SAP SuccessFactors

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Implementing and Managing Performance Management

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Content

Change History

Learn about changes to the documentation for Performance Management in recent releases.

1H 2023

Type of Change	Description	More Info
May 19, 2023		
Changed	We specified that the Edit Introduction Texts step is available only when you se-lect Now as the launch date.	Editing Custom Sections and Custom Fields When Launching Forms Now [page 258]
April 21, 2023		
New	You can now disable the *Review Your Performance* and *Review Employee Performance* home page cards, so we up-dated the prerequisites for showing these cards.	Performance Management on the Latest Home Page [page 292]
New	You can now enable participants of a performance review to view the employ-ee's Growth Portfolio through links on the form.	Adding Growth Portfolio Links to Forms [page 299]
New	You can now enable automatic daily fix-ing of the Document Transfer and Change Engine issues caused by RBP refresh fail-ures.	Enabling Automatic Fixing of Document Transfer and Change Engine Issues Caused by RBP Refresh Failures [page 200]
Added	We added information to clarify the re-ports users see in Team Overview.	Team Overview [page 230]
Added	We added a recommendation that in each performance review cycle, you create a new goal plan and link the new one to forms.	Goal Section [page 47]
Added	We added feature differences in Perform-ance Management when you use Talent Intelligence Hub.	Managing Competencies [page 17] Adding Custom Competencies [page 120] Competency Section [page 61] Competency Section (competency-sect) [page 113] Reporting for Performance Reviews [page 293]

Type of Change	Description	More Info
Added	We added a note that with Rating Option 3, people who're invited to give ratings and comments on forms can give comments only.	Enabling Get Feedback [page 216]
Added	We added several screenshots of rating fields in employee, manager, and matrix manager's views.	Rating Options [page 51]
Added	We added more information about importing overall scores, including use cases, column descriptions and examples.	Importing Overall Scores [page 273]
Changed	We clarified it is a copy of completed forms that is sent to new manager's Completed folder when you use the *Automatic Completed Document Copy to New Manager* option in the *Transfer Forms to New Manager* admin tool.	Transferring Forms to New Manager [page 196]
Changed	We removed a list of custom roles that are used only in Recruiting.	Roles [page 32]

2H 2022

Type of Change	Description	More Info
January 20, 2023		
Added	We added a note about the permission validation for deleting goals from the form when auto-sync is enabled.	Auto-Populate and Auto-Sync [page 58] Including Goals from Goal Plan into Goal Section [page 110] Goal Section [page 47]
Added	We added a section to explain the messages that can appear in the *Feedback from Others* column in *Team Overview*.	Ask for Feedback [page 176]
December 9, 2022		
Changed	We modified the descriptions for Change Engine actions *Auto complete old forms* and *Keep forms with old manager* to make them more specific and understandable.	Configuring Change Engine Rules [page 185]
November 11, 2022		
Added	We added information that the new confirmation message popup for sending forms includes replaceable labels.	Form Template Settings [page 38]

Type of Change	Description	More Info
Added	We added information about the scheduled job needed to automatically send the form to the next step on the due date.	Creating a Route Map [page 26]
Added	We added information about the scheduled job needed to set up consolidated email notifications for form templates.	Customizing Email Notification Settings for Form Templates [page 208]
Added	We added information about the potential problem with gap analysis when you create a rating scale with a lot of levels.	Creating a Rating Scale [page 24]
October 28, 2022		
New	You can now select *Enable New Confirmation Experience for Sending Forms* in *Form Template Settings* to enable a confirmation message box for sending forms.	Form Template Settings [page 38]
New	You can now enable the person-based Performance History block to show employees' performance review data from multiple employments.	Enabling Person-Based Performance History Block [page 282]
Added	We added a note that the SMART Goal Wizard is not available in forms if you're using the latest Goal Management.	Form Template Settings [page 38]
Updated	We replaced an old topic with a centralized home page topic where you can find information about performance review tasks on the latest home page.	Performance Management on the Latest Home Page [page 292]
Updated	We corrected information by removing a note: The permissions that you configure will not apply to in-progress forms. Actually, the permissions configured apply to in-progress forms.	Configuring Permissions to Mass Route Forms [page 103]
Updated	We specified the permissions required for launching forms should be enabled in *Manage Permission Roles*.	Launching Forms [page 256]
Updated	We adjusted the sequence of prerequisites to follow the configuration process.	Configuring Change Engine Rules [page 185]
Updated	We updated the source for downloading DTD files.	DTD for Form Templates [page 96]

1 Overview of Performance Management

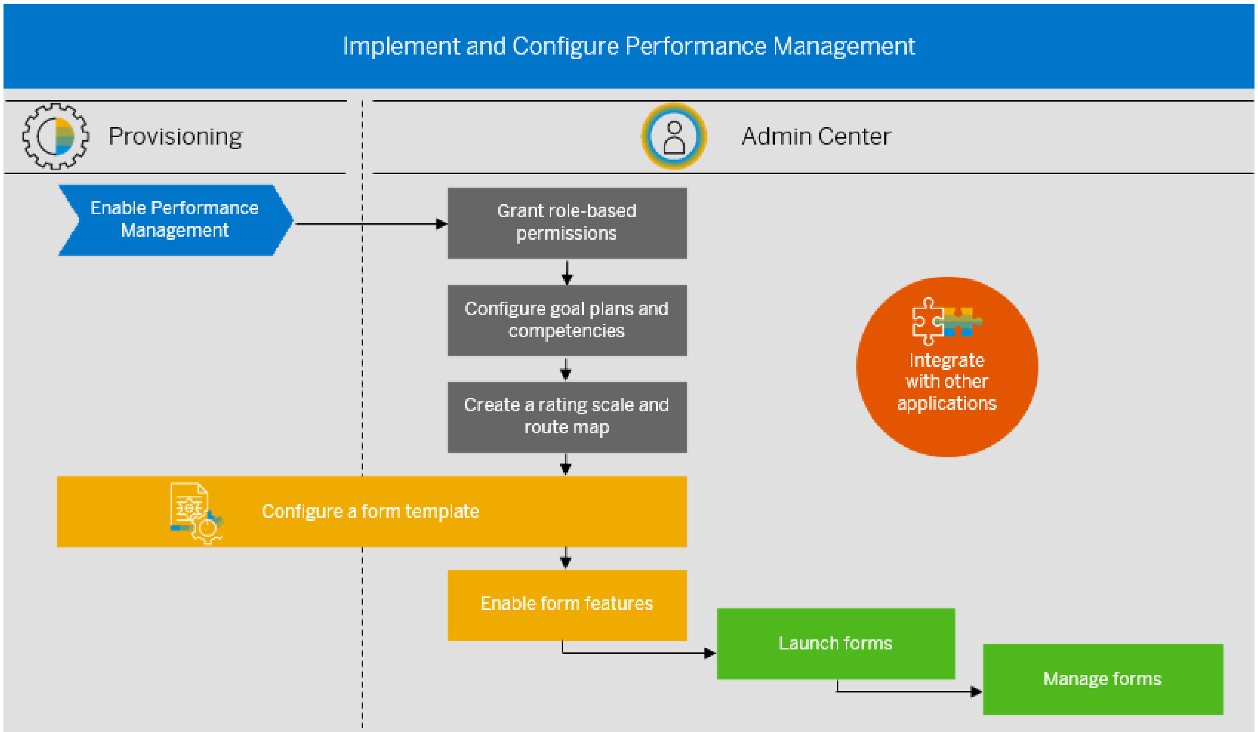
SAP SuccessFactors Performance Management is part of the SAP SuccessFactors Performance & Goals bundle of applications. Using Performance Management, employees and managers work together to assess employees' work performance, including their goal achievements and competencies.

Basic Concepts in Performance Management

- Form
  In a performance review cycle, employees and managers use an online form, that is, Performance Management form to give ratings and comments on employees' goals and competencies. The form consists of several sections with configured features. For example,
  - A goal section that shows employees' goals from their goal plan
  - A competency section that shows employees' competencies by their job code
  - A summary section that lists the rating of each goal and competency as well as overall form rating
- Form Template
  Performance Management forms are created based on a form template. Before the forms are in use, the form template needs to be configured. It's used to define form settings, for example,
  - Form title and description
  - Associated route map and rating scale
  - Fields and sections
  - Form permissions
- Route Map
  When employees and managers do a performance review, each role gives ratings and comments in a single step. When they finish their step, they route the form to the next step until the form is completed. A route map establishes the steps and roles that are involved in a performance review.

Process of Implementing and Configuring Performance Management

Following is the process of how you can implement and configure Performance Management.



- Enabling Performance Management in Provisioning [page 13]
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- Managing Forms [page 261]
- Integrating with Other Applications [page 276]
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2 Enabling Performance Management in Provisioning

Enable Performance Management in Provisioning so that users can access Performance Management in their instance.

Prerequisites

You have access to 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. In Provisioning, select a company.
2. Under *Edit Company Settings*, select *Company Settings*.
3. Select *Performance Management*.

   Now, users can access Performance Management through the Performance tab in the instance. Note that if you enable *360 Multi-Rater* or *Succession Planning* instead of *Performance Management* in Provisioning, the tab is also visible to users but Performance Management features are not available.
4. Select *Workflow*.

   Now, the route maps feature can be used to establish the steps and roles that are involved in a performance review.
5. Optional: Select *Stack Ranker for Performance Management* to use the Stack Ranker feature.

3 Role-Based Permissions for Performance Management

When you set up Performance Management, it's important to grant role-based permissions (RBP) to right people. You can identify user groups, for each of which you can create individual roles, and then grant permissions to those roles. Users who change roles or positions within your organization automatically lose or inherit permissions.

With RBP, you can manage the permissions for Performance Management flexibly. For example, you can grant only to HR the permission to create rating scales, or only allow managers to hide or unhide a form from employees without deleting it.

To see a full list of the RBP for Performance Management, refer to List of Role-Based Permissions by using filters and key words.

Related Information

List of Role-Based Permissions

3.1 Restricting Access to Performance Management

You can grant an access permission to certain users, so that other users are restricted from accessing the Performance tab.

Prerequisites

You have the permission of *Performance Management Feature Settings* under *Manage System Properties*.

Context

> **Note**
>
> If users have forms in their form Inbox, though they don't have the access permission, they can access the Performance tab. When all the forms are deleted, they can no longer access it.

Procedure

1. In Admin Center, go to *Performance Management Feature Settings* and select *Enable Performance Management Access Permission*.

> **i Note**
>
> As an implementation partner or Product Support, you can choose to select the option in *Company Settings* in Provisioning.

2. Go to *Manage Permission Roles* and grant the permission of *Performance Management Access* under *Performance* to selected roles.

4 Preparations for Configuring Form Templates

Before configuring a form template, you need to configure goal plans and competencies, and create a rating scale and route map.

Configuring Goal Plans [page 16]
A Performance Management form can be linked to a goal plan. Before configuring a form template, you need to configure a goal plan so that goals in the goal plan can be populated and synced on the form.

Managing Competencies [page 17]
In performance reviews, managers and employees can review employees' competencies to evaluate how well employees have fulfilled their organization-wide and job-specific requirements. Before configuring a form template, you need to manage competencies that can be used in competency sections in Performance Management forms.

Rating Scales [page 23]
A rating scale is a tool used in Performance Management forms with which the reviewer assigns a score to the employee as a measure of performance.

Route Maps [page 25]
A route map establishes the steps and roles that are involved in a performance review. Each role on the route map gives ratings and comments in a step and then routes the form forward until it's completed.

4.1 Configuring Goal Plans

A Performance Management form can be linked to a goal plan. Before configuring a form template, you need to configure a goal plan so that goals in the goal plan can be populated and synced on the form.

For more information on configuring goal plans, see the implementation guide of Goal Management.

