative participants to the participant list if some of the initially added participants have declined to get involved in evaluation.

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Definitions of Participants in Form Template Settings [page 93]

3.1.3.1 Definitions of Participants in Form Template Settings

The following table lists definitions of participants to whom you can grant permissions in the *Form Template Settings* tool.

These participant options work in conjunction with each other, meaning users who fit in more than one category will get included. For example, if you select Manager/HR and Approvers because you want to exclude the subject of the evaluation (Employee), then make sure that the subject isn't also one of the Approvers. Otherwise, the subject will be included, even though you didn't specifically choose the option.

Definitions of Participants in Form Template Settings

Participants	Definitions
Process Owner	The last person to modify the form before it's distributed to others for evaluation. **Note** Permitted users who send the form into Evaluation stage by using tools in Admin Center aren't considered as the process owner.
Employee	The person who is the subject of the 360 evaluation.
Users With Detailed Reports Privilege	Any person who also belongs to a user group that has the Detailed Reports Privilege associated with it.
Manager/HR	The manager or the HR representative of the subject of the form.
Approvers	Everyone who contributed to, or modified, the content of the form before it was distributed for evaluation.

Participants	Definitions
All raters	All the raters who are involved in the form. → Tip Use this option if you want to let users choose whether they want to.

3.1.4 Changing Participant Category

You can change the participant category for a 360 form using *Admin Center* > *Change Participant Category*.

Prerequisites

- Ensure that the *Change Participant Category* permision is enabled in *Admin Center* > *Manage Permission Roles* > *Administrator Permission* > *Manage Documents*.
- Ensure that the 360 form for which you want to change the participant category is launched, and not in Modify Stage.

Procedure

1. Go to *Admin Center* > *Change Participant Category*.
2. Type the *Document Id* of a 360 form, and click *Find Document*.

   > **i Note**
   >
   > To determine a *Document Id*, navigate to *Performance* and hover over the "Information" icon in the "Action" column of any 360 form. This icon will show the document ID.

3. Change the participant category using *Change Categories* dropdown list.

Results

You have successfully changed the category of a participant.

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3.1.5 Removing Participants

You can remove participants using *Modify Participants*. Once the participants are removed from the participant list, they won't receive notifications to approve the 360 Review forms.

Procedure

1. Go to *Home* > *Performance*.
2. Choose a launched form.
3. On the *Participant List Section* page, click *Modify Participants*.

   Click any column header to sort the list, either ascending or descending

   > **i Note**
   >
   > For a 360 Reviews form of SAP Fiori version, you can click *Delete* to remove the participants.

4. Under *Actions*, click the *X* icon to remove the participants from the list.
5. To remove all participants, click *Clear List*.

   Note that you cannot remove the required names. Once the users are removed from the list, you can add them to the list again.

   If you don't want specific roles to modify participants. You can disable the Rater List section for the role by using the following XML code to make it read-only, so the *Modify Participants* button does not display.

```
<section-permission type="disabled">
      <role-name>*</role-name>
      <route-step stepid="*"/>
</section-permission>
```

Task overview: Raters in 360 Reviews Forms [page 89]

Related Information

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3.1.6 Removing 360 Reviews Forms of Inactive Employees in Bulk

You can bulk remove the 360 Reviews forms that are in the Evaluation stage from the inboxes of inactive employees.

Context

In the meantime, the inactive employees' statuses are marked as *Removed(Incomplete)* in the Evaluation Summary to indicate that they're no longer participants in the forms.

> **i Note**
>
> If the employees have submitted ratings before being set inactive, the ratings given by them are still valid in the forms, and their statuses are shown as *Completed*.

You can also bulk remove the 360 Reviews forms of inactive employees by using the *Employee Import* tool in *Admin Center*, or *Manage Scheduled Jobs* 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 *Admin Center* > *Employee Import*.
2. Choose *Remove Inactive Employees' 360 Evaluation Documents* in the *Specify Form routing options* section.
3. Validate and import your user file.

Results

The 360 Reviews forms that are in the Evaluation stage are removed from inactive employees' inboxes. Meanwhile, the employees' statuses are marked as *Removed(Incomplete)* in the Evaluation Summary. But you can still restore the forms that are deleted by using the *Restore Deleted Forms* tool.

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3.1.7 Retaining Inactive Employee' 360 Evaluation Documents

In the Form Template level, you can enable the option to avoid inactive users been removed for a particular template.

Context

It is possible to override this setting at the form template level, so that for a particular template inactive users forms are not removed even if the *Do Not Remove Inactive Employee' 360 Evaluation Documents* option is checked when setting user status.

Procedure

Go to *Admin Tools* > *Form Templates* > *Select a template*, check *Do Not Remove Inactive Employees' 360 Evaluation Documents* option, and save.

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3.1.8 Specifying Minimum and Maximum Participant Numbers and Defining Warning and Error Messages

You can specify minimum and maximum numbers of participants and define warning or error messages that show when participants added do not meet a specified limit.

When a warning message shows up, users are alerted to the fact that they're below the minimum or above the maximum limit, but they still can forward the form to the next step; when an error message shows up, users cannot forward the form onto the next step.

Specify Minimum and Maximum Numbers for the Participant List and Define Messages

Use the elements `min-rater-count` and `max-rater-count` to specify minimum and maximum numbers of participants for the participant list. Set `max-rater-count` to `0` if you don't want an upper limit for the number of raters to be added. You can go on to define warning or error messages using these elements: `min-warning-msg`, `min-error-msg`, `max-warning-msg`, and `max-error-msg`.

The following example demonstrates how to specify the minimum number of participants and define a warning message that shows up if participants added don't meet the minimum limit.

```
<rater-sect>
...
<min-rater-count>0</min-rater-count>
<min-warning-msg><![CDATA[WARNING: Number of participants selected -
[[ACTUAL_COUNT]] - less than the minimum number of [[EXPECTED_COUNT]].
Please select more than 1 participants.]]></min-warning-msg>
...
</rater-sect>
```

The following example demonstrates how to specify the maximum number of participants and define an error message that shows up if participants added exceed the specified maximum limit.

```
<rater-sect>
...
<max-rater-count>5</max-rater-count>
```

```
<max-error-msg><![CDATA[ERROR: Number of participants selected - [[ACTUAL_COUNT]] -
exceeds the maximum number of [[EXPECTED_COUNT]].
Please select no more than 5 participants.]]></max-error-msg>
...
</rater-sect>
```

Specify Minimum and Maximum Numbers by Categories and Define Messages

Additionally, you can use the attributes `min-count` and `max-count` in a `meta-cat` element to specify minimum and maximum numbers of participants for a particular category. You can go on to define warning or error messages using these elements: `rater-cat-min-warn-msg`, `rater-cat-min-err-msg`, `rater-cat-max-warn-msg`, and `rater-cat-max-err-msg`.

The following example demonstrates how to specify the minimum and maximum numbers of participants for a particular category and define an error message that shows up if participants added for that category exceed the specified maximum limit.

```
<fm-meta>
...
<meta-cat hidden-threshold="1" min-count="0" max-count="5" cat-weight="10.0" ><!
[CDATA[Peer]]></meta-cat>
...
</fm-meta>
<rater-sect>
...
<rater-cat-max-err-msg><![CDATA[ ERROR: Number of participants selected for the
Category "[[CATEGORY]]" is [[ACTUAL_COUNT]],
which exceeds the expected number of participants permitted - [[EXPECTED_COUNT]].
Please remove some of the participants until the expected number is met.]]></rater-
cat-max-err-msg>
...
</rater-sect>
```

The following example demonstrates how to specify the minimum and maximum numbers of participants for a particular category and define a warning message that shows up if participants added for that category don't meet the specified minimum limit.

```
<fm-meta>
...
<meta-cat hidden-threshold="1" min-count="0" max-count="5" cat-weight="10.0" ><!
[CDATA[Peer]]></meta-cat>
...
</fm-meta>
<rater-sect>
...
<rater-cat-min-warn-msg><![CDATA[ WARNING: Number of participants selected for the
Category "[[CATEGORY]]" is [[ACTUAL_COUNT]],
which is less than the minimum number of participants permitted -
[[EXPECTED_COUNT]].
Please select more than 1 participants.]]></rater-cat-min-warn-msg>
...
</rater-sect>
```

Parent topic: Raters in 360 Reviews Forms [page 89]

Related Information

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3.1.9 External Raters

In the Modify and the Evaluation stages, roles defined in a route map can add external raters in the system with Single Sign-On (SSO) enabled.

Before external users are added, admins turn on the 360 External Participant email notifications, among which the *360 Document Evaluation Notification for External Participant* notification is a must. When external users are added to the Rater List, e-mails are sent automatically to seek their consent on participation and evaluation. If they accept the invitation, they're taken to an external authorization screen on which they enter a verification code that is sent by e-mail.

The external raters have limited permissions. They can't see or access anything in the system beyond the 360 form that they've been asked to complete. Likewise, they can't see or access anything on the form beyond the permissions granted to the form. When they start the evaluation, they can give ratings and comments. Once they complete the forms, they can't edit or recall the completed forms.

When external raters complete all their forms or are otherwise no longer needed, you can delete their data by creating a DRTM 360 Reviews - External User Purge request at *Data Retention Management*. You can specify detailed criteria that external users or their forms must meet before the external users' data is deleted.

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Data Included in the DRTM 360 Reviews - External User Purge

3.1.9.1 Adding External Raters

When a 360 form is in the Modify and the Evaluation stage, roles defined in the route map template can add external users, existing or new, to collect their ratings and comments.