Related Information

Goal Management Overview

4.2 Managing Competencies

In performance reviews, managers and employees can review employees' competencies to evaluate how well employees have fulfilled their organization-wide and job-specific requirements. Before configuring a form template, you need to manage competencies that can be used in competency sections in Performance Management forms.

SAP SuccessFactors offers you three frameworks to manage competencies:

- Job Description Manager: You manage competencies in the *Manage Competencies* admin tool.
- Center of Capabilities: You manage competencies in the *Manage Center of Capabilities* admin tool.
- Talent Intelligence Hub: You manage competencies in the *Manage Talent Intelligence Hub* admin tool.

> **Note**
>
> Job Description Manager is a legacy framework for managing competencies, while Talent Intelligence Hub is the latest one.

> **Note**
>
> Talent Intelligence Hub is in the early adoption phase and is available only for customers who have enabled Job Description Manager or Job Profile Builder.
>
> - If you're using Job Description Manager, you can upgrade to Talent Intelligence Hub using *Admin Center* > *Upgrade Center*. For more information, refer to **Migrating from Job Description Manager to Talent Intelligence Hub** in the **Related Information** section.
> - If you're using Job Profile Builder, you can upgrade to Talent Intelligence Hub using *Admin Center* > *Upgrade Center*. For more information, refer to **Migrating from Job Profile Builder to Talent Intelligence Hub** in the **Related Information** section.

After you create competencies, you also need to map the competencies to job roles so that they can be populated or added to forms.

- If Job Description Manager is enabled, use the *Families and Roles* admin tool.
- If Job Profile Builder is enabled, use the *Manage Job Profile Content* admin tool.

Related Information

Competency Section [page 61]
Competency Section (competency-sect) [page 113]
Center of Capabilities
What is Job Profile Builder?
Talent Intelligence Hub
Migrating from Job Description Manager to Talent Intelligence Hub
Migrating from Job Profile Builder to Talent Intelligence Hub

4.2.1 Managing Competencies in Job Description Manager

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

Procedure

1. Go to *Admin Center*, and in the tools search field, search for *Manage Competencies*.

   The *Competency Libraries List* opens. You can create a new competency library from this page.
2. Click *Add New Library* > *Choose from SuccessStore*.
3. Choose a library that you would like to add, then click *Add to My Instance*.
4. When the competency library is loaded, click the library and then click any competency then begin editing the key details. They are:

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

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

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

   > **i Note**
   >
   > If the **Core** flag is set in *Manage Templates,* users must also mark competencies as core in the Manage Competencies tool, otherwise this section will be blank for your users.
6. Under *Performance Details* click the text to update the tone and voice that you want to change.
7. When you have finished updating the text, click *Save*.

Results

You have created a new competency library.

4.2.1.1 Editing Competencies

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

Prerequisites

You have created a competency library in your instance.

Context

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

Procedure

1. Go to *Admin Center*, and in the tools search field, search for *Manage Competencies*.

   The *Competency Libraries List* opens. You can create a new competency library from this page.
2. On the *Competency Library List* screen, select the competency to edit.
3. Within the competency, edit any of the following: *Name*, *Category*, *Description*, *Performance Details*, *Core Settings Job Role Assignments*, *Status*, or *Assigned Behaviors*.

   > **i Note**
   >
   > It is recommended to use plain text in the *Description* field.

Results

You have successfully edited your competency on the *Competency Libraries List*.

4.2.1.2 Modifying Performance Details

Performance details are short but specific statements that describe actions, attitudes, or skills that demonstrate proficiency in the competency. You can move, delete, edit or create a performance detail on the *Performance Details* tab.

Prerequisites

You have created a competency library in your instance.

Context

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

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

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

- Follows through with customers
- Gets customer feedback

Procedure

1. Go to *Admin Center*, and in the tools search field, search for *Manage Competencies*.

   The *Competency Libraries List* opens. You can create a new competency library from this page.
2. On the *Competency Library List* screen, select the competency to modify.
3. To move performance details to another performance level, select checkbox next to the *Performance Detail* and then click *Move Selected To...*. Select the performance level from the dropdown menu.
4. To delete a performance detail, select checkbox next to the a performance detail and then click *Delete Selected*. Click *Yes* to confirm deletion.
5. To edit a performance detail, click the teaser text. Edit the performance detail as necessary and then click *OK* to save. Click *Save* within the competency to save all changes.
6. To create a new performance detail, click the competency to edit. On the *Performance Detail* tab, click *Take Action* in the performance level where the new performance detail is desired, and then select *Add Teaser*.

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

Results

You have successfully modified performance details of a competency.

4.2.1.3 Adding a New Competency

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

Procedure

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

     > **i Note**
     >
     > It cannot be edited in this page. To edit this, you can export the competency, update the locale and re-import.

     > **i Note**
     >
     > Make sure that the language of a competency and the related category is consistent with the language of a Performance Management form template. Otherwise, the competency and category aren't available when you add competencies in the template.
   - Category: You must place each competency within a category. Use this category tag to both organize your competency library as well as filter competency sections of forms.
   - GUID: Global Unified Identifier is the unique alpha numeric value you have assigned to tag or identify your competency. If you have multiple locales, this unique number is what ties them together as being the same competency in different languages.
     For example, if the customer is located in Canada each competency must exist in both English (en-us) and French (fr_ca). As an admin you should create competencies for Customer Focus in each language:
     - Locale=en-us Customer Focus GUID: 7 ID: 7-Eng
     - Locale=fr-ca L'orientation cClient GUID: 7 ID: 7-Fr

     > **i Note**
     >
     > The ID is slightly different, but the GUID is the same for each version. As a result, the French language version is pulled into the performance forms of French speaking employees, and the English language version is pulled into the performance forms of English-speaking employees.

- Status: Each competency can have a status of Read Only, Editable or Hidden, which you choose when you create the competency. A Read Only status defines that you can read a competency but you cannot edit a competency. An Editable status defines that you can edit a competency. A Hidden status defines that end users can add the competency to a form or not.
- Core: Selecting "Yes" designates the competency as "Core" competency. If desired, you can configure the performance form template so that core competencies are dynamically pulled into the performance form for each employee.
- Description

5. Click *Save*.

Results

You have successfully added a new competency.

4.2.1.4 Adding a New Competency Category

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

Context

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

Procedure

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

4.2.1.5 Modifying Competencies using the Actions Menu

You can manage competencies by going into the competency itself, or change competencies using the *Actions* menu within the competency library.

Context

To modify Competencies using the Actions Menu:

Procedure

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

4.3 Rating Scales

A rating scale is a tool used in Performance Management forms with which the reviewer assigns a score to the employee as a measure of performance.

When creating a rating scale, you can choose from the prebuilt rating scale types that are based on best practices, or create a new type as you need. By default the smallest number is the lowest rating and the largest the highest.

Prebuilt Rating Scale Type

Scale Type	Description
7-Point Scale (1-7)	This type of scale offers the highest level of differentiation, and may be helpful when extreme accuracy is preferred over convenience.
5-Point Scale (1-5)	Default rating scale type. This type is recommended because it contains a midpoint and allows for a balanced level of differentiation.
3-Point Scale (1-3)	This type of scale is applicable if you would like the result to be divided into two polar points or the neutral one.

4.3.1 Creating a Rating Scale

A rating scale is required before creating a form template. You can create a rating scale based on a predefined rating scale or build you own.

Prerequisites

The permission of *Rating Scales* under *Manage Form Templates* is granted.

Context

> **i Note**
>
> You can create a rating scale with up to 40 levels.
>
> If you use EZ Rater, please note that the more levels in a rating scale, the smaller the gap scale values display in the gap analysis chart on the form. You may find the gap scale values too small to read. For more information, refer to KBA 3266377.

Procedure

1. In Admin Center, go to *Rating Scales*.
    - If you're using the *Rating Scale Designer*, choose *Create New Rating Scale*.

- If you're using the *Enterprise Rating Scale* tool, enter the name for the rating scale and choose *Create*.

2. Enter a name and description for your rating scale.

> **i Note**
>
> The maximum length for the name field is 32 characters in English. If you're configuring the field in other languages, pay attention that one character may take up more than one English character.

3. Create a rating scale in either of the following way:
    - Select a prebuilt rating scale type.
      Scores, labels, and descriptions are filled out automatically. You can modify the values as necessary.
    - Select the *Build your own* option. Enter all scores of the rating scale, and enter the label and the description for each score.
      Scores, labels, and descriptions are shown when users choose ⓘ *(Help on rating scale)* in the rating section on forms. If necessary, you can include a link, for example, a PDF document, about rating scale details in a form section description.

   You can generate scores that increase incrementally by entering the minimum number in *Low*, maximal number in *High*, and the increment in *Increment*.
4. Choose *Save*.

Next Steps

To use this rating scale, when you configure a form template, associate the rating scale with the form template.

4.4 Route Maps

A route map establishes the steps and roles that are involved in a performance review. Each role on the route map gives ratings and comments in a step and then routes the form forward until it's completed.

> **Example**
>
> A Performance Management form is sent to the employee first, and then to the direct manager and to the HR manager. Before the form is sent to the HR manager, the form can be sent back and forth between the employee and direct manager.

In Performance Management, a route map consists of three consecutive stages:

- **Modify Stage**: This stage marks the start of a performance review and is the main stage during the whole process. For example, in this stage, employees give self-assessment on a form and managers review the form to give manager assessment.
- **Signature Stage**: This stage is where employees and managers sign and approve the form to acknowledge that the performance review is done.
- **Completion Stage**: This stage is where the form is archived in the employees' completed form folder.

4.4.1 Creating a Route Map

Create a route map to establish the steps and roles in a performance review.

Prerequisites

- *Workflow* in Provisioning is enabled.

    > → 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 permission of *Routing Maps* under *Manage Form Templates* is granted.

Procedure

1. In Admin Center, go to *Manage Route Maps*.

    The *Route Map List* page opens.
2. Choose *Add New Route Map*.

Option	Description
Build Your Own	You create a route map from scratch.
Choose from Library	You add a route map from the SuccessStore library. You can edit the route map after adding it.

    The configuration page for the route map opens.
3. Enter a name for the route map.
4. Select the following options as necessary.

Option	Description
I want to personalize the evaluation stage in a 360 review route map	This option is to create a route map for 360 Reviews.
Only create iterative and collaborative steps when all roles exist for a user	If a role selected for an iterative or collaboration step doesn't exist in your instance, the step is not created.
Use relative dates for form routing	Instead of selecting a specific date for the start date, exit date, and due date of a step, you can use relative dates. For example, you set the start date as 1 day after the form creation date.

5. Choose the *Add Step* icon to create steps in the modify and signature stages.

> **Note**
>
> A step in the completion stage is automatically created. Because users can't edit forms in the completion stage, you can't create additional steps for this stage.

6. In the *Create A New Modification Step* pop-up window, enter a step name and choose *OK*.

   The step is created and step configurations are available.
7. Complete step configurations for the step you created.

   The following table lists all fields. Some fields don't apply to all steps and thus may not appear on the step configurations page.

In this field...	Enter or select...
Step Name	The field is prepopulated with the name that you entered when creating the step. The step name is shown in the Route Map section on the form.
Step Description	Enter a step description. The description gives users more context on the action that they're about to take. It is shown in users' to-do list on home page.
Step Type	Select one of the following types: • *Single Role* • *Iterative* • *Collaboration* In signature steps, this field is for selecting a role. For more information on how to use step types, see the Step Types topic in Related Information.
Roles	Select a role for a single role step and more than one role for an iterative and collaboration step. For more information on the standard and custom roles used in Performance Management, see the Roles topic in Related Information.
Start Date	Select a date on which users can start working in this step. Setting a start date doesn't automatically lock the form. Users can access the form and edit it before the start date. To lock the form in a read-only mode until the start date is reached, select *Enforce start date*. Users won't be able to edit the form until the specified start date.

In this field...	Enter or select...
Exit Date	Select the earliest date on which users can route the form to the next step. Use this date only to prevent users from routing the form to the next step at any time. If you also use the *Automatic send on due date* option in the *Due Date* field, the exit date must be earlier than the due date.
Due Date	Select a date on which the step is completed. To automatically route the form to the next step on the due date, select *Automatic send on due date*, and make sure the scheduled job *Auto Route Based on Due Date* is 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. i Note The form is sent to the next step on the day after the due date. Additionally, to route only the forms that pass the form validation check, select *Only send forms that pass validation*. To route all forms regardless of whether they pass validation, select *Always send regardless of validation*.
Carbon Copy These User Roles Upon Document Completion (For the completion step only)	Select roles to whose completed form folder the copy of the form is sent when the form is completed.
Advanced Options	
Step Introduction & Mouseover text	Enter a description of users' action in this step. It is shown when users choose ⓘ next to the step name on the form.
Step Name After Completion	Enter a name for the step after it is completed. If you leave this field blank, the step name remains the same one as specified in *Step Name*.

In this field...	Enter or select...
Iterative Button Text (For iterative steps only)	Enter a text to customize the button text for users to send the form in an iterative step. You can use the `[username]` token, for example, *Send to cgrant*. **Note** To customize the button text, make sure that *Hide Hierarchy* isn't selected in Provisioning.
Step Mode	Select one of the following modes: • *Full Edit*: Allows users to edit any form content in text areas. • *Comment Only*: Allows users to add comments on the form only. You can't select a step mode for signature steps because users can only electronically sign the form but can't edit the form.
Reject Button Mouseover Text (For signature steps only)	Enter a description to inform users of what their action means. It is shown when users move the mouse over the *Reject* button.
Exit Button Text	Enter a text for the button to send the form to the next step. If you leave this field blank, the button is *Send to Next Step*. It is shown in three places: • In the *Actions* dropdown menu in the Route Map section • Among the buttons at the bottom of the form • Among the buttons on a confirmation page that opens before the form is sent
Step Exit Text	Enter a description to inform users of what they need to do and what their action means. When users send the form to the next step, a confirmation page opens before the form is sent. The description is shown when users choose ? on the page.

In this field...	Enter or select...
Previous Step Exit Button Text	Enter a text for the button to send the form to the previous step. If you leave this field blank, the button is *Send to Previous Step*. It is shown in three places: • In the *Actions* dropdown menu in the Route Map section • Among the buttons at the bottom of the form • Among the buttons on a confirmation page that opens before the form is sent
Previous Step Exit Text	Enter a description to inform users of what they need to do and what their action means. When users send the form to the previous step, a confirmation page opens before the form is sent. The description is shown when users choose ⓘ on the page.
Step Exit Reminder	See the Step Exit Reminder topic in Related Information.
Step Id	It doesn't indicate the order of the step in a route map, but an ID that the system generates to identify the step internally.
Start of Review (For modification steps only)	Select the checkbox to mark the step as the start of a performance review. If selected, the form is available in Team Overview. This step and all following steps are shown in Team Overview. **Note** In a route map, only one step can be marked as Start of Review.
Out of Turn Access (For modification steps only)	Select the checkbox to enable the Out of Turn Access feature. It grants the permission of viewing and editing the form to the step owner before the form is routed to their step. For more information, see the Out of Turn Access topic in Related Information.

In this field...	Enter or select...
1:1 Meeting (For modification steps only)	Select the checkbox to set up a dedicated conversation between an employee and their direct manager. **Note** • This option is available only in the last step in the modify stage. • It's available only in single-role steps. Manager (EM) is the recommended role for 1:1 Meeting. If you select this option, *Confirm 1:1 Meeting* is shown in Team Overview.

8. Choose *Save*.

   A route map is created.

Next Steps

To use this route map, when you configure a form template, associate the route map with the form template.

Related Information

Out of Turn Access [page 220]
Step Exit Reminder [page 229]
Step Types [page 31]
Roles [page 32]

4.4.2 Step Types

You can create a step in a performance review as a single-role step, an iterative step, or a collaboration step.

- *Single Role*: A single role works on a form in one step. For example, the employee works on a form in a step.
- *Iterative*: It is the most commonly used step type when several roles participate in one step. The form is sent to one user at a time, and the user sends the form to the other users specified in the step.

  > **Example**
  >
  > "I E EM EH" specifies an iterative step between the employee, their direct manager, and HR manager. All three roles can edit the form and send the form back and forth to each other before routing the form to the next step.

To use this step type, we recommend that you specify the entry user and exit user. So, the form is sent to the entry user first and to other users, before the exit user routes the form to the next step.

- *Collaboration*: It is another step type when several roles participate in one step. The form is sent to all users at the same time, but only one user can work on the form at a time. When users open a form, they may find it locked. It is because another user is currently editing the form. The form remains locked until the user chooses *Cancel* or *Save and Close* on the form. If the user doesn't leave the form, the form remains locked for 60 minutes.

> Example
>
> "C E EM" specifies a collaboration step between the employee and their direct manager. Both of them have access to the form, but only one of them can edit the form at a time.

To use this step type, we recommend that you specify an exit user, who routes the form to the next step.

> Note
>
> If you don't specify an exit user, when forms are sent automatically on the due date or sent manually in *Route Form*, a form validation check won't be triggered.

4.4.3 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.

Role Value	Role Name	Role Description
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

5 Configuring Form Templates in Admin Center

By configuring form templates, you define form settings, for example, form title and description, associated route map and rating scale, fields and sections, and form permissions. You can use *Manage Templates* in Admin Center to configure form templates.

In *Manage Templates*, you can do many tasks, including:

Creating a Form Template [page 34]
Create a form template so that you can configure the form template for performance reviews.

Configuring General Settings [page 35]
Configure the general settings of a form template to define the title, route map, rating scale, and other configuration of Performance Management forms.

Configuring Form Sections [page 45]
Configure the sections and fields of a form template to define the settings for Performance Management forms.

Configuring Form Permissions [page 75]
By default, all roles in all steps are granted with all form permissions, including permissions for buttons, tabs, sections, actions, and fields. You can configure the form template to allow a role to have or not to have a specific permission in a specific step.

Configuring Required Fields [page 86]
Configure required fields in a specific step to require users to complete the fields before they send the form to the next step.

Configuring Custom Fields [page 89]
Configure custom fields in a goal section, competency section, and custom section according to your business needs.

Localizing Labels [page 92]
Localize labels in the form template so that labels on forms can be shown in logged-in user's language.

5.1 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.

5.2 Configuring General Settings

Configure the general settings of a form template to define the title, route map, rating scale, and other configuration of Performance Management forms.

Prerequisites

Grant the permission of *Form Templates* and *Comprehensive template configuration for PMv12* under *Manage Form Templates* in *Manage Permission Roles*.

Procedure

1. In Admin Center, go to *Manage Templates*.
2. Open a form template and select *General Settings*.
3. Complete the configuration for the following fields or options.

Field or Option	Description
Name	Enter a name for the template. By default, it's the form title.
Description	Enter a description for the template. It isn't shown on the form.
Route Map	Select a route map you created.

Field or Option	Description
Rating Scale	Select a rating scale you created.
Hide numeric rating values (only show text labels)	Select the checkbox to show on the form only the rating labels defined in *Rating Scales*. When the rating scale has no more than five rating levels, if you select this option, the rating field on the form becomes a dropdown list showing rating labels only. When the rating scale has more than five rating levels, the default rating field is a dropdown list showing both rating values and labels. If you select this option, the dropdown list shows rating labels only.
Unable to Rate	Enter a name, for example, Too New to Rate, to define a special rating on the rating scale. Performance reviewers can select this rating when they think it's too early to give a regular rating for a goal or competency of an employee. The configuration applies to the goal section, competency section, and summary section. Or, you can leave the field blank and customize the configuration in three sections separately.
Allow managers to stack rank employees on competency sections	Select the checkbox to enable the Stack Ranker feature. Select *Globally* to enable the feature for all competency sections on the form, or *Section by Section* to enable the feature in the section level.
Advanced Options	
Enable Previous Step Button	Select the checkbox to enable the *Send to Previous Step* button on the form. You can enable the button for specified steps and roles by configuring button permissions.
Enable Delete Button	Select the checkbox to enable the *Delete Form* button on the form. You can enable the button for specified steps and roles by configuring button permissions.
Enable Scale Adjusted Calculation	See the Configuring Scale Adjusted Calculation topic in Related Information.

4. Choose *Save*.

Related Information

Stack Ranker [page 225]

Creating a Rating Scale [page 24]
Creating a Route Map [page 26]
Configuring Form Permissions [page 75]
Configuring Scale Adjusted Calculation [page 37]

5.2.1 Configuring Scale Adjusted Calculation

Configure scale adjusted calculation to adjust the calculated form rating to a fixed rating value, so that the calculated form rating with a decimal can be shown as an integer with a rating description.

Procedure

1. In Admin Center, go to *Manage Templates*.
2. Open a form template and select *General Settings*.
3. Choose *Enable Scale Adjusted Calculation*.

   The *Scale Adjusted Calculation* dialog box pops up.
4. Select *Enable Scale Adjusted Calculation*.
5. Choose *Add Another* and configure a specific rating by defining the following fields.

Field	Description
Score Min Value	The lowest possible rating of the calculated form rating that will be adjusted to a fixed value. Example: 0.1
Score Max Value	The highest possible rating of the calculated form rating that will be adjusted to a fixed value. Example: 1.49
Map to Score	A fixed value to which the calculated form rating in the range from Score Min Value to Score Max Value will be adjusted. Example: 1
Map to Description	The rating description of the fixed value. Example: Unsatisfactory

   Repeat this step to configure all adjusted ratings.
6. Optional: Select *Enable Display Calculated Rating* to show the original calculated form rating under the adjusted calculated form rating in the form.
7. Choose *Done* in the dialog box and choose *Save* on the page.

Results

The scale adjusted rating is configured. It applies to only the forms that are launched after your configuration.

5.2.2 Form Template Settings

The *Form Template Settings* tool provides you with options to enable or disable some form template settings.

To access *Form Template Settings*, you can either navigate to *Admin Center* > *Form Template Settings*, or choose *Advanced Settings* in the *General Settings* section of the form template in *Manage Templates*.

Learn about the form template settings and descriptions in the following table.

> **Note**
>
> Some but not all changes made to the form template apply to the in-progress forms that are based on this template.

<table>
<tr><th>Setting</th><th>Description</th></tr>
<tr><td>Template Name</td><td>The name of the form template. You can change it at any time although not recommended. Form title includes this name by default.