Prerequisites

- *Enable Use of External Users (V10 & V11 ONLY)* is checked 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.
- *Enable 360 Add External Participants section* is checked in *Admin Center* > *Form Template Settings* for the target form template.
- The *360 Document Evaluation Notification for External Participant* is turned on.

Context

When you enable *Hide External Users from search results* in *Admin Center* > *Company System and Log Settings*, the external users are hidden from search result throughout SAP SuccessFactors applications. But in 360 Reviews - SAP Fiori Version, users can still find external users in the *Add Participants* dialog window even though the setting is enabled. This is because we decouple that the setting from the search function in 360 Reviews - SAP Fiori Version.

Procedure

1. Go to *Add Participant* page.

   A dialogue pops up in which you can search for external users as well as internal users.
2. Enter an external user's first name, last name, username, or e-mail address.

   i Note

   Finding users by their usernames requires that the *Hide (user name) in the UI* is deselected in Provisioning.

   - For an existing external user, enter the user's name, username, or e-mail address.

- For a new external user, click *Add a new external participant.* in the dropdown list of search box to create a new account and the system will add it to the list simultaneously.

> **Note**
>
> If the entered e-mail address already exists, you can complete the user information in *Admin Center* > *Manage Users*, and then go back to search for and add this user.

3. Click *Add to List* to finish.

Results

External raters receive e-mails asking their consent on the participation and evaluation.

3.2 Sending a Copy of a Completed Form

When a form is completed, you can send a copy of it to 10 internal users at most in one go.

Procedure

1. Go to *Performance* and choose a completed 360 Reviews form.
2. Click *Send Copy*.

   You can disable the *Send Copy* button through *Admin Center* > *Form Template Settings* > *Disable Send button for completed documents*.
3. Find and select the users to whom you want to send the copy.
4. Click *Send*.
5. Click *Send* to finish.

   If *Document Forward Notification* is enabled, you can also add comments to the copy before sending it.

Results

You've sent the copy of a completed form to target users. The receivers can find the read-only copy in the *Completed* folders.

4 Admins' Tasks

Learn about what admins can do with 360 Reviews forms.

4.1 Managing Forms Using Admin Center

You can manage the 360 form from Admin Center

Route Maps [page 103]
Route maps define how 360 forms are routed during the 360 review process. They include four stages, the Modify, Evaluation, Signature, and Completion Stage.

Launch Forms [page 116]
You can launch 360 Reviews forms from *Admin Center* > *Launch Forms*.

Managing Employees' 360 Reviews Forms in Evaluation Stage [page 117]
You can complete or delete 360 forms from *Admin Center* > *Complete/Decline 360 documents*.

Document Transfer for 360 Forms [page 118]
Document transfer is used to transfer employee's documents from old manager to new manager when the employee's manager is changed.

Enabling Add Approver [page 127]
Enable the Add Approver feature on 360 Reviews form so that users can add approvers to form route map.

4.1.1 Route Maps

Route maps define how 360 forms are routed during the 360 review process. They include four stages, the Modify, Evaluation, Signature, and Completion Stage.

A route map defines a robust workflow process that ensures 360 forms are securely routed to all the right people during the 360 review process. Depending on your roles, forms can be routed in different ways:

- Submit a form after completing it.
- Use the admin tool *Route Form* (Route Document).
- Use the mass routing feature in the form inbox or 360 Executive Review.

There are four stages of a 360 Reviews route map:

- Modify Stage: During the 360 review process, employees and managers nominate raters such as peers, managers, direct reports, and even external parties in this stage.
- Evaluation Stage: During the 360 review process, raters evaluate the subject of the form in this stage.
- Signature Stage: During the 360 review process, roles defined in route map steps can sign the form in this stage.

Roles with proper permissions can reject the form, which removes all signatures and reverts it back to the Evaluation stage. The rejected form goes back to the Process Owner's inbox for re-evaluation before due date, and to other participants' Completed folder.
Meanwhile, permissioned roles can send the form back to a specific role for additional changes, which also removes all signatures and reverts it back to the Evaluation stage.

- Completion Stage: During the 360 review process, the form is officially completed, and review reports are available in this stage.

HR admins can use the admin tool *Route Form* to route or approve forms.

Parent topic: Managing Forms Using Admin Center [page 103]

Related Information

Launch Forms [page 116]
Managing Employees' 360 Reviews Forms in Evaluation Stage [page 117]
Document Transfer for 360 Forms [page 118]
Enabling Add Approver [page 127]

4.1.1.1 Creating a Route Map

To define how 360 forms are routed during the 360 review process, create route maps using *Manage Route Maps*.

Prerequisites

1. *Workflow* has been enabled 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.

2. The permission of *Routing Maps* under *Manage Form Templates* has been granted.

Context

You can create route maps at any time. After you've created a route map, associate the route map to a specific form template before the route map can be used.

Procedure

1. Go to *Admin Center* > *360 Reviews*, select *Manage Route Maps*.
2. Choose *Add New Route Map* > *Build Your Own*.
3. Select *I want to personalize the evaluation stage in a 360 review route map*.

   An evaluation step is added to the Evaluation Stage.
4. Click the add button in the Modify Stage or Signature Stage to add a step.

   Since the Evaluation Stage is where raters evaluate the subject of the form, it only includes one step. You can't add more steps to this stage. Because users can't modify the form in the Completion Stage, you can't create steps for this stage.
5. Enter a step name in the *Create A New Modification Step* dialog box, for example, Employee Nominates Raters.
6. Complete step configurations for the steps you've added.

   The following table lists the fields of the step you can configure. Some fields listed in the table don't apply to all stages, but only apply to specific stages.

Field	Description
Step Name	The name of the step displayed in the route map within the form. **Note** In 360 Reviews, this field doesn't take effect in the Signature Stage. The step name always shows Signature, regardless of the name you've configured in this field. In 360 Reviews - SAP Fiori Version, this field takes effect in all stages.
Step Description	The description that gives more context on the action users are about to take. It appears in the *To Do* tile on users' *Home* page.

Field	Description
Step Type	• *Single Role*: The form is assigned to a single role in the current step, for example, employees are assigned to nominate raters. • *Iterative*: Allows several users to work on a step. In this type of step, the form is sent to one user at a time, and that user sends the form to the other users specified in the step. It's the most commonly used step type when several users work on the step. If you use the Iterative step, also specify the roles to participate in the step. For example, I E EM EH specifies an iterative step between the employee, the employee's manager, and the employee's HR representative. All the three roles can edit and send the form back and forth to each other before routing the form to the next step. If you use the Iterative step, we recommend that you also specify the entry user who receives the form first and the exit user who sends the form to the next step. • *Collaboration*: 360 Reviews doesn't support a collaboration step in route maps.
Roles	Choose from the dropdown list the role you want the form to send to in this step. SAP SuccessFactors uses job roles instead of employee names to specify who receives a form. This is because the same form template is typically distributed to multiple users, and it's easier for you to designate a role rather than a specific person. For example, if you're launching a 360 review cycle for the entire company, you can specify that the form is sent to the subject of the review first. However, you can designate a specific person if it better meets your business requirements. A custom option is available in the dropdown list if your needs are more advanced. Examples of custom codes include: • R - Recruiter in Recruiting • W - Second recruiter in Recruiting • Q - VP of staffing in Recruiting • T - Primary coordinator in Recruiting • G - Hiring manager in Recruiting • EMMM - Employee's 3rd level manager • S - Sourcer in Recruiting • I F - Family expert (only valid in the signature stage)

Field	Description
Start Date	The date when you want users to start working on this step. This means that forms can be moved into this step early, but users shouldn't start working on this step until this date has passed. However, setting a start date doesn't automatically lock the form. Users can work on the step any time, even before the start date. If you want to enforce the start date, select *Enforce Start Date*. This option locks the form in read-only mode until the enforced start date is reached. Therefore, users won't be able to work on the step until the specified start date.
Exit Date	Enter the earliest date when employees can move the form to the next step. Use this date only if you want to prevent employees from sending the form to the next step at any time. **Note** If you're using the *Automatic send on due date* option in the *Due Date* field, the exit date must be earlier than the due date.
Due Date	The date when the step should be completed. If you want to have the form automatically forward to the next step on the due date, select *Automatic send on due date*. **Note** The form is sent to the next step on the next day of the due date. Additionally, if you want to only send forms that pass the form validation check, select *Only send forms that pass validation*. Forms that fail to pass validation aren't automatically moved to the next step. To send all forms regardless of whether they pass validation, select *Always send regardless of validation*.
Carbon Copy These User Roles Upon Document Completion	Specify roles to receive a copy of the form after it's completed.
Advanced options	
Step Introduction & Mouseover text	The text users see when they point the mouse at the step. The text appears only before the step is completed. **→ Tip** Use this field to provide a brief description of what users are expected to do during this step.

Field	Description
Step Name After Completion	The names of the users see after the step is completed. If you leave this field blank, the step name remains the name specified in *Step Name*.
Reject Button Mouseover Text	The text shown to users when they point the mouse at the reject button. The reject button is used to send the form back one step in the route map. This button only appears in signature steps. It's helpful to use this text to provide a brief description of the reject action.
Step Mode	Specifies the extent to which users can modify the content of the form in this step. • *Full Edit*: Allows users to change any content in text areas. • *Comment Only*: Only allows users to add evaluation comments to the form. • *Signature*: Allows users to electronically sign the form, but not to modify the content. Only applies to steps in the Signature Stage and is the only option available in that stage.
Exit Button Text	The text for sending the form to the next step. This text appears on the Routing options button or the dropdown menu for the step. This text also appears on the button on the confirmation page.
Step Exit Text	The text that appears on the confirmation page before the form routes to the next step. → Tip Use this field to let users know what they need to do and what their action means.
Previous Step Exit Button Text	The text for sending the form to the previous step. This text appears on the Routing options button or the dropdown menu for the step. This text also appears on the button on the confirmation page.
Previous Step Exit Text	The text that appears on the confirmation page before the form is sent back to the previous step. → Tip Use this field to let users know what they need to do and what their action means.