You can also 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 don't see the changed form title on 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 on the form.
• Once the template name is configured in logged-in users' language, the form title is displayed in logged-in users' language.</td></tr>
<tr><td>Template Type</td><td>For Performance Management form templates, the type is PM Review. It's read-only.</td></tr>
<tr><td>Last Modified</td><td>The date and time when the form template was last modified. It's read-only.</td></tr>
<tr><td>Routing Map</td><td>The route map associated with the form template</td></tr>
<tr><td>Default Dates for Form Creation</td><td>Determines the default start, end, and due dates either fixed or relative to:

• Form Creation Date
• Default Start Date
• Default Due Date</td></tr>
</table>

Setting	Description
	i Note If a form template is saved as another template, this setting is not cloned to the new template.
Disable Ask for Feedback functionality	Refer to Ask for Feedback [page 176].
Display circle icon as rating	The rating field uses the star icon by default. If you select this option, the rating field uses the circle icon. When the setting is selected, it takes effect on in-progress forms. There's a default tooltip over the star or circle icon on forms to guide users to give ratings by keyboard. You can customize the tooltip in the *Manage Languages* admin tool using this key: `PERFORMANCE_PM2_RATING_STAR_WIDGET_TITLE`.
Display check mark instead of rating in Team Overview	If enabled, check mark is displayed instead of rating in Team Overview. All scores recorded for the form are made visible to any user who has access to Team Overview. To hide any scores from users in Team Overview, you must select the check mark option.
Display Last Competency Ratings from a Form Template	Refer to Last Competency Rating [page 216]. **i Note** If a form template is saved as another template, this setting is not cloned to the new template.
Display Last Competency Ratings from Rating Sources	Refer to Last Competency Rating [page 216].
Default Due Notification Date (in days)	The number of days before the form due date. On the due notification date, an email notification is sent to the user who has the form in their form inbox, reminding them that the form is approaching the due date. The email is sent during off business hours, after midnight EST.
Default Late Notification Date (in days)	The number of days after the form due date. On the last notification date, an email notification is sent to the user who has the form in their form inbox, reminding them that the form is past the due date. The email is sent during off business hours, after midnight EST.
Template Status	• *Enable*: The form template can be used to launch forms. • *Disable*: The form template can't be used to launch forms.
Template Flag	• *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. • *Private*: Forms are not transferred during the manager transfer process. Private forms remain with the old manager. This setting has no impact on the route map. If there are EM steps in the route map that haven't been completed, the form is routed to the new manager in the EM steps.

Setting	Description
Do Not Transfer Documents	Refer to Configuring Document Transfer in Form Templates [page 188]. **i Note** If a form template is saved as another template, this setting is not cloned to the new template.
Automatic Manager Transfer	Refer to Configuring Document Transfer in Form Templates [page 188]. **i Note** If a form template is saved as another template, this setting is not cloned to the new template.
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, the following settings override the global setting that may remove inactive employee's documents. The settings are useful when an employee is terminated but still has an active form that entitles this employee to incentive pay. • *Do Not Remove Inactive Employee's In-Progress Documents* • *Do Not Remove Inactive Employee's Completed Documents*
Default Targets	• *Self and Direct Reports*: Users can create forms for which they themselves or their direct reports are the subject. • *Self Only*: Users can create forms for which they are the subject. • *Direct Reports Only*: Users can create forms for which their direct reports are the subject. • *HR Reports Only*: Users can create forms for which their HR reports are the subject. • *Self and Matrix Reports*: Users can create forms for which they themselves or their matrix reports are the subject. • *Matrix Reports Only*: Users can create forms for which their matrix reports are the subject. See also the setting *Allow form creator to select anyone as a subject*.
Hide Route Map on the Form	Hides the route map section on the form.
Keep last touched version upon Document completion	Users can't see form updates after their last modification step.
Enable Auto Logout at Session Timeout	Users are automatically logged out of the system when the session gets timed out.
Enable Auto Restore Deleted Form When Importing User	If employees have been deactivated and are reactivated, the deleted forms of the employees will be restored when they are imported into the system. **i Note** • When you enable the setting, it may take a long time to import employees because there may be a large number of deleted forms to be restored. If you think it's not necessary to restore the forms for those employees, we do not recommend you enable the setting.

Setting	Description
	• Only those forms that were in progress when being deleted are restored. Completed forms are not restored. • If document transfer is disabled and the manager has changed, forms are restored to the old manager who had the forms. • If document transfer is enabled and the manager has changed, when forms are restored, document transfer settings are applied. • If forms had been sent to others for feedback when being deleted, the forms are restored to the person who had them.
Enable Spell Check	Refer to Spell Check [page 223].
Enable Legal Scan	Refer to Legal Scan [page 219].
Disable Spell Check on Route	Refer to Spell Check [page 223].
Disable Legal Scan on Route	Refer to Legal Scan [page 219].
Use Plain Text Only for Comments (Warning: You will lose RTE formatting in existing forms by enabling this.)	Only plain texts are used when users enter comments.
Enable Writing Assistant	Refer to Writing Assistant [page 233].
Disable Ask for Comment Routing	Refer to Get Feedback [page 214].
Disable Ask for Edit Routing	Refer to Get Feedback [page 214].
Allow Add Approver/Evaluator	Refer to Add Modifier [page 172].
Hide Add/Remove Signer buttons	Refer to Add Signer and Remove Signer [page 173].
Disable All Toolbar Buttons (overrides all button selections below)	Hides *Actions*, *History*, *(Print)*, *(Save as PDF)*, and *(Save)* in the top right of the form.
Disable Print Button	Hides *(Print)* in the top right of the form.
Disable Send and Open Next Form Button	Hides the *Send and Open Next Form* button on the confirmation page of sending the form to another step.
Disable Page Setup button	Hides page setup options when users want to save as PDF.
Disable Delete button	Users can't delete forms. See also Button Permissions [page 76]. If this setting is not selected, you can disable deletion in forms by selecting *Hide Delete Icon inside Form* in the *Performance Management Feature Settings* admin tool. The delete icon is still available in form Inbox.
Disable Note button	Hides Notes information from the Supporting Information pod.

Setting	Description
Disable Form button	Hides the *Performance form history* option from the *History* dropdown in the top right of the form.
Disable 360 button	Hides the *360 form history* option from the *History* dropdown in the top right of the form.
Disable Info button	Refer to Form Information [page 212].
Disable Download button	Not supported in Performance Management
Disable Send button	Users can't send forms to the next step. See also Button Permissions [page 76]
Disable Send button for completed documents	Hides the *Send* button in completed forms.
Disable Late Notification	Disables the email notification sent to the user when the form is past the due date. See also the setting *Default Late Notification Date (in days)*.
Disable Due Notification	Disables the email notification sent to the user when the form is approaching the due date. See also the setting *Default Due Notification Date (in days)*.
Disable Step Exit Notification	Disables the email notification sent to the user when the form is sent to another step.
Enable Custom Layout Printing	Refer to Configuring Custom Print [page 268].
Disable PDF printing	Hides *(Save as PDF)* in the top right of the form.
Allow form creator to select anyone as the subject	Allows users to create forms for anyone, besides themselves, including their direct reports, HR reports, and matrix reports.
Allow Matrix Manager to Delete document if Delete button is available	Allows matrix managers to delete forms if *Delete Form* isn't disabled.
Show Signoff routing step names in Signoff Stage	Shows the signature step name in the signature stage.
Display Step Start Date	Not supported
Enable form title editability in the Form	When you select the option, the following effects are applied: • The form title is the template name in the language used at the time of form launch. • The form title is no longer affected by changes to the template name. • The form title is no longer affected by the logged-in user's language settings. It's in one language only. If this setting is disabled later, the title of all launched forms is automatically updated to match the current template name.
Enable form title editability in Form info page	Apart from the same effects of the previous setting, this one, when enabled, allows you to edit the form title on the Form Information page.
Enable Completed Form Item Comment Copy	The comments for goals or competencies on completed forms can be copied.

Setting	Description
Choose when to display the Add/Remove Signer buttons	Refer to Add Signer and Remove Signer [page 173].
Only create for users who don't have an existing or in-progress form with an End Date: between [date] and [date]	Forms can't be launched for users who already have the form in the specified date range. If you select this setting, you can also select *Do not allow admin users to edit the date range in the Launch Form tool*. **Note** If a form template is saved as another template, this setting is not cloned to the new template.
Hide the Export and Export (Compact) buttons for documents in the Completed Folder	Hides the *Export* and *Export (Compact)* buttons on completed forms.
Show digital signatures in Document Print Preview	Shows digital signatures in the form print preview.
Disable Due Date Validation	Disables the validation that checks the form to make sure the end date is before or the same as the due date.
Disallow users from changing the Start Date	Users can't change the start date on the form.
Disallow users from changing the End Date	Users can't change the end date on the form.
Disallow users from changing the Due Date	Users can't change the due date on the form.
Enable form routing to previous step	Users can send forms to the previous step. See also Button Permissions [page 76].
Enable SMART Goal Wizard (requires SMART Goal Wizard enabled on goal plan)	The SMART Goal Wizard is enabled in forms. **Note** If you're using the latest Goal Management, the SMART Goal Wizard is not available.
Show Manager Rating first for EZ Rater mode	Manager's rating is shown first in the EZ Rater mode.
Prevent forms from being created with overlapping date ranges (this applies to all templates with this configuration enabled)	Users or admins can't create forms that have overlapping date ranges. This setting checks the dates of all launched forms that have this setting enabled.

Setting	Description
Enforce permissioning for Detailed Document Search & Archive & Print Reporting	By default, *Detailed Document Search* disregards permissions and includes all form fields. Enable this setting to ensure the permissions are respected. This setting also enables the archive and print report to respect permissions for the logged-in user.
Allow exit step comments to be visible to all participants in a Collaborative (C) Step (only applicable for forms that have not progressed beyond the C Step)	Exit step comments are visible to all the participants in a collaboration step on the Form Information page. This setting applies to only the forms that have not progressed beyond the collaboration step. If you select the option, make sure that *Document Routing Notification* in *E-Mail Notification Templates Settings* is enabled and the `[[DOC_COMMENT]]` token is included in the email notification template.
Enable attachments	Allows users to upload attachments in the Supporting Information pod.
Disable Table of Contents	Hides the form section navigation under the form subject information on the form.
Define the PDF file name format	• *Form Title and Creation ID* • *Custom* **Note** If a form template is saved as another template, this setting is not cloned to the new template.
Enable Achievements tab in Performance Goal Section Display Achievement Feedback for Performance Goal Achievements Enable Achievements tab in Performance Development Goal Section Display Achievement Feedback for Development Goal Achievements	Refer to Achievements and Feedback from Continuous Performance Management [page 285].
Enable New Confirmation Experience for Sending Forms	When users send a form to the next or previous step, a message popup appears and allows them to confirm the action. It applies to the following actions: • Send forms to the next step • Send forms in an iterative or collaboration step • Send forms to the previous step • Sign forms • Reject forms

Setting	Description
	• Send a copy of completed forms When the setting is selected, it takes effect on in-progress forms. The message popup includes the following labels that you can replace using *Manage Languages* in Admin Center: • `FB_FORM_SEND_NEW_GENERAL`: `You're about to send this form to the next person(s) specified in the workflow.` • `ROUTE_Forward_Form_To`: `Forward Form to` • `PERFORMANCE_WORKFLOW_COMMENT_TITLE`: `Email Notification Comments` For more information on replacing labels, refer to Customizing UI Text with the Manage Languages Tool

5.3 Configuring Form Sections

Configure the sections and fields of a form template to define the settings for Performance Management forms.

Prerequisites

Grant the permission of *Form Templates* and *Comprehensive template configuration for PMv12* under *Manage Form Templates*.

Context

Performance Management forms provide four kinds of summary sections: summary section, goal competency summary section, performance potential summary section, and customized weighted rating section. The overall form rating is from any configured one of these four sections, and if multiple are configured, the following order applies:

- Customized weighted rating section
- Performance potential summary section
- Summary section
- Goal competency summary section

Procedure

1. In Admin Center, go to *Manage Templates*.
2. Open a form template and choose *Edit Fields and Sections*.
3. Add or delete sections, and edit fields or options for each section.

> **i Note**
>
> If the *Section Name* field is empty in a section, the system considers the corresponding section as an item or custom element of the previous section. In this case, the form can't get printed properly when users choose *Save as PDF* or *Print* on the form.

Performance Management supports the following standard and custom sections.

Section	Description
Introduction	The section provides information about a performance review to users. It can include the purpose of the review, whom to call for assistance, or any other information that you feel is relevant to the review.
Review Dates	The section shows the dates that you set when you launched the form.
Employee Information	The section shows basic employee data of the individual to be reviewed, such as first name, last name, and username. You can include or exclude various fields to show more or less information about the employee. This information is read-only on the form.
Goal	See Goal Section for more information.
Competency	See Competency Section for more information.
Summary	See Summary Section for more information.
Goal Competency Summary	See Goal Competency Summary Section for more information.
Performance Potential Summary	See Performance Potential Summary Section for more information.
Customized Weighted Rating	See Customized Weighted Rating Section for more information.
Signature	The section shows the name of the people who should sign the form. When they sign the form, it shows the signature of the signer and the date when signed. You can select *Include comment* to set a mandatory comment when the form is signed.
Mid Year	The section is an optional area of the form that can be used for open and overall comments about the subject of the form.
Custom	The section is an optional area of the form that can be used for open and overall comments about the subject of the form.
Additional Comments	The section is an optional area of the form that can be used for open and overall comments about the subject of the form.

4. Choose *Save*.

Goal Section [page 47]
Goal sections are used to evaluate employees' performance goals or development goals during a performance review.

Competency Section [page 61]

Competency sections are used to evaluate employees' competencies during a performance review. A Performance Management form can include three competency sections, respectively for job-specific competencies, core competencies, and custom competencies.

Summary Section [page 65]
The summary section displays the calculated form rating that is based on the ratings from goal and competency sections. You can also enable manual rating, which is the official rating of the form when enabled.

Goal Competency Summary Section [page 67]
The goal competency summary section calculates the OCOC rating, overall goal rating, and overall competency rating, and allows users to edit the last two ratings.

Performance Potential Summary Section [page 70]
The performance potential summary section allows users to manually give the performance rating and potential rating.

Customized Weighted Rating Section [page 72]
The Customized Weighted Rating section shows the calculation details that arrive at the calculated rating, including route steps, roles in each step and their names, ratings, and weights configured in business rules.

5.3.1 Goal Section

Goal sections are used to evaluate employees' performance goals or development goals during a performance review.

Performance goals are job-oriented and result-based statements of an employee's ongoing and project-specific responsibilities. Development goals focus on learning, which is essential to improving individual or organizational performance.

One goal section is linked to one goal plan or one development plan. A form can have several goal sections, for example, one section for core company goals and one section for departmental goals. All goal sections work in the same way.

> → Recommendation
>
> We recommend that in each performance review cycle, you create a new goal plan and link the new one to forms. If you use one goal plan continuously for many years, please note that each year when users update goals in the goal plan, goal details in completed forms is updated accordingly.

Learn about the fields and options that you can configure and select for the goal section in the following table.

Field or Option	Description
Section Name	The name of the section that is shown on the form
Section Description	The description of the section that is shown on the form

Field or Option	Description
Section Type	The goal section supports the following goal types. One section is for one type. • *Goal Section*: Select a goal plan that you want to link to the form. **i Note** If a goal plan template is newly imported, make sure that the goal plan is effective before you link it to the form. See Step 6 in Importing a Goal Plan Template. • *Individual Development Plan Section*: Select a development plan that you want to link to the form. If you link a goal plan or a development plan to forms, make sure that users have the role-based permission for the relevant template in *Goals* > *Goal Plan Permissions*. **i Note** If you link multiple goal sections with the same goal plan without using `<obj-category>` to filter goals, the goals are displayed in only one section.
Show Add Existing Objective Button / Show Add Existing Development Objective Button	The button is used to add existing goals in the linked goal plan to the form. **i Note** The button is not needed if goals are synced to the form automatically.
Unable to Rate	The label of a special rating on the rating scale, for example, Too New to Rate. Performance reviewers can select this rating when they think it's too early to give a regular rating for a goal of an employee. If you already configured this field in *General Settings*, you don't need to configure it again here.
Include the ability to rate	Users can rate on each goal. See the Rating Options topic.
Exclude Private Goals	Private goals are excluded from the form when the form is created. Also, you can't add a new private goal to the form. **i Note** This option only works when you launch a form. If you change the public goals on the form to private goals after launching the form, the goals still appear on the form.

Field or Option	Description
Include the ability to enter a weight	Users can edit the weight of each goal.
Include a comment for each item	Users can comment on each goal.
Include an Overall Comment	Users can give an overall comment on the goal section.
Display section in summary	The rating and weight of goals are shown in the summary section.
Display calculated section rating	The calculated goal rating is shown in the summary section.
Auto populate goal weights from weights in the goal plan	Weights from the goal plan synchronize to the form.
Allow users to add/remove Goals within the section	Users can add goals to the form and remove goals from the form. You can enable the add and remove actions for specified roles and steps by configuring action permissions. **Note** To allow users to add goals to forms, if you're using legacy Goal Management, make sure that users have the "create" permission in the goal plan template; if you're using the latest Goal Management, make sure that users have both the "create" permission in the goal plan template and the role-based permission for the goal plan template.
Synchronize goals from a goal plan and a review form	Changes made to goal plans automatically synchronize to the goal section on the form. Also, changes to goals on the form automatically synchronize to the goal plan. **Note** If you use the latest Goal Management and you enabled the auto-sync feature in Performance Management, please be aware of the following: • Users can delete a goal on a Performance Management form only when they have the *User Permissions* > *Objectives* > *Objective Plan Permissions* role-based permission to the goal plan of that goal. The goal deleted from the form will also be deleted from the goal plan. • Users without the permission can't see the button to delete the goal on the form. For more information, see Auto-Sync and Auto-Populate.

Field or Option	Description
Use Metric Lookup Table Rating	If the linked goal plan has a metric lookup table, this option is selected by default. For more information, see Goal Ratings from Metric Lookup Tables.
Include in overall Goal rating calculation	Ratings in this section are included in the calculation of the overall goal rating. The option is useful if you have multiple goal sections and want to leave one section out of the calculation.
Display in Goal section	Goals in this section are listed in the goal competency summary section.
Lock item weights	Goal weights are locked so that users can't change the weights.
Include in overall performance summary section rating	Ratings in this section are included in the calculation of the performance rating in the performance potential summary section.
Minimum Goals Required	The minimum number of goals required in this section
Maximum Goals Allowed	The maximum number of goals allowed in this section
Section Weight for Obj/Comp Summary	The weight of the section for calculating the overall goal rating in the goal competency summary section
Total Weight	Target total weight for the goals in this section
Rating Scale	The rating scale used in this section. If you've selected a rating scale in *General Settings*, you don't need to select it again here.
Default Rating	The label that is shown in the rating field if users haven't rated on goals
Choose an alternate label for the rating field	The label of the official rating field
Goal Plan State	If you've configured this feature for the linked goal plan, the goal state can be changed to a specified state when the form moves to a specified step or when the form is completed or deleted.

i Note

For development goal sections, you can configure only the following settings in *Manage Templates*:

- Include the ability to rate
- Exclude Private Goals
- Include the ability to enter a weight
- Include a comment for each item
- Include an Overall Comment
- Allow users to add/remove Goals within the section

Rating Options [page 51]
When you select *Include the ability to rate* in a form template in *Manage Templates*, you need to further select settings to define a rating option. Or, in an XML form template, if the `no-rate` attribute is `false`, you need to specify the `rating-opt` attribute to define a rating option. Performance Management provides four rating options.

[Auto-Populate and Auto-Sync [page 58]]
Goals in a goal plan are auto-populated to a Performance Management form. When the form is created, all goals created in the goal plan are included on the form. Goals can also be auto-synchronized between a goal plan and a form.

[Goal Ratings from Metric Lookup Tables [page 60]]
You can view the ratings of the metric-based goals on Performance Management forms. The ratings calculated through a metric lookup table in a goal plan are populated to forms when the forms use star ratings for a 3-point or a 5-point rating scale.

Related Information

Importing a Goal Plan Template

5.3.1.1 Rating Options

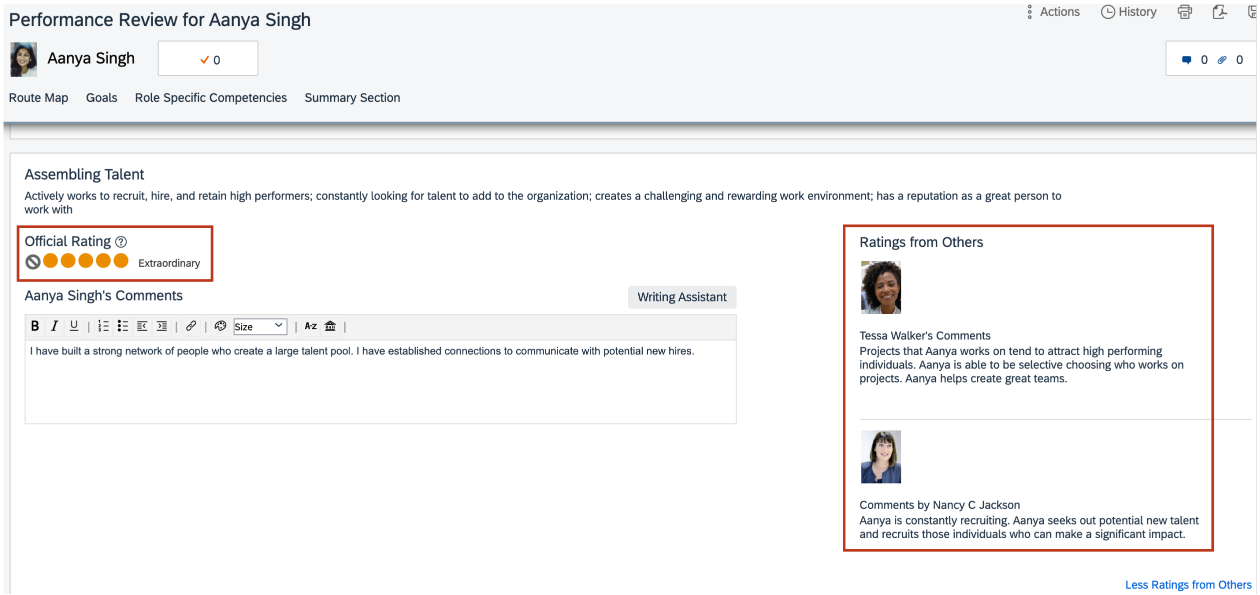
When you select *Include the ability to rate* in a form template in *Manage Templates*, you need to further select settings to define a rating option. Or, in an XML form template, if the `no-rate` attribute is `false`, you need to specify the `rating-opt` attribute to define a rating option. Performance Management provides four rating options.

Rating Option 0

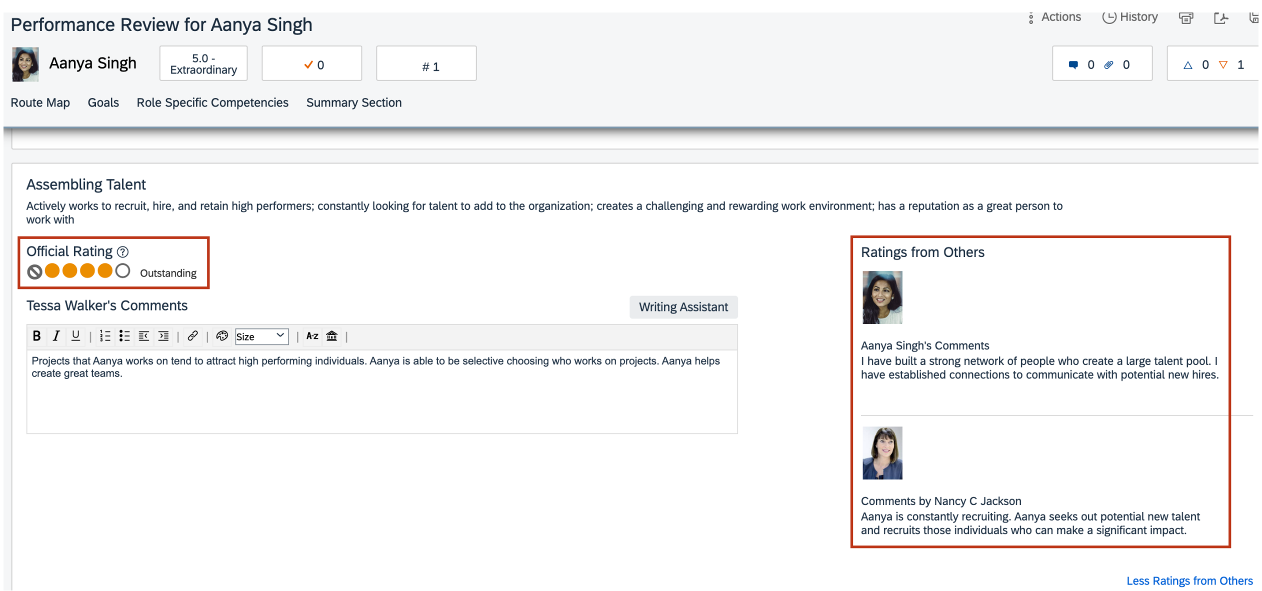
To use Rating Option 0, select *Everyone shares one rating box for each item*. In the XML form template, set the `rating-opt` attribute to `0`.