Field	Description
Step Id	The ID that the system uses to identify the step internally. It's not the order of the step in the route map. **i Note** Step Id shouldn't contain spaces or accented characters.

7. Click *Save* at the left top of the page.

   A new route map is created successfully.

Next Steps

After you've created a route map, you can modify the route map as needed. See Modifying a Route Map [page 109].

To use the newly created route map, associate the route map with a form template. See Associating a Route Map with a Form Template [page 114].

4.1.1.2 Modifying a Route Map

You can modify route maps anytime as needed using *Managing Route Maps*.

Prerequisites

1. *Workflow* has been enabled 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.

2. The permission of *Routing Maps* under *Manage Form Templates* has been granted.

Context

After you modify a route map, the modified route map only applies to the new forms launched after the modification. All existing forms use the original route map.

Procedure

1. Go to ▶ *Admin Center* ▶ *360 Reviews* ▶, select *Manage Route Maps*.
2. Choose the route map you want to modify.
3. Make any of the following changes:
   - Click the add button in the Modify or Signature Stage to add a step.
     Since the Evaluation Stage is where raters evaluate the subject of the form, it only includes one step. You can't add more steps to this stage. Because users can't modify the form in the Completion Stage, you can't create steps for this stage.
   - Remove the existing steps in the Modify or Signature Stage.
   - Modify step configurations for the existing steps. The following table lists the fields of the step you can configure. Some fields listed in the table don't apply to all stages, but only apply to specific stages.

Field	Description
Step Name	The name of the step displayed in the route map within the form. **i Note** In 360 Reviews, this field doesn't take effect in the Signature Stage. The step name always shows Signature, regardless of the name you've configured in this field. In 360 Reviews - SAP Fiori Version, this field takes effect in all stages.
Step Description	The description that gives more context on the action users are about to take. It appears in the *To Do* tile on users' *Home* page.

Field	Description
Step Type	• *Single Role*: The form is assigned to a single role in the current step, for example, employees are assigned to nominate raters. • *Iterative*: Allows several users to work on a step. In this type of step, the form is sent to one user at a time, and that user sends the form to the other users specified in the step. It's the most commonly used step type when several users work on the step. If you use the Iterative step, also specify the roles to participate in the step. For example, I E EM EH specifies an iterative step between the employee, the employee's manager, and the employee's HR representative. All the three roles can edit and send the form back and forth to each other before routing the form to the next step. If you use the Iterative step, we recommend that you also specify the entry user who receives the form first and the exit user who sends the form to the next step. • *Collaboration*: 360 Reviews doesn't support a collaboration step in route maps.
Roles	Choose from the dropdown list the role you want the form to send to in this step. SAP SuccessFactors uses job roles instead of employee names to specify who receives a form. This is because the same form template is typically distributed to multiple users, and it's easier for you to designate a role rather than a specific person. For example, if you're launching a 360 review cycle for the entire company, you can specify that the form is sent to the subject of the review first. However, you can designate a specific person if it better meets your business requirements. A custom option is available in the dropdown list if your needs are more advanced. Examples of custom codes include: • R - Recruiter in Recruiting • W - Second recruiter in Recruiting • Q - VP of staffing in Recruiting • T - Primary coordinator in Recruiting • G - Hiring manager in Recruiting • EMMM - Employee's 3rd level manager • S - Sourcer in Recruiting • I F - Family expert (only valid in the signature stage)

Field	Description
Start Date	The date when you want users to start working on this step. This means that forms can be moved into this step early, but users shouldn't start working on this step until this date has passed. However, setting a start date doesn't automatically lock the form. Users can work on the step any time, even before the start date. If you want to enforce the start date, select *Enforce Start Date*. This option locks the form in read-only mode until the enforced start date is reached. Therefore, users won't be able to work on the step until the specified start date.
Exit Date	Enter the earliest date when employees can move the form to the next step. Use this date only if you want to prevent employees from sending the form to the next step at any time. **Note** If you're using the *Automatic send on due date* option in the *Due Date* field, the exit date must be earlier than the due date.
Due Date	The date when the step should be completed. If you want to have the form automatically forward to the next step on the due date, select *Automatic send on due date*. **Note** The form is sent to the next step on the next day of the due date. Additionally, if you want to only send forms that pass the form validation check, select *Only send forms that pass validation*. Forms that fail to pass validation aren't automatically moved to the next step. To send all forms regardless of whether they pass validation, select *Always send regardless of validation*.
Carbon Copy These User Roles Upon Document Completion	Specify roles to receive a copy of the form after it's completed.
Advanced options	
Step Introduction & Mouseover text	The text users see when they point the mouse at the step. The text appears only before the step is completed. **Tip** Use this field to provide a brief description of what users are expected to do during this step.

Field	Description
Step Name After Completion	The names of the users see after the step is completed. If you leave this field blank, the step name remains the name specified in *Step Name*.
Reject Button Mouseover Text	The text shown to users when they point the mouse at the reject button. The reject button is used to send the form back one step in the route map. This button only appears in signature steps. It's helpful to use this text to provide a brief description of the reject action.
Step Mode	Specifies the extent to which users can modify the content of the form in this step. • *Full Edit*: Allows users to change any content in text areas. • *Comment Only*: Only allows users to add evaluation comments to the form. • *Signature*: Allows users to electronically sign the form, but not to modify the content. Only applies to steps in the Signature Stage and is the only option available in that stage.
Exit Button Text	The text for sending the form to the next step. This text appears on the Routing options button or the dropdown menu for the step. This text also appears on the button on the confirmation page.
Step Exit Text	The text that appears on the confirmation page before the form routes to the next step. → Tip Use this field to let users know what they need to do and what their action means.
Previous Step Exit Button Text	The text for sending the form to the previous step. This text appears on the Routing options button or the dropdown menu for the step. This text also appears on the button on the confirmation page.
Previous Step Exit Text	The text that appears on the confirmation page before the form is sent back to the previous step. → Tip Use this field to let users know what they need to do and what their action means.

Field	Description
Step Id	The ID that the system uses to identify the step internally. It's not the order of the step in the route map. **i Note** Step Id shouldn't contain spaces or accented characters.

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

   A route map is modified successfully.

4.1.1.3 Associating a Route Map with a Form Template

Associate route maps with the 360 form templates you're using in *Form Template Settings*. You can also associate a different route map with the form template that has had one.

Prerequisites

You've created a 360 review form template and the route map you want to use. Also, make sure that you have the required permission. In *Admin Center* > *Manage Permission Roles* > *[Permission Role]* > *Permission...* > *Administrator Permissions* > *Manage Form Templates*, select *Form Templates*.

Context

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

If you change a route map after you associate it with a form template or associate a different route map with a form template, the change is reflected only on new forms launched from the form template. All existing forms use the original route map.

Procedure

1. Go to *Admin Center* > *360 Reviews*, select *Form Template Settings*.
2. Choose a form template.
3. Choose the route map you want to associate with this form template from the *Routing Map* dropdown list.

4. Click *Update Form Template* at the left bottom of the page.

   The form template is successfully associated with the route map.

4.1.1.4 Roles

Learn about the standard and custom roles that are used in Performance Management.

Role Value	Role Name	Role Description
E	Employee	Employee
EM	Manager	Employee's direct manager
EMM	2nd Level Manager	Employee's second-level manager
EX	First Matrix Manager	Matrix managers are the "dotted-line" managers of employees. EX is the primary matrix manager defined in the instance.
EP	All Matrix Managers	EP is all the matrix managers of employees defined in the instance. For iterative and collaboration steps only.
EH	HR Rep.	Employee's HR representative
EHM	HR Rep.'s Manager	Direct manager of employees' HR representative
U	User	A specific user. For single-role steps and signature steps only.
O	Originator	User who creates the form
OM	Originator's Manager	Direct manager of the user who creates the form
EA	Employee's second manager	Custom role. It is used for Compensation processes where the compensation hierarchy and workflow may be different from the organization hierarchy. It can also be used in the same way as the EM role in Performance Management.
EMMM	Employee's 3rd level manager	Custom role

4.1.2 Launch Forms

You can launch 360 Reviews forms from *Admin Center* > *Launch Forms*.

If you want to launch forms for multiple employees, you can upload a .csv file with user IDs of employees you create forms for.

On the *Select Employees* tab, there is a *Upload Participant List* feature that allows you to create forms with predefined raters. It is only applicable for 360 Reviews forms, and will be disabled if any *recurring schedule* option is selected on the *Launch Date* tab. In the upload file, the header row should include the following fields:

- **SUBJECT_ID**: User ID of form subject
- **RATER_ID**: User ID of rater who provides ratings on the form
- **RATER_CATEGORY**: Rater's category, such as peer and other.

> i Note
>
> To ensure that 360 forms are launched successfully, please do not include inactive users in the upload participant list.