All users with required permissions share one rating field for each item. The only rating field is called item rating, also known as the official rating. With this rating option, the first user sets a rating but the second user can change it. The last user in the route map with write permission has final say over the official rating.

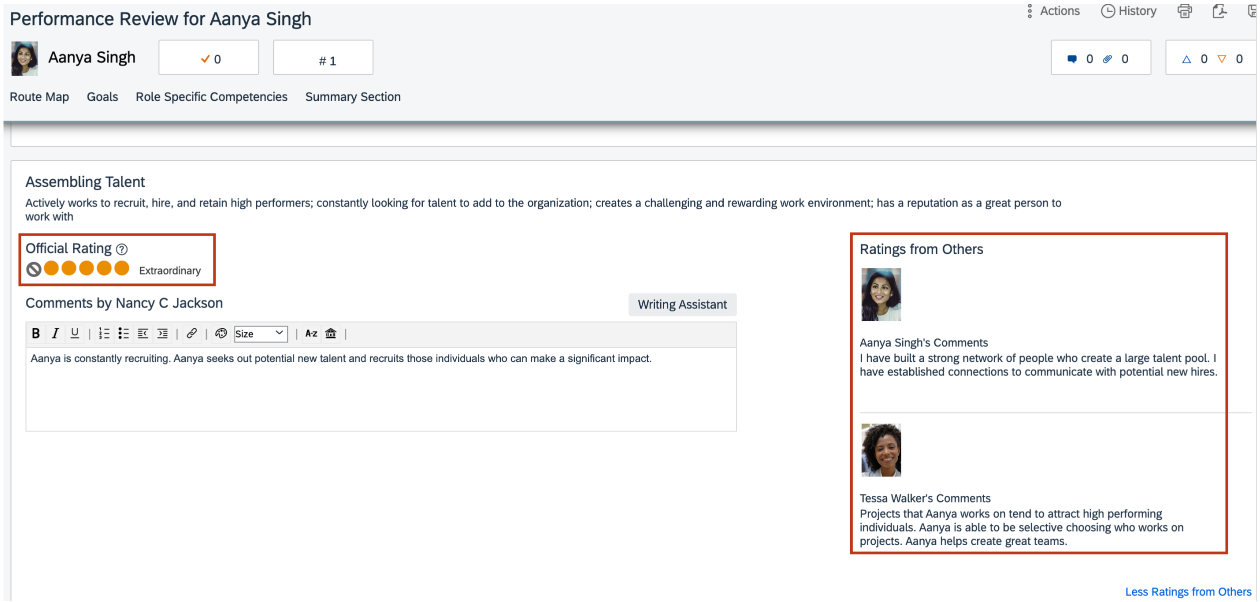
The rating field is shown on the form as follows. In the PDF and print version, only the official rating is available.



Employee's View



Manager's View



Matrix Manager's View

Rating Option 1

To use Rating Option 1, select *Everyone shares one rating box for each item* and *Except the employee who has a self-assessment rating box*. In the XML form template, set the `rating-opt` attribute to `1`.

All users with required permissions share one rating field for each item, which is the official rating. The last user in the route map with write permission has final say over the official rating. In addition, employees can give self-rating in a rating field called unofficial user rating.

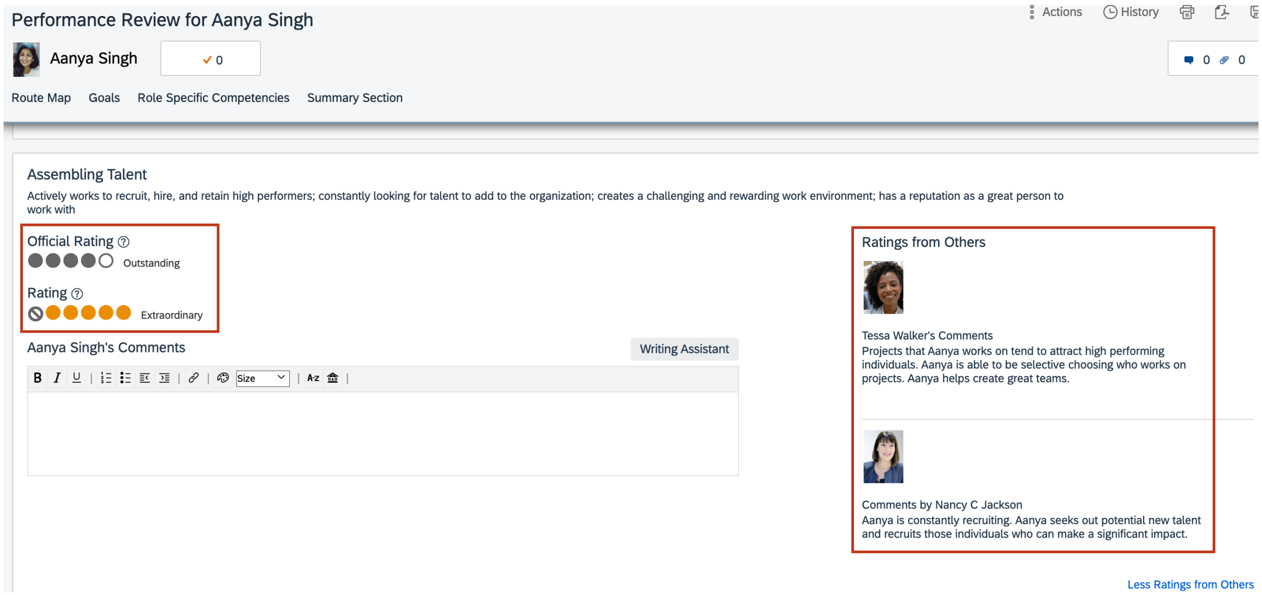
→ Recommendation

To prevent employees from providing the official rating, the recommended approach is to grant them read or none permission for the item rating field.

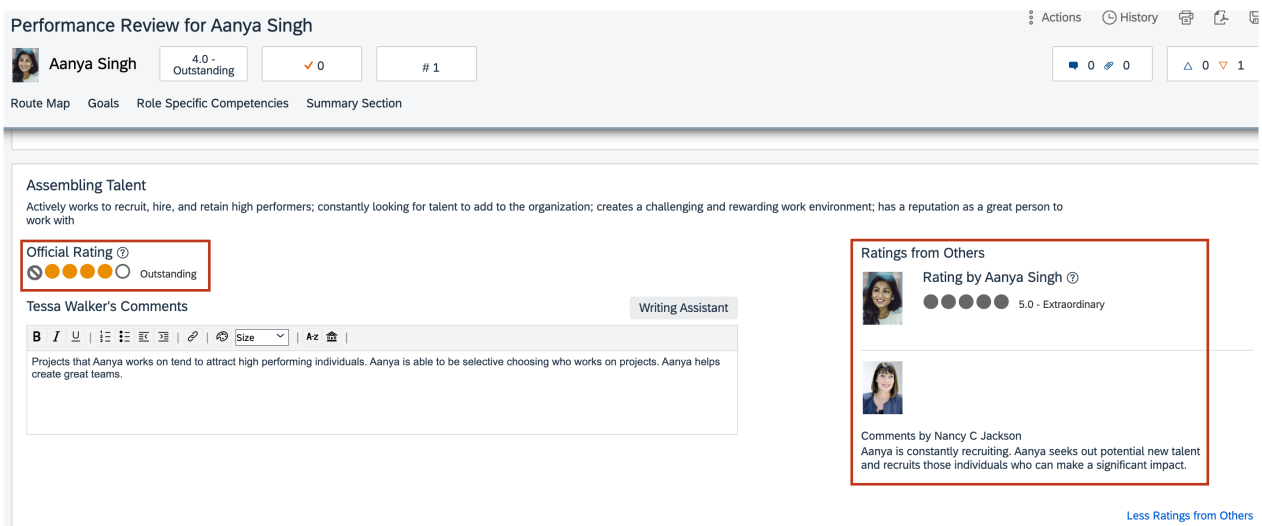
i Note

To show the unofficial user rating field, *Include a comment for each item* should be selected in *Manage Templates*. In the XML template, the `cmt-opt` attribute should be set to `1` or `3`.

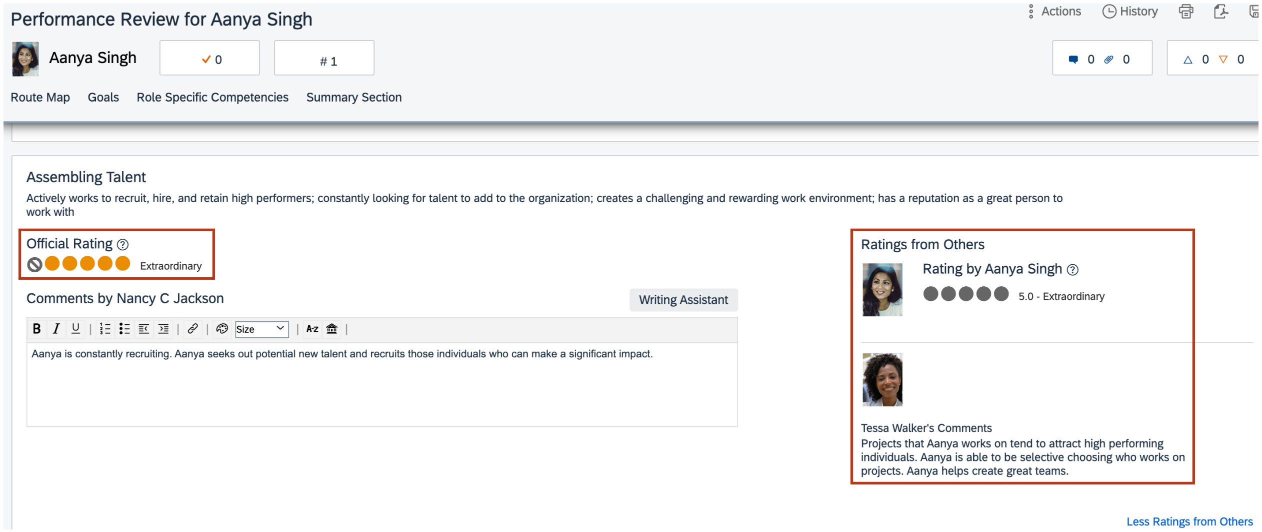
The rating fields are shown on the form as follows. In the PDF and print version, the official rating and one unofficial user rating, if any, are available.