Using proper elements or attributes in the form template file, you can specify the maximum and minimum numbers of participants for the whole participant list or by individual categories. It's recommended that you also define out-of-range warning or error messages if you choose to specify the maximum and minimum numbers. See "Specifying Maximum and Minimum Participant Numbers and Defining Warning and Error Messages" in the *Related Information* section for details.

Parent topic: Managing Forms Using Admin Center [page 103]

Related Information

Route Maps [page 103]
Managing Employees' 360 Reviews Forms in Evaluation Stage [page 117]
Document Transfer for 360 Forms [page 118]
Enabling Add Approver [page 127]
Specifying Minimum and Maximum Participant Numbers and Defining Warning and Error Messages [page 98]

4.1.3 Managing Employees' 360 Reviews Forms in Evaluation Stage

You can complete or delete 360 forms from *Admin Center* > *Complete/Decline 360 documents*.

Context

> **Note**
>
> *Complete/Decline 360 documents* only works for 360 forms in Evaluation stage.

Procedure

1. Go to *Admin Center* > *Complete/Decline 360 documents*.
2. Type the employee username, and click *Find Document*.
3. Select the 360 form that you want to complete or delete, and then choose *Complete document* or *Decline document*.

Task overview: Managing Forms Using Admin Center [page 103]

Related Information

Route Maps [page 103]
Launch Forms [page 116]
Document Transfer for 360 Forms [page 118]
Enabling Add Approver [page 127]

4.1.3.1 Declining Multiple 360 Reviews Forms in Evaluation Stage

Use the mass decline option to decline multiple incomplete forms by uploading a CSV file with the affected document ID's.

Context

You can mass decline all incomplete 360 evaluation forms by uploading a CSV file with the affected document IDs.

> **i Note**
>
> If you use the *Admin Center* > *Route Document* tool to batch route forms, it can auto-decline the forms that are in Evaluation stage.

Procedure

1. Go to *Admin Center* > *Complete/Decline 360 Documents* and click the *Mass Decline-Complete 360 Documents* link.
2. In the *Select Action* dropdown, select *Mass Decline 360 Evaluation Documents* to decline 360 forms in Evaluation stage.

   > **i Note**
   >
   > You can select *Mass Complete 360 Documents* to push the forms to completion.
3. Click *Browse* to upload a csv file with document IDs. The file should just contain one column with document IDs, and should not have any column title.
4. Click *Process* and wait for the results of the import. If anything fails, the affected document IDs will appear.

4.1.4 Document Transfer for 360 Forms

Document transfer is used to transfer employee's documents from old manager to new manager when the employee's manager is changed.

There are some business events that require employee's performance related documents to be transferred between managers, for example, when the manager of a department is changed. Document transfer and related features can be used to facilitate manual or automatic movement of documents between users.

To enable document transfer feature, the first step is to make sure that the document transfer options have been checked on the *Form Template Settings* page. Then you need to configure document transfer in different tools, for example, user import tool. Document transfer options should be configured at both the form template level and user data level, but the form template level settings will override the settings on the user data level.

> **Note**
>
> If you trigger 360 document transfer via People Profile, the following two options on *Form Template Settings* are not supported:
>
> - *When transferring 360 documents from old manager's inbox folder to new manager, do not auto decline old manager's participant forms in evaluation.*
> - *When transferring 360 documents which are in evaluation stage, add new manager as a participant. (If new manager is a removed participant, he/she will be re-added.)*

Parent topic: Managing Forms Using Admin Center [page 103]

Related Information

Route Maps [page 103]
Launch Forms [page 116]
Managing Employees' 360 Reviews Forms in Evaluation Stage [page 117]
Enabling Add Approver [page 127]

4.1.4.1 User Import Tools

You can use *Employee Import*, *Manage Users*, HRIS Sync, and more to import or update users and set up document transfer options.

Tool	Employee Central Enabled	Description	More Information
Employee Import	No	You can import multiple users using *Admin Center* > *Employee Import* and then specify the document transfer and removal options in the *Specify Form routing options* section. **Note** If you update employee's manager using the import file but the employee's new manager has not been granted the *User Login* role-based permission, forms will not be successfully transferred to the new manager even though the import job is completed. You can also request an *Employee Import* job from 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.	Importing User Data

Tool	Employee Central Enabled	Description	More Information
Manage User	No	You can update users using *Admin Center* > *Manage Users*. When you change the employee's manager in the *Manager* field and then save the change, a window pops up asking if you want to route the form to the new manager. Choose *OK* if you want to trigger document transfer.	Updating Users

Tool	Employee Central Enabled	Description	More Information
HRIS Sync	Yes	When an employee's Job Information data is updated with a new manager, on the Effective Date of the Job Info record where the manager change is made, the system will synchronize the manager change to basic user data and will then transfer forms based on the options you have enabled in the HRIS Sync job. HRIS Sync can be triggered in any of the following ways: real-time sync integration by UI operation, scheduled HRIS Sync jobs, and Employee Central data import. To create a scheduled HRIS Sync job, go to *Provisioning* > *Manage Scheduled Jobs* > *Create New Job* > *HRIS sync*, and configure document transfer settings in *Job Parameters*. → 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.	Human Resource Information System (HRIS) Synchronization Syncing HRIS Data
Basic Import	Yes	You can trigger document transfer at the time of importing employee data. Go to *Admin Center* > *Import Employee Data* > *Basic Import* to submit a job.	Employee Data Import Process Configuring Additional Options with Basic Imports

> **Note**
>
> If you use the *Import Matrix Manager and Custom Manager Relationships* admin tool to import matrix managers and custom managers for Succession Org Chart, document transfer will not be triggered.

4.1.4.2 Configuring Document Transfer in Form Templates

To enable the document transfer feature, first configure the document transfer settings in form templates.

Prerequisites

The settings are applicable for managers and matrix managers. Make sure that *Enable document transfer for Matrix Manager change* is selected in the *Cross Talent Feature Settings* admin tool.

Procedure

1. In Admin Center, go to *Form Template Settings* and open a form template.
2. Select the following settings to suit your business needs.

Setting	Description
Do Not Transfer Documents	If selected, forms won't get transferred when manager is changed regardless of any other settings you've configured elsewhere. **→ Remember** It is for the current step only and doesn't affect future manager steps. It only prevents forms from being transferred at the time of user import, which means that the current user keeps the forms regardless of manager changes. However, future steps will reflect the manager changes. **⚠ Caution** If you've configured form permissions, for example, for the EM role, and an employee's manager is changed, though the old manager keeps the form, none of the permissions for the EM role will be applied to the old manager because they are no longer the EM role. There-

<table>
<tr><th>Setting</th><th>Description</th></tr>
<tr><td></td><td>
fore, configure this setting only when there are no more manager actions to complete the form.
With this setting enabled, when the EP role (all matrix managers) is changed during the iterative step for the EP role, the matrix manager who currently reviews forms keeps the forms. Meanwhile, the matrix manager reviewer list for the future steps within the iterative step is updated according to the latest changes.
Example
The EP role, EX1, EX2, and EX3 participate in an iterative step of a performance review. Currently, EX2 is reviewing the form. See the following table for the use cases of EP role changes:
<table>
<tr><th>EP Role Change</th><th>Matrix Manager Reviewer List</th></tr>
<tr><td>Add EX4</td><td>EX1 > EX2 > EX3 > EX4</td></tr>
<tr><td>Remove EX1</td><td>EX2 > EX3</td></tr>
<tr><td>Remove EX2</td><td>EX1 > EX2 > EX3

Note

EX2 remains on the reviewer list when reviewing the form. After the form is sent to another user, EX2 will be removed from the list.</td></tr>
<tr><td>Remove EX1, EX2, and EX3</td><td>EX2

Note

EX2 remains on the reviewer list when reviewing the form. After the form is sent to another user, EX2 will be removed from the list.</td></tr>
<tr><td>Adjust the order of EX1 and EX2</td><td>EX2 > EX1 > EX3</td></tr>
</table>
</td></tr>
</table>

Setting	Description
	<table><tr><th>EP Role Change</th><th>Matrix Manager Reviewer List</th></tr><tr><td>Update EX2 to EX4</td><td>EX1 > EX4 > EX3 > EX2 **Note** EX2 remains on the reviewer list when reviewing the form. After the form is sent to another user, EX2 will be removed from the list.</td></tr></table>
Automatic Manager Transfer > Automatic insertion of new manager as next document recipient if not already	If selected, the new manager will become a part of the review process and the old manager will be removed from accountability going forward. • If the current step is a single manager step, a new step with the same step name as the current one will be added as the next step for the new manager. • If the current step is a single step not for managers, a new step named Document Transfer will be added as the next step for the new manager. • If the current step is an iterative or collaboration step, no new step will be added. • If the next step is already for managers, no new step will be added. However, if the next step is the first step in the Signature stage for managers, a new step named Document Transfer will be added to the Modify stage for the new manager. The old manager will retain a copy of the form when the form is moved to the new manager, but the copy will not get updated with any new information. **Note** Do not enable this setting unless you want the new manager to be the next reviewer in any cases. Consider our tip and warning below: • This setting may not make sense for the last few steps of performance reviews. For example, when the form is about to be moved to a signature step,