Employee's View



Manager's View



Matrix Manager's View

Rating Option 2

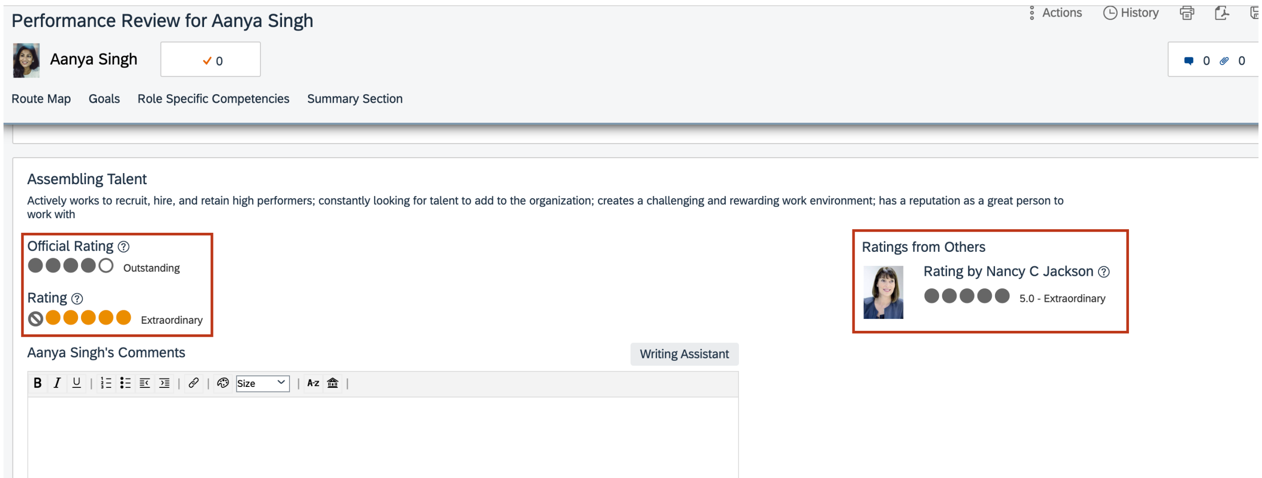
To use Rating Option 2, select *Everyone has their own rating box for each item* and *The final score can be granted to any role by permission*. In the XML form template, set the `rating-opt` attribute to `2`.

All users with required permissions can edit both the item rating field and the unofficial user rating field. Users who can provide the official rating should have write permission for the item rating field. The last user among them has final say over the official rating. Users who aren't supposed to provide the official rating should have none permission for the item rating field and have read or write permission for the unofficial user rating field.

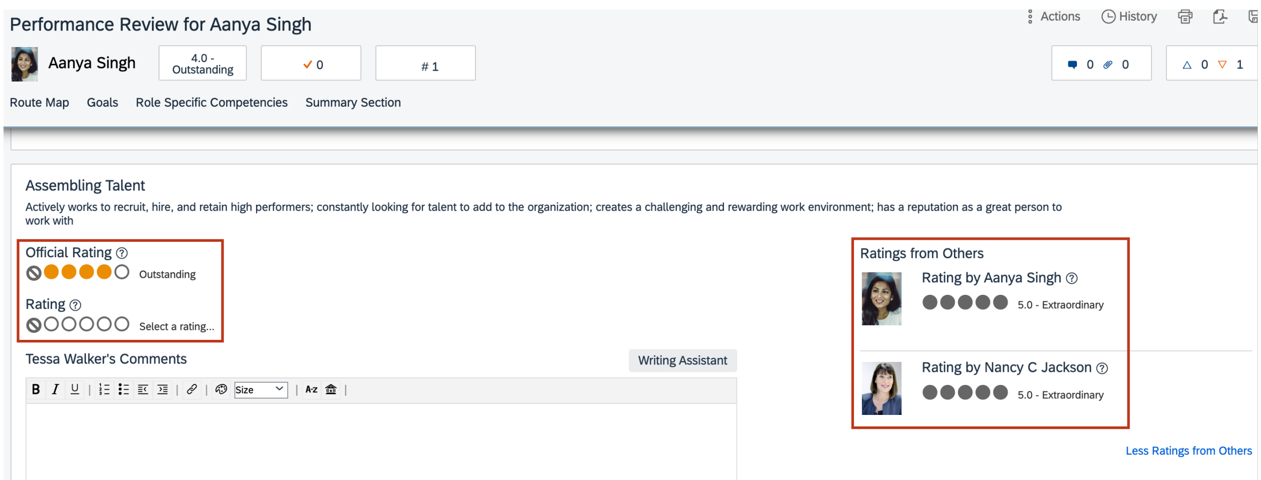
> → Recommendation
>
> Users have two rating fields by default. To avoid confusion, we recommend that you configure field permissions to hide the unofficial user rating field from those users who can provide the official rating.

> i Note
>
> To show the unofficial user rating field, *Include a comment for each item* should be selected in *Manage Templates*. In the XML template, the `cmt-opt` attribute should be set to `1` or `3`.

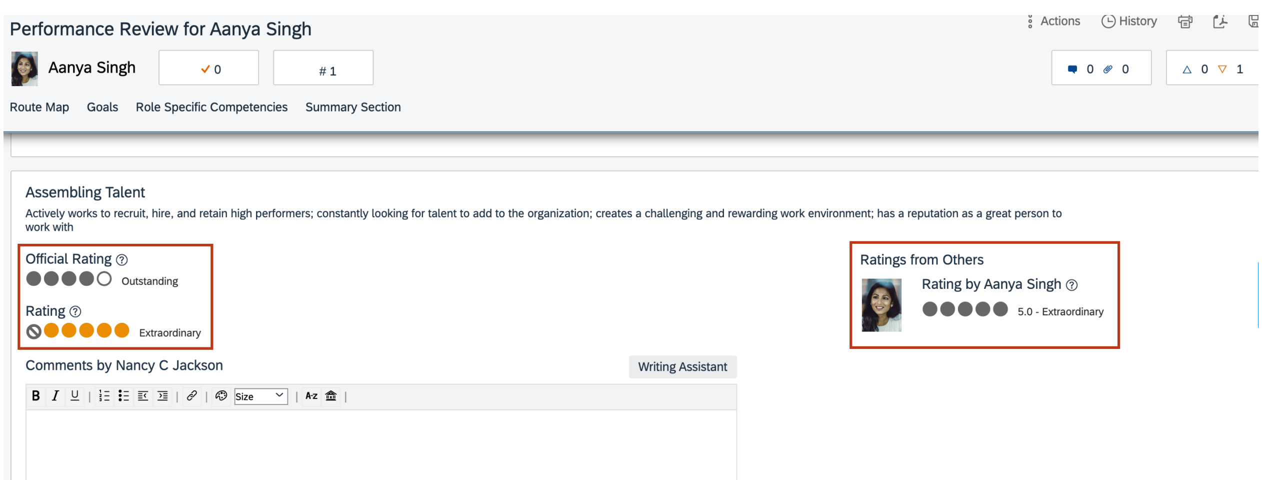
The rating fields are shown on the form as follows. In the PDF and print version, the official rating and unofficial user ratings, if any, are available.



Employee's View



Manager's View



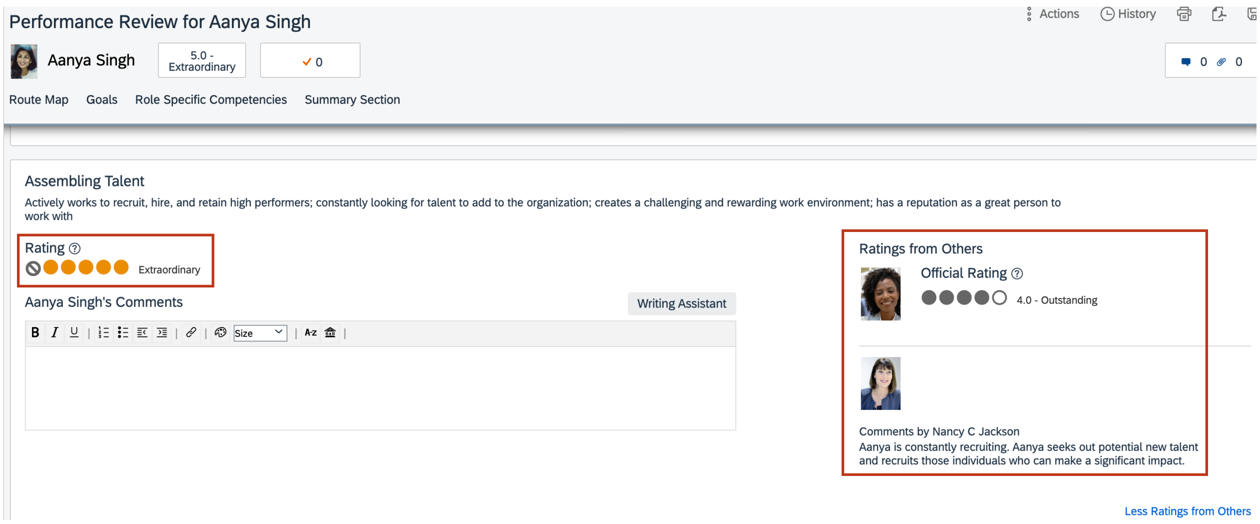
Matrix Manager's View

Rating Option 3

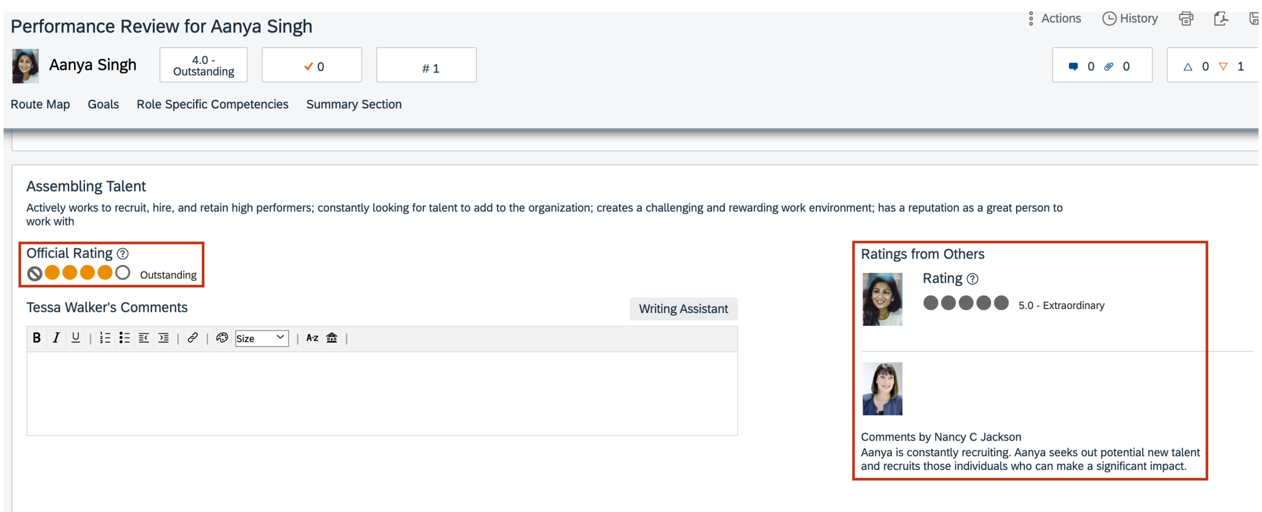
To use Rating Option 3, select *Everyone has their own rating box for each item* and *The final score is the EM's rating*. In the XML form template, set the `rating-opt` attribute to `3`.

With this option, only employees and managers can provide ratings. The rating field for employees is called subject rating and the field for managers is called item rating. Managers have final say over the official rating.