Setting	Description
	inserting the new manager in this step may not be desirable because the new manager has had no insight into the history of the form. • With this setting enabled, a new step, an alternate route user step, will be added to the route map, which may introduce a security hole by exposing certain data.
Automatic Manager Transfer > Automatic Inbox Document Transfer To New Manager	If selected, forms will be transferred from the old manager's Inbox to the new manager's Inbox. The old manager will retain a copy of the form when the form is moved to the new manager, but the copy will not get updated with any new information.
Automatic Manager Transfer > Automatic En Route Document Transfer To New Manager	If selected, forms will be transferred from the old manager's En Route folder to the new manager's En Route folder. The old manager will retain a copy of the form when the form is moved to the new manager, but the copy will not get updated with any new information.
Automatic Manager Transfer > Automatic Completed Document Copy to New Manager	If selected, all completed forms of the employee will be transferred from the old manager's Completed folder to the new manager's Completed folder. The copy of the forms will be sent to the new manager, and the old manager will retain the original forms.
Automatic Manager Transfer > Hide Visibility After Document Transfer	If selected, after forms are transferred to the new manager, the forms will be hidden from the old manager. ℹ Note This setting is not supported for 360 Reviews forms.
Automatic Manager Transfer > Automatic Process Owner Change To New Manager For In-Progress Documents When Old Manager is Process Owner (Only for 360)	If selected, and the old manager is the process owner, also known as the last Modify step user, of in-progress 360 Reviews forms, the process owner will be changed to the new manager. If the new manager is a rater, they can access the forms in Inbox. If the new manager is not a rater, they can access the forms in the En Route folder. The old manager will retain access to the forms.
Automatic Manager Transfer > Automatic Process Owner Change To New Manager For Completed Documents When Old Manager is Process Owner (Only for 360)	If selected, and the old manager is the process owner, also known as the last Modify step user, of completed 360 Reviews forms, the process owner will be changed to the new manager.

Setting	Description
	The new manager can access the forms in the Completed folder, and the old manager will retain access to the forms.

3. Choose *Update Form Template* to save changes.

4.1.5 Enabling Add Approver

Enable the Add Approver feature on 360 Reviews form so that users can add approvers to form route map.

Context

After you enable this feature, managers can nominate approvers in a form that is in the Modify stage. The approvers can modify the content of the form before it’s distributed for evaluation.

Procedure

1. Go to *Admin Center* > *Form Template Settings*.
2. Enable *Allow Add Approver/Evaluator*.
3. Save your changes.

Results

Permitted users can find the Add Approver button on the lower right corner of a form that is in the Modify stage.

Task overview: Managing Forms Using Admin Center [page 103]

Related Information

Route Maps [page 103]
Launch Forms [page 116]
Managing Employees' 360 Reviews Forms in Evaluation Stage [page 117]
Document Transfer for 360 Forms [page 118]

4.2 Using 360 Executive Review

360 Executive Review allows super HR roles or other users to monitor form status and access 360 forms even if they are not on the route map.

Prerequisites

Before using *360 Executive Review*, ensure you've done the following:

- Select the option *360 Multi-Rater* in Provisioning.
- Select the option *Enable 360 Executive Review Page - requires 360 Multi-Rater and Role Based Permission* in Provisioning.
- Grant the necessary role-based permission (RBP) to users.
  To grant the permission for 360 Executive Review, go to *Admin Center* > *Manage Permission Roles*; select a role the users belong to; in the page that appears, go to *Permission* > *Administrator Permissions* > *Manage Documents*; and select the *360 Executive Review* permission.

> → 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.

Context

> i Note
>
> If logged-in users are on the form route map, they cannot access the form using *360 Executive Review*.

Procedure

1. Go to *Admin Center* > *Performance* and click the *360 Executive Review* tab.
2. On the *360 Executive Review* page, apply filters, for example Template Name and Form Status, to filter the forms.

   To save your selected filters for easy access next time, you can choose *Save As* in the *Default View* menu and name the custom view. Note that saved custom views will disappear if you clear your browser cache, and they cannot be shared across different user accounts.
3. Expand *Forms Summary* for two pie charts indicating the number and percentage of forms in the filtered form status and due date status.

4. In the form list, you can view the form status and current step, and do the following:
    - Mass route forms forward or backward using the *Send to Previous Step* or *Send to Next Step* button.

      > **Note**
      >
      > Mass routing will be synchronous when the number of forms being routed is no greater than 20. If you select more than 20 forms to be mass routed, a job will then be triggered in Provisioning.
    - Click and open a form to modify it based on the current route step. For example, you can add or remove raters when the form is in the Modify stage.

    An email will be sent to the current step owner when the form is changed in any of the following ways:
    - The form is deleted after being launched.
    - Participants are added or removed.
    - Competencies are added or removed.
    - The form is sent back.
    - The form is mass-routed.

5 Detailed 360 Report

After a 360 Reviews form is completed, you can view its detailed 360 report, which provides both an overview and an in-depth look at employees' ratings.

Features

- **Four report views**:
  - Graphical Summary
  - Gap Analysis
  - Hidden Strengths and Blind Spots
  - Rank

  To understand these four views, see Views in Detailed 360 Report [page 131].
- **Customized print view** (Only available in 360 Reviews - SAP Fiori Version): Instead of printing the report in all available views, you can customize specific views to print.

Limitation

For both the 360 v11 and 360 Fiori versions, if more than 100 participants are added to a 360 Reviews form to provide feedback, only 100 pieces of the participants’ feedback can be included in the Detailed 360 Report. The included feedback is selected by the system randomly. But for the 360 Fiori version, the subject's feedback will always be included in the Detailed 360 Report.

Views in Detailed 360 Report [page 131]
After a 360 reviews form is fully completed, you can review a detailed 360 report that contains four views. They're Graphical Summary, Gap Analysis, Hidden Strengths and Blind Spots, and Rank.

Configuring Instructions on the Detailed 360 Report [page 133]
You can allow admins to create instructional text for the Detailed 360 Report.

Enabling Rank View in Detailed 360 Report [page 134]
On the Rank view, managers can see employee’s competency ratings from highest first or lowest first to identify employees' strengths and development areas.

Benchmark Ratings [page 135]
A benchmark rating is an average rating of a competency of a job code. Companies can use the benchmark rating to compare an employee's rating against the average rating.

5.1 Views in Detailed 360 Report

After a 360 reviews form is fully completed, you can review a detailed 360 report that contains four views. They're Graphical Summary, Gap Analysis, Hidden Strengths and Blind Spots, and Rank.

Graphical Summary

The *Graphical Summary* view is the default opening view of a detailed 360 report. It provides an overview of ratings broken down by individual raters and categories of raters along with comments given on the ratings.

> **i Note**
>
> In 360 Reviews - SAP Fiori Version, a radar chart is used to display item ratings for competencies under the *Graphical Summary* tab. The chart only shows competency that has at least three rated items.

This view includes the following areas:

- The Overall Rating section (The counterpart in 360 Reviews - SAP Fiori Version is the Overview section.) displays an average rating by each category of raters and all raters. With specific configurations, the section can also display weighted sum rating of all raters, or of all raters except the employee. Minimum and maximum ratings are also available.

  > **i Note**
  >
  > Minimum and maximum ratings aren't available in 360 Reviews - SAP Fiori Version.

- In the Competency and the Goal sections, average ratings of all raters and comments are displayed by sections and items.

Gap Analysis

The *Gap Analysis* view allows you to know if there's a significance difference in the ratings between the two categories of raters.

You can show the Gap Analysis view by going through the following steps:

1. Go to *Admin Center* > *360 Reviews* > *Form Template Settings*.
2. Select or clear *Enable Gap Analysis View from Detailed 360 Report*.
3. Click *Update Form Template*.

Details about the different colors shown in the Gap Analysis view:

There are five possible colors on the gap analysis chart, that is, on the first two columns where you select the two columns to compare. For the actual gap, it's only red or green depending on the direction of the gap. So, for the first two columns the change in color depends on the percentage of the rating in the scale. For example, a rating of 3.45 on a 1–5 scale equals 61.25%, and not directly mapped to ratings (so we can support different rating scales with the same five colors).

Here’s the breakdown of what percentage the rating represents and what color is displayed:

- 25% and under = red
- More than 25% up to and including 41% = orange
- More than 41% up to and including 59% = yellow
- More than 59% up to and including 75% = light green
- Everything else (more than 75% and up) = green

> **Note**
>
> In 360 Reviews - SAP Fiori Version, there're only two colors shown in the *Gap Analysis* view. One is green, which represents positive value; The other is red, which represents negative value.

Hidden Strength and Blind Spot

The Hidden Strengths and Blind Spots view allows you to see whether there’s a significant difference between how employees rate themselves compared with how others rate them. The view includes two sections:

- The Hidden Strength section displays the competency or the goal on which employees rate themselves lower than others rate them by a defined amount.
- The Blind Spot section displays the competency or the goal on which employees rate themselves higher than others rate them by a defined amount.

You can show this view by configuring it in XML form template. Below is a sample configuration.

> **Sample Code**

```
<hidden-strength-threshold>0.0</hidden-strength-threshold>
<blind-spot-threshold>0.0</blind-spot-threshold>
```

Rank

The Rank view allows you to see all competencies or behaviors across all sections.

You can show the Rank view on the report by going through the following steps:

1. Go to *Admin Center* > *360 Reviews* > *Form Template Settings*.
2. Select *Enable Rank View from Detailed 360 Report*.
3. Click *Update Form Template*.

Parent topic: Detailed 360 Report [page 130]

Related Information

Configuring Instructions on the Detailed 360 Report [page 133]
Enabling Rank View in Detailed 360 Report [page 134]
Benchmark Ratings [page 135]

5.2 Configuring Instructions on the Detailed 360 Report

You can allow admins to create instructional text for the Detailed 360 Report.

Context

> **i Note**
>
> - Instructions are only shown on the Graphical Summary View and do not appear on any other view.
> - Instructions are set at the Form Template. This means that admins need to determine how they want to use the report and compose their instructional text before the actual forms are created for their users. We recommend that Professional Services demonstrate this to admins.
> - If instructional text is used, then it will be displayed by default on the Detailed 360 Report. A display option will be available to hide the instructional text if desired by the user.
> - If instructional text is not used, then the instruction section will be invisible, and no option to show/hide will be available. This allows for backwards compatibility for existing customers who do not use this feature.
> - HTML rendering is not supported by the instructional field.

.

Procedure

1. While creating the 360 form template, enter the instructional text in the form xml editor in Provisioning. This text is stored in the `<instruction-sect>` tag in the form xml.

   > **→ 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. Use the template to create a test form and verify that the instructions appear correctly before you create live forms.

Results

The Instructions section shows up on the Detailed 360 Report.

Task overview: Detailed 360 Report [page 130]

Related Information

Views in Detailed 360 Report [page 131]
Enabling Rank View in Detailed 360 Report [page 134]
Benchmark Ratings [page 135]

5.3 Enabling Rank View in Detailed 360 Report

On the Rank view, managers can see employee's competency ratings from highest first or lowest first to identify employees' strengths and development areas.

Context

You can rank competencies or behaviors across sections. The related ratings can be ranked by available rating sources. Ensure that the ranking is numbered to identify the top 5, or top 10 ratings or so on. The report doesn't include the comments in Rank view. Only ratings are displayed on the report.

Procedure

1. Go to the *Admin Center* > *Form Template Settings*.
2. Choose a 360 Reviews form template.
3. Select *Enable Rank View from Detailed 360 Report*.
4. Save your changes.

Results

You can find the Rank view in detailed 360 reports.

Task overview: Detailed 360 Report [page 130]

Related Information

Views in Detailed 360 Report [page 131]
Configuring Instructions on the Detailed 360 Report [page 133]
Benchmark Ratings [page 135]

5.4 Benchmark Ratings

A benchmark rating is an average rating of a competency of a job code. Companies can use the benchmark rating to compare an employee's rating against the average rating.

There's only one benchmark rating per competency per job code. When you apply benchmark ratings to forms, for completed forms, a benchmark rating bar appears in each competency's bar charts in the Graphical Summary and Rank View report.

The benchmark ratings shown in the report are taken from the last benchmark ID that was applied to the form. The benchmark ID is created when a benchmark calculation is completed. It represents the group of each competency's average rating in one benchmark calculation.

How Benchmark Ratings Are Calculated

A benchmark rating is calculated by averaging all ratings for a competency of a job code, including the self-rating. All individual ratings are equally weighted. You can't apply weights to make any individual raters or groups' ratings worth more.

> **Note**
>
> Only completed 360 forms are included for the calculation of benchmark ratings. If there are incomplete 360 forms that fall within the filter criteria, no participant ratings from those reviews are included in the calculation.
>
> The calculation of benchmark ratings is based on job code assignment. So, all individuals within the company who have the same job code (defined in User Directory and set for each employee) have their ratings averaged together. The only way to exclude specific people's ratings from this benchmark is to exclude them from the job code, or not create a form instance for them.

> **Example**
>
> John Doe has a 360 form created for him. Jane Smith also has a 360 form created for her. Both John and Jane have the same job code and are rated on the same five competencies, plus one specific to each of them. The ratings for these forms are as follows:

John Doe's 360 Reviews	Self-Rating	Manager Rating	Rater 1	Rater 2	Rater 3	Rater 4
Competency 1	4	3	4	2	2	1
Competency 2	5	5	4	2	3	3
Competency 3	3	3	3	3	3	3
Competency 4	3	2	4	2	2	1
Competency 5	4	2	3	1	1	1
Competency A	2	2	1	/	/	3

Jane Smith's 360 Reviews	Self-Rating	Manager Rating	Rater 1	Rater 2	Rater 3	Rater 4
Competency 1	4	3	4	2	2	1
Competency 2	5	5	4	2	3	3
Competency 3	3	3	3	3	3	3
Competency 4	3	2	4	2	2	1
Competency 5	4	2	3	1	1	1
Competency B	4	4	5	5	3	3

Competency	Benchmark Rating
Competency 1	2.667
Competency 2	3.667
Competency 3	3
Competency 4	2.333
Competency 5	2
Competency A	2
Competency B	4

i Note

Competencies 1–5 are averaged over 12 distinct ratings, Competency A four distinct ratings, and Competency B six distinct ratings.

Creating Benchmark Ratings [page 137]
To use benchmark ratings in Detailed 360 Report, create benchmark ratings first.

Applying Benchmark Ratings to Forms [page 138]
To use benchmark ratings in Detailed 360 Report, apply the benchmark ratings that you've created to forms.

Parent topic: Detailed 360 Report [page 130]

Related Information

[Views in Detailed 360 Report [page 131]]
[Configuring Instructions on the Detailed 360 Report [page 133]]
[Enabling Rank View in Detailed 360 Report [page 134]]

5.4.1 Creating Benchmark Ratings

To use benchmark ratings in Detailed 360 Report, create benchmark ratings first.

Prerequisites

You're granted the *Calculate 360 Benchmark Ratings* permission.

> **Note**
>
> If your system is using Job Profile Builder, the *Calculate 360 Benchmark Ratings* option isn't available in Role-Based Permissions and Admin Center.

Procedure

1. Go to *Admin Center*, choose *360 Reviews* > *Calculate 360 Benchmark Ratings*.
2. Select the 360 forms for which you want to create benchmark ratings. You can select multiple form templates.
3. (Optional) Select a date range for the start date, due date, and end date of the forms. Use these filters to exclude the forms you don't want to calculate.
4. Choose *Create New Benchmark Ratings*.

   A batch process starts to generate the average ratings for each competency of a job code. You receive an email when the process is complete.

Results

When the benchmark ratings are created, they're given a benchmark ID. The benchmark ratings are stored but aren't automatically applied to the forms.

Task overview: Benchmark Ratings [page 135]

Related Information

Applying Benchmark Ratings to Forms [page 138]

5.4.2 Applying Benchmark Ratings to Forms

To use benchmark ratings in Detailed 360 Report, apply the benchmark ratings that you've created to forms.

Prerequisites

You've created benchmark ratings for the forms that you want to display benchmark ratings. You can only apply the benchmark ratings to the forms that were used to create the benchmark ratings.

Context

A form can support only one benchmark ID at a time to determine the benchmark ratings for comparison. If the form has been used in multiple benchmark calculations, the benchmark ratings from the last benchmark ID are applied to the form.

Procedure

1. Go to *Admin Center*, choose *360 Reviews* > *Calculate 360 Benchmark Ratings*.
2. In the benchmark ID section, choose *Apply Benchmark To Forms*.

   "Benchmark has been applied to forms" is reminded under the benchmark calculation information.

Next Steps

If you want to know which forms were included in a benchmark calculation, choose *Download Benchmark Data* to get the benchmark calculation information, including form ID and benchmark ID.

If needed, you can delete an existing benchmark ID by choosing *Delete Benchmark*. If you delete the benchmark ID that is in use, those forms that are using the benchmark ID no longer display benchmark ratings in Detailed 360 Report.

Task overview: Benchmark Ratings [page 135]

Related Information

Creating Benchmark Ratings [page 137]

6 Ad Hoc Reporting for 360 Multi-Rater Subjects

You can create *360 Multi-Rater Subject* domain ad-hoc reports to track the 360 review feedback for employees. The Ad Hoc Reports can provide you details about the employees (subjects), their reviewers (participants), and the feedback the employees receive on competencies, behaviors, goals, and performance, and so on.

For more information on setting up ad hoc reporting, refer to the Implementing Ad Hoc Reporting guide.

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

Reporting Participant Names When Form is Anonymous:

Ad Hoc Reporting does not display participant names when the 360 form is anonymous. If you want to report the participant names for anonymous forms, you can create a *Anonymous 360 Status* spreadsheet report which helps you find out how many 360 forms are still in progress, which participants have not completed their reivews yet and how many forms they still need to complete.

How to create *Anonymous 360 Status* spreadsheet report

1. **Enable the *Anonymous 360 Status Report* in your system**
   Go to *Provisioning* > *Company Settings* and select *Import all Standard RDFs* . Then save the change and log out from Provisioning. Next, go back to Provisioning, choose *Import/Update/Export RDFs* > *Anonymous 360 Status Report* and click *Save Changes*.

   > → 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. **Obtain the *Anonymous 360 Status Report* role-based permission**
   Admins go to *Admin Center* > *Manage Permission Roles* > *User Permissions* > *Reports Permission* > *Spreadsheet Report Privilege* > *Other* and grant users the *Anonymous 360 Status Report* permission.
3. **Run the *Anonymous 360 Status Report***
   Navigate to *Admin Center* > *Reporting* > *Switch to Classic Reporting* > *Spreadsheet Reports* and choose *Anonymous 360 Status Report* .

6.1 Creating 360 Multi-Rater Ad Hoc Report

You can generate ad hoc reports on 360 Reviews.

Procedure

1. Launch the application, and go to the *Reporting* module.
2. Click the *Analytics* tab, and under *Reports*, click *Ad Hoc Reports*.
3. Click *Create New Report*.
4. For the *Report Type* field, select *Single Domain Report*.
5. From the *Report Definition Type* dropdown, select *360 Multi-Rater 360*.
6. Click *Create*.
7. Under the *General Info* tab, enter *Report Name*, *Description*, and set the *Report Priority*.
8. To include the employees to be considered while generating the report, click the *People* tab, and under *Define Report Scope*, click *Refine Criteria*.
9. In the *Define Team* dialog box, select *Team Manager*, select *Team Reporting Type* and click *OK*.
10. Go to the *Data Sets* tab, click *Select Template*, select the 360 template, and click *OK*.
11. Then, to configure the fields that you need in your ad hoc report, click the *Columns* tab.
12. In the *Edit Columns* section, click *Select Columns*. The *Select Columns* dialog box appears.

    > **i Note**
    >
    > To improve performance, a *Participant Feedback Status (New)* column is introduced. The difference between the *Participant Feedback Status (New)* column and the existing *Participant Feedback Status* column is as follows:
    >
    > - The *Participant Feedback Status* column contains different feedback statuses including **Declined** and **Passive Declined**. **Declined** means that participants decline to modify the form, while **Passive Declined** means that the form is declined by the Auto Route Job in the system.
    > - In the *Participant Feedback Status (New)* column, however, there is no *Passive Declined* status, and the *Declined* status contains the data of both active decline by participants and passive decline by the Auto Route Job.

13. Select the columns you need in your report.
14. Under the *Filter* tab, click *Refine Criteria*, select filters as follows:
    a. Select a filter. The filter definition dialog appears.
    b. Use either the *By My Selection* tab or the *By Rule* tab, and complete the definition.
    c. Click *Done*.
15. Click *Save*.
16. Click *Preview* to check whether the report generates all the information you need.

Results

You have successfully created your ad hoc report.

> **Note**
>
> When creating rating scales for 360 Reviews forms, you can configure rating descriptions in your own language. However, in ad hoc reports, the system doesn't support localizing rating descriptions in the language you've configured before, but showing the default language of rating scales.
>
> Overall ratings may be displayed differently in 360 Reviews forms, Detailed 360 reports, and ad hoc reports. This is because the number of decimal places are configured differently in forms, detailed reports, and ad hoc reports. Also, in detailed reports, the "All" rating is the average rating of all raters except the employee self.

7 Mobile 360 Reviews

7.1 Enabling Mobile 360 Reviews

This section discusses how to enable Mobile 360 Reviews.

Context

To enable Mobile 360 Reviews, perform the following:

Procedure

1. Enable *360 Multi-Rater* 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.

2. Go to *Admin Center* > *Enable Mobile Features*, and on the *Mobile Settings* page, select *360 Multi-Rater* under *Talent* Module.

Results

Mobile 360 Reviews feature has been successfully enabled on your mobile device.

7.2 Mobile 360 Reviews Feature Support

This section lists out the features supported by Mobile 360 Reviews.

There are four kinds of Mobile status regarding Mobile 360 Review features:

- **Supported**: This feature is available for Mobile 360 Reviews.
- **Partially Supported**: This feature is available for Mobile 360 Reviews, but there is a gap between Mobile and desktop applications.

- **Not Supported**: This feature is not available for Mobile 360 Reviews, and not included in the roadmap plan either.
- **Planned**: This feature is not currently available for Mobile 360 Reviews, but has been included in the road map plan.

Supported Operating Systems

SAP SuccessFactors Mobile APP	Mobile Status
iOS (iPhone and iPad)	Supported
Android	Supported

Use Case

360 Use Case	Mobile Status
Raters provide feedback for an employee	Supported
360 Evaluation Form is created by choosing Raters, Competencies/Objectives etc.	Planned
Summary of the Evaluations	Planned

360 Form Sections

360 Form Sections	Mobile Status	Notes
Performance Goal/Objective	Partially Supported	See **Performance Goal/Objective Section** below for details
Competency	Partially Supported	See **Competency Section** below for details
Development Goal/Objective	Partially Supported	See **Development Goal/Objective Section** below for details
Summary	Partially Supported	See **Summary Section** below for details
Rater Section	Planned	
Custom	Supported	
Signature	Not Supported	
Introduction	Not Supported	
Review Information	Not Supported	

360 Form Sections	Mobile Status	Notes
User Information	Not Supported	
Job Description	Not Supported	

Route Map Stages

Route Map Stage	Mobile Status	Notes
Modify	Planned	
Evaluation	Supported	
Signature	Not Supported	
Completion	Not Supported	

Roles

All Roles are supported.

Rating Option

Only `Rating Option= 0` is supported.

Rating Scale

Rating Scale	Mobile Status	Notes
Circle icon scale	Supported	• Only circle icon is supported on mobile • If the value of the scale is more than 5, all scales are displayed in a dropdown
• 1-3 • 1-5 • 1-7 • Build your own	Supported	Without numeric rating values, all scales are displayed in a dropdown

Required Fields

Required Fields	Mobile Status	Notes
Required Fields	Partially Supported	Required field validation on submission is supported, but currently it is not possible to show the user if the **Overall Manual Rating** in the Summary section is required.

Character Limits

Character Limits	Mobile Status	Notes
Comments Fields	Partially Supported	Character limit validation on submission is supported but it is not currently possible to show the user if they are under or over the character limit settings in real-time.

Performance Goal/Objective Section

Performance Goal Section	Mobile Status	Notes
View Performance Goal	Partially Supported	View name and metric field only
Performance Goal Rating	Supported	View and Edit
Performance Goal Rating Scale Description	Supported	
Performance Goal Comments	Partially Supported	• View & edit • Plain text only. See **Rich Text Editor** section below for RTE expected behaviors.
Section Introduction	Partially Supported	Plain text only. See **Rich Text Editor** section below for RTE expected behaviors.
Performance Goal section comment	Partially Supported	Plain text only. See **Rich Text Editor** section below for RTE expected behaviors.
Add Performance Goal	Supported	
Edit Performance Goal	Supported	
Delete Performance Goal	Supported	
Custom Elements	Not Supported	

Development Goal/Objective Section

Performance Goal Section	Mobile Status	Notes
View Development Goal	Partially Supported	View name and metric field only
Development Goal Rating	Supported	View and Edit
Development Goal Rating Scale Description	Supported	
Development Goal Comments	Partially Supported	• View & edit • Plain text only. See **Rich Text Editor** section below for RTE expected behaviors.
Section Introduction	Partially Supported	Plain text only. See **Rich Text Editor** section below for RTE expected behaviors.
Development Goal section comment	Partially Supported	Plain text only. See **Rich Text Editor** section below for RTE expected behaviors.
Add Development Goal	Supported	
Edit Development Goal	Supported	
Delete Development Goal	Supported	
Custom Elements	Not Supported	

Competency Section

Competency Section	Mobile Status	Notes
View Competency	Partially Supported	View name, weight, and description only
Competency Rating	Supported	View and Edit
Competency Rating Scale Description	Supported	
Competency Comments	Partially Supported	• View and edit • Plain text only. See **Rich Text Editor** section below for RTE expected behaviors.
Section Introduction	Partially Supported	Plain text only. See **Rich Text Editor** section below for RTE expected behaviors.
Competency section comment	Partially Supported	Plain text only. See **Rich Text Editor** section below for RTE expected behaviors
Competency Behaviors	Partially Supported	You can view competency behaviors. In addition to that, you can also comment on and rate each behavior, and edit the rating and comment later.
Add Competency	Planned	

Competency Section	Mobile Status	Notes
Delete Competency	Planned	
Custom Elements	Not Supported	

Summary Section

Summary Section	Mobile Status	Notes
Calculated Rating	Supported	
Adjusted Calculated Rating	Supported	
Overall Manual Rating	Partially Supported	Required field validation on submission is supported, but currently it is not possible to show the user if this field is required
Introduction	Partially Supported	Plain text only. See **Rich Text Editor** section below for RTE expected behaviors
Comment	Supported	Plain text only. See **Rich Text Editor** section below for RTE expected behaviors
Summary section table	Not Supported	

Other Features

Other Features	Mobile Status	Notes
EZ-Rater	Not Supported	

Rich Text Editor (Not supported)

Rich Text Editor (RTE) or text formatted with an RTE is not currently supported in Mobile 360 Reviews

If you are using RTE for comment fields, please be aware of the following impacts:

- If text is formatted using RTE on the web, and then edited in the Mobile application, the formatting will be lost in both the web and Mobile applications. Only HTML tags will be visible.
- If text if formatted using RTE on the web , and then viewed in the Mobile application, the text will be displayed without any formatting.

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.

> **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 Using the Check Tool to Solve Issues

Get an overview of potential problems and errors in your configuration that you can try to solve yourself before you contact Product Support about an issue.

Prerequisites

- You've enabled the Metadata Framework.
- You have the following *Administrator Permissions* > *Check Tool* permissions:
  - *Access Check Tool* authorizes users to access the tool.
  - *Allow Configuration Export* authorizes users to attach configuration information to a ticket.
  - *Allow Check Tool Quick Fix* authorizes users to run quick fixes for the checks that have this feature. A quick fix can be used to immediately correct any issues found by that check.

  For more information about role-based permissions, refer to List of Role-Based Permissions.

> → Tip
>
> Refer to Guided Answers for the Check Tool for a guided navigation through the available check tool checks and more information on each check.

Context

The check tool provides an overview of the issues found in the system. New checks that are being added in a new release go through a first initial run to return a result. After the initial run, checks are run on a regular basis (at least monthly). We recommend you open the check tool after the upgrade to a new release to see if issues have been found by new checks.

In addition to these runs performed by the system, you can also run individual checks after you made changes to the system, for example, after updating data models or picklists. For more information, refer to the application-specific documentation.

Procedure

1. Go to *Admin Center* > *Check Tool*.

   The *Check Tool* page opens displaying the results of the first tab **System Health**.
2. Depending on the check type of the check you're interested in, select the corresponding tab.

Tab	Description
System Health	Displays configuration checks that have returned errors or warnings after the last run. We recommend you solve these in a timely manner. To display all checks, select all result types in the *Result Type* search filter and select *Go*.
Migration	Displays the migrations that are still pending, either because the check tool couldn't automatically migrate all issues or because new issues have been found after the last run. We recommend you solve these in a timely manner. To display all checks, turn on the *Show completed migrations also* search filter and select *Go*.
Validation	Displays a list of all validation checks. **i Note** Validation checks require one or more parameters for execution, therefore we can't run these checks automatically. You need to enter input parameters and run the corresponding check manually to get results.

3. To solve a check that returned issues, click on it.

   The detail view opens to the right side of the screen with more information on the check and on how to solve the issue.
4. Evaluate the results and resolve the issues. If the check provides a quick fix that you can use to immediately correct issues found during a check run, select the *Quick Fix* button.
5. If you encounter an error you can't resolve, contact Product Support by creating a ticket.

Next Steps

To verify that you've solved the underlying issue, select the checkbox for the corresponding checks and choose *Run Checks*. You can also wait until the next automatic run to see if the issue has been solved.

> **i Note**
>
> If the check you selected requires one or more prechecks (checks that need to be run successfully first), the prechecks are run first even if you haven't selected them.

Related Information

Running Checks [page 153]

Using the Quick Fix Feature [page 158]

9.1 Benefits of the Check Tool

The SAP SuccessFactors check tool helps you identify and resolve issues when your system doesn't work as you expect.

If your SAP SuccessFactors applications are behaving in unexpected ways, it is likely that it has a configuration or data conflict: you have some data that is inconsistent or a configuration error. The check tool quickly identifies these types of problems so that you can avoid support tickets. You might still need to create a support ticket if the problem is severe, but even in severe cases, the check tool can save you time because it can export the results of the check and your configuration for Product Support. The support engineer, therefore, can identify the issue more quickly.

When you open the check tool, you see:

- A list of issues in your configuration or data and the severity of each issue.
- A solution or recommendation to address the issue.

9.2 Running Checks

Trigger the execution of individual checks to find potential issues in the system, or to check if an issue has been solved in the meantime.

Prerequisites

- You've enabled the Metadata Framework.
- You have the following *Administrator Permissions* > *Check Tool* permissions:
  - *Access Check Tool*
  - *Allow Configuration Export*
  - *Allow Check Tool Quick Fix*

Context

In addition to the job runs performed automatically by the system, you can also run individual checks. For example:

- You want to check if the issue has been solved.
- You want to run a check as a prerequisite or post-step of a task. For example, you made changes to the system (such as updating data models or picklists), and you want to verify your changes didn't cause any new issues. For more information, refer to the application-specific documentation.

- Validation checks need to be run manually as they require input parameters.

Procedure

1. Go to *Admin Center* > *Check Tool*.

   The *Check Tool* page opens displaying the results of the first tab *System Health*.
2. Depending on the check type of the check you want to perform, select the corresponding tab.

   A list of checks is displayed in the results table according to the predefined selection criteria.
3. **Optional:** If the check you're searching for is not listed in the results table, adjust the selection criteria and choose *Go*.

   You get a list of checks that fulfill the selection criteria you've entered.
4. Select the corresponding checks, and choose *Run Checks* from the top right of the results table.

   > **i Note**
   >
   > Please note that for checks on the *Validation* tab, you can only select one row at a time. Execution of multiple checks at once is not possible.
   >
   > Also, for validation checks you need to enter the required input parameters when running a check.

   > **i Note**
   >
   > If the check you selected requires one or more prechecks (checks that need to be run successfully first), the prechecks are run first even if you haven't selected them.

   The *Results* column displays any issues found.

Next Steps

Investigate and solve the underlying issue.

9.3 Check Types

Overview of the different check types and their purpose.

The check type groups those checks that have a common purpose. On the *Check Tool* page, each tab represents a check type.

Overview of Check Types

Check Type	Description	Automatic Job Runs
System Health	Checks that run without parameters and check configuration and data issues that need to be fixed. The predefined selection criteria displays only those that have returned errors or warnings after the last run. We recommend you solve these in a timely manner. To display all checks, select all result types in the **Result Type** search filter and select *Go*.	• Automatic initial run at the beginning of a new release • Periodic runs (usually monthly)
Migration	Checks that perform an automatic migration of features. When you open the page, only pending migrations are displayed. To display also the competed migrations, turn on the *Show completed migrations also* search filter and select *Go*.	• Automatic initial run at the beginning of a new release • Periodic runs (usually monthly)
Validation	Checks which need one or more parameters for execution, for example: • A specific template • A specific user • A specific time frame Validation checks can be triggered by single selection and choosing the *Run* button. A popup appears with input fields for the parameters. Execution of multiple checks at once is not possible.	Only triggered through user

9.4 Check Results

After you run checks in the check tool, it returns the results of the check so that you can resolve issues that it found.

The results of a check are displayed in the *Result* column. If you run the checks multiple times to see how you're resolving issues, you can select a previous result from the *History* dropdown list.

> **Note**
>
> To display the *History* dropdown list, click on a check. On the details screen that opens on the right side of the page, expand the header. The *History* dropdown list is directly below the check title.

Possible Results of Check Tool

Result	Action
No issues found	If the tool can't find issues, you see a green check mark in the *Result* column.
Issues found	If the tool finds issues, it reports the number of issues and a yellow warning icon or a red alarm icon. • The yellow icon indicates a low severity issue. The system proposes a solution. • The red icon indicates a high severity issue. You must take action, which could include creating a support ticket.
Pending migrations	If the tool finds pending migrations that need to be completed by the user, you can see a yellow warning icon or a red alarm icon in the *Status* column on the *Migration* tab.
Completed	If the tool finds no issues with migration, or the migration has already been completed, you see a green check mark in the *Status* column on the *Migration* tab.

> **i Note**
>
> - Select the *Export Results* button to download the check results. Ensure you run the check before exporting the check results. If not you can view only the first 100 check results.
> - The downloaded check result table can display a maximum number of 10,000 rows.

Related Information

Creating Product Support Tickets from the Check Tool [page 156]

9.5 Creating Product Support Tickets from the Check Tool

When the check tool reports a serious issue that you can't solve, you might need to contact Product Support. You can create a support ticket from within the check tool.

Prerequisites

You've run the check tool. You can find the check tool by going to *Admin Center* > *Check Tool*. You create the ticket from the details page of the tool.

Procedure

1. Click on the check you can't solve.

   The detail view opens to the right side of the screen with more information on the check and on how to solve the issue.
2. On the *Result* tab, scroll down to the results table to look for the errors you want to report on.

   You usually contact Product Support for high severity issues not low severity issues.
3. On the *Check Information* tab, under *Need Assistance?*, copy the component ID.

   For example, LOD-SF-EC is the component ID for Employee Central.
4. Create a customer incident in the relevant category.
5. When you create the ticket, paste the component ID into the ticket.

9.6 Exporting Configuration Information

Export the configuration information from your system and attach it to the Support ticket created from the check tool. This information can help Support identify the issue of a check you can't solve yourself.

Prerequisites

You have the *Administrator Permissions* > *Check Tool* > *Allow Configuration Export* permission.

Context

> **Note**
>
> Not all applications have this feature enabled.

Procedure

1. Go to *Admin Center* > *Check Tool*.

   The *Check Tool* page opens.
2. In the top-right corner, select *Use legacy Check Tool UI*.

   The legacy check tool UI opens with a list of all applications for which you can use the check tool.

3. Select the corresponding application.

   If the application has the export configuration feature enabled, you can see an information message at the bottom of the page with a link.
4. Choose the *Export Configuration* link in the information message.

Results

The system downloads a file with the configuration information for the application you've selected.

Next Steps

Attach the downloaded file to the Support ticket you created from the check tool.

9.7 Using the Quick Fix Feature

The check tool includes a quick fix feature that you can use to immediately correct issues found during a check run.

Prerequisites

The checks which you want to solve with a quick fix have run and provide a check result with error or warning.

Procedure

1. Go to *Admin Center* > *Check Tool*.

   The **Check Tool** page opens.
2. Click on the corresponding check you want to fix.

   The details screen opens on the right side of the page with more information about the check. If the check includes a quick fix, the *Quick Fix* button is displayed on the *Result* tab, under *Proposed Solution*.
3. Choose *Quick Fix* to start fixing the issue.

   A third screen opens to the right side, with step 1, called *Select Correction*, that shows one or more corrections for the issue.
4. Select the correction you want to carry out and choose *Step 2* to proceed to *Final Approval*.

   In the *Final Approval* step, you can opt to change your mind and not carry out the fix.

5. If you want to proceed, choose *Step 3*.

   The system confirms that the fix is now running.
6. Choose *Close* to complete the procedure.

   The system verifies that the fix has run correctly after a short time by running the check again.

9.8 Exporting a List of All Checks

Get an overview of all checks available in the system by exporting a CSV file.

Procedure

1. Go to *Admin Center* > *Check Tool*.

   The *Check Tool* page opens.
2. In the top-right corner, select *Export all checks*.

   A CSV file with all checks available in the system is downloaded, including check descriptions and application area.

   > **i Note**
   >
   > The list includes also checks that you can't access from the user interface if you don't have the corresponding applications set up, or if you lack the required permissions.

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