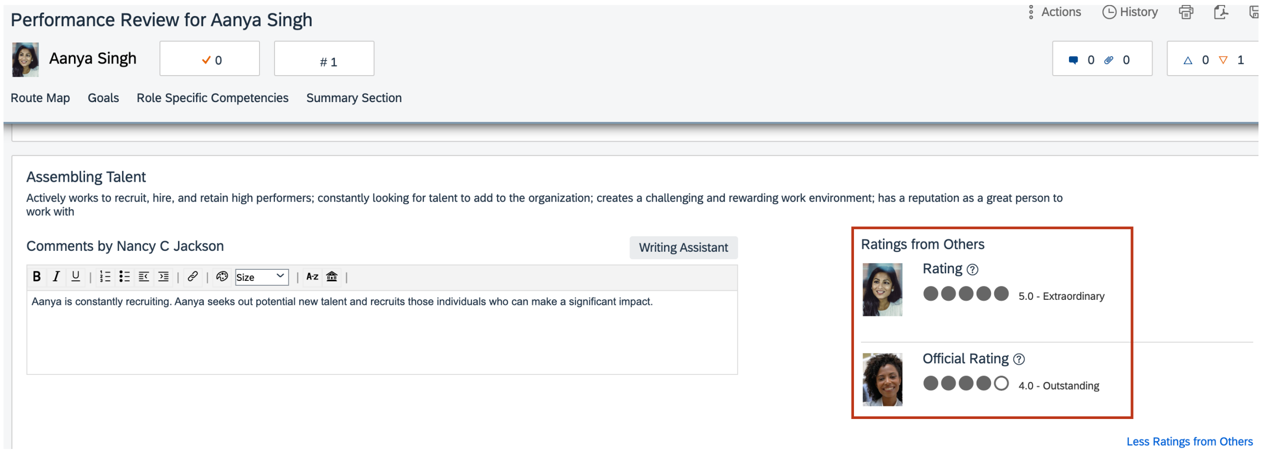
The rating field for employees or managers is shown on the form as follows. In the PDF and print version, the official rating and subject rating are available.



Employee's View



Manager's View



Matrix Manager's View

> **i Note**
>
> You can find the XML language of the fields in the following table.
>
> | Field Name | XML Language |
> | --- | --- |
> | Item Rating | `item-rating` |
> | Unofficial User Rating | `item-cmt-rating` |
> | Subject Rating | `subject-item-rating` |
>
> For Rating Option 0, 1, and 2, the *Ratings from Others* tab shows unofficial ratings and comments only.

Related Information

Configuring Form Permissions [page 75]
Field Permissions [page 82]

5.3.1.2 Auto-Populate and Auto-Sync

Goals in a goal plan are auto-populated to a Performance Management form. When the form is created, all goals created in the goal plan are included on the form. Goals can also be auto-synchronized between a goal plan and a form.

The following tables describe how auto-populate and auto-sync work.

Auto-Populate and Auto-Sync from Goal Plans to Forms

Changes Made in a Goal Plan	How Auto-Populate Handles This	How Auto-Sync Handles This
Add a goal after the form is created	New goal doesn't appear	New goal appears

Changes Made in a Goal Plan	How Auto-Populate Handles This	How Auto-Sync Handles This
Add a goal before the form is created	New goal appears	New goal appears
Add a target or a task to an existing goal	New target or task appears	New target or task appears
Edit an existing goal, such as targets, tasks, and goal names	Changes appear	Changes appear
Remove a goal	The goal still appears and is not deleted	The goal is deleted without any warning message

Auto-Populate and Auto-Sync from Forms to Goal Plans

Changes Made on a Form	How Auto-Populate Handles This	How Auto-Sync Handles This
Add a goal	New goal appears	New goal appears
Add a target or a task to an existing goal	New target or task appears	New target or task appears
Edit an existing goal, such as targets, tasks, and goal names	Changes appear	Changes appear
Remove a goal	The goal still appears and is not deleted	The goal is deleted without any warning message **Note** If you use the latest Goal Management and you enabled the auto-sync feature in Performance Management, please be aware of the following: • Users can delete a goal on a Performance Management form only when they have the *User Permissions* > *Objectives* > *Objective Plan Permissions* role-based permission to the goal plan of that goal. The goal deleted from the form will also be deleted from the goal plan. • Users without the permission can't see the button to delete the goal on the form.

Note

- When a form is in the modify stage, changes in a goal plan are synced to the form. When the form is in the signature or completion stage, the changes aren't synced to the form.
- Auto-sync on a form works when the form is saved.

- If goals are auto-populated to multiple goal sections based on goal categories, we do not recommend you also use auto-sync. This is because changing the category of a goal in the goal plan will move the goal to a different section in the form. While the goal is moved to the new section correctly, any ratings and comments associated to the goal are not moved and get lost.

5.3.1.3 Goal Ratings from Metric Lookup Tables

You can view the ratings of the metric-based goals on Performance Management forms. The ratings calculated through a metric lookup table in a goal plan are populated to forms when the forms use star ratings for a 3-point or a 5-point rating scale.

If goals on the forms are metric-based, the rating is calculated based on the metric value. For example, Rating 3 has a metric value of 20.00, Rating 2 has a metric value of 15.00, and Rating 1 has a metric value of 10.00. If an employee achieves a metric value of 19.99, which falls between Rating 2 and Rating 3, the employee rating would be 2.

When metric lookup tables are used, but the value doesn't match the rating scale, only the star rating and the rating value are displayed. The rating label is not displayed. For example, if a rating scale includes 1.0 - Unsatisfactory, 2.0 - Needs Development, 3.0 - Meets Expectations, 4.0 - Exceeds Expectations, and 5.0 - Substantially Exceeds Expectations, and an employee is given a rating of 2.75, a two-and-half-filled star rating is displayed with the rating value 2.75. The label "Needs Development" is not displayed.

When metric lookup table ratings are used, the official rating field of each goal is populated with the corresponding metric lookup table rating. Generally, other ratings like unofficial user rating and subject rating are not needed. So, in a performance review step, if official rating is displayed to users, they can't edit unofficial user rating or subject rating, despite that they have write permission for these ratings.

→ Tip

- If customers use metric lookup table ratings, we recommend that they use rating option 0.
- If customers want both employees and managers to provide ratings, we do not recommend that they use metric lookup table ratings.

i Note

When a form template is configured to populate goal ratings from the metric lookup table, at least read permission should be granted to the related fields of the metric lookup table (for example, rating field, actual-achievement field) in the goal template. Otherwise, goal ratings in the Performance Management forms and goal plans might be inconsistent. For more information about goal ratings, refer to Metric Lookup Basics.

Related Information

Metric Lookup Basics

5.3.2 Competency Section

Competency sections are used to evaluate employees' competencies during a performance review. A Performance Management form can include three competency sections, respectively for job-specific competencies, core competencies, and custom competencies.

→ Recommendation

To optimize system performance, especially when you use Internet Explorer, we recommend that no more than 60 competencies are rated on a form.

Learn about the fields and options that you can configure and select for the competency section in the following table.

Field or Option	Description
Section Name	The name of the section that is shown on the form
Section Description	The description of the section that is shown on the form
Section Type	The competency section supports the following competency types. One section is for one type. • *Job Specific*: Role-specific competencies are populated on the form based on the employee's job role and job code. • *Core*: Core competencies of your company • *Custom*: Custom competencies that are defined in the instance. After selecting this option, choose *Show advanced options* > *[X] Custom Competency defined. Click to modify* to add custom competencies.
Unable to Rate	The label of a special rating on the rating scale, for example, Too New to Rate. Performance reviewers can select this rating when they think it's too early to give a regular rating for a competency of an employee. If you already configured this field in *General Settings*, you don't need to configure it again here.

Field or Option	Description
Allow users to add competencies	Users can select competencies from your competency library and add them to the form, and also remove competencies from the section. They can add the same competency to the form only once. ⚠ Caution If you configure the template to rate on behaviors, users can add the same competency with different behaviors to different sections. When the rating or comment of a competency in one section is updated, that in other sections is updated as well. To avoid confusion, users should add one competency to the form only once. You can enable the add and remove actions for specified roles and steps by configuring action permissions.
Show behaviors	The behaviors assigned to competencies are shown on the form. You can select the following options for *Display Mode*: • *Display Behaviors below Competency Rating*: Behaviors are shown below the competency rating. • *Display Behaviors above Competency Rating*: Behaviors are shown above the competency rating. You can also select *Filter By Job Code* to show only the role-specific behaviors on the form. When a competency is assigned with the behaviors of multiple job roles, only the behaviors of the employee's job role are shown. To allow users to rate behaviors instead of competencies, select *Rating on behavior*. → Recommendation We recommend that you use XML template to configure ratings and comments on behaviors. For more information, see Rating Behaviors in Related Information.
Include the ability to rate	Users can rate on each competency. See the Rating Options topic in Related Information.
Include a comment for each item	Users can comment on each competency.
Include an overall comment	Users can give an overall comment on the competency section.
Include in overall competency rating calculation	Ratings in this section are included in the calculation of the overall competency rating. The option is useful if you have multiple competency sections and want to leave one section out of the calculation.
Display in competency section	Competencies in this section are listed in the goal competency summary section.

Field or Option	Description
Show expected competency rating	The expected rating of competencies for the job role is shown along with the actual rating. The option is useful to view the gap between an employee's expected and actual performance. **Note** • If users add a competency to the form by role and the competency has an expected rating, the expected rating is displayed on the form along with the added competency. If the competency is assigned to multiple roles with different expected ratings, only the expected rating of the selected role is displayed. • If you've upgraded to Talent Intelligence Hub, this configuration is **not** yet supported when users add competencies to the form through the picker. Users won't see expected ratings next to the competencies added to the form.
Include in overall performance summary section rating	Ratings in this section are included in the calculation of the performance rating in the performance potential summary section.
Total Weight	Target total weight for the competencies in this section
Include the ability to enter in a weight	Users can edit the weight of each competency.
Display section in summary	The rating and weight of competencies are shown in the summary section.
Show calculated section rating	The calculated competency rating is shown in the summary section.
Rating Scale	The rating scale used in this section. If you've selected a rating scale in *General Settings*, you don't need to select it again here.
Hide numeric rating values (only show text labels)	Select the checkbox to show on the form only the rating labels defined in *Rating Scales*. When the rating scale has no more than five rating levels, if you select this option, the rating field on the form becomes a dropdown list showing rating labels only. When the rating scale has more than five rating levels, the default rating field is a dropdown list showing both rating values and labels. If you select this option, the dropdown list shows rating labels only.
Default Rating	The label that is shown in the rating field if users haven't rated on competencies
Choose an alternate label for the rating field	The label of the official rating field

Related Information

Rating Behaviors [page 126]
Rating Options [page 51]
Action Permissions [page 81]

5.3.2.1 Enabling Capability Picker to Add Competencies

If Job Profile Builder is enabled in your instance and data migration to Job Profile Builder is successful, you can enable the Capability Picker for users to add competencies to Performance Management forms.

Prerequisites

- You have selected *JDM v2.0/Skills Management* and migrated Families/Roles/Competencies from JDM 1.0 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.

- The permission of *Performance Management Feature Settings* under *Manage System Properties* is granted.

Context

The Capability Picker retains the features of the Competency Picker, for example,

- If you configure specific competency categories in the form template, only the competencies from those categories are shown.
- If you use behaviors, only the competencies that have behaviors are shown.

Compared to the Competency Picker, the Capability Picker allows users to select competencies by competency libraries or job roles in a hierarchy structure and to search for the competencies using keywords.

Procedure

1. In Admin Center, go to *Performance Management Feature Settings*.
2. Select *Enable Capability Picker*.
3. Choose *Save*.

Results

Users can use the Capability Picker to add competencies to forms.

5.3.3 Summary Section

The summary section displays the calculated form rating that is based on the ratings from goal and competency sections. You can also enable manual rating, which is the official rating of the form when enabled.

The summary section also displays summarized information from all other sections in one central place. It displays a list of goals and competencies with their official rating and weight.

Learn about the fields and options that you can configure and select for the summary section in the following table.

Field or Option	Description
Section Name	The name of the section that is shown on the form
Section Description	The description of the section that is shown on the form
Allow manual rating	Users can manually give the overall form rating to override the calculated form rating. **Note** There is only one manual rating field, and anyone who has permission for it can update the rating. For customers who want employees to manually give an additional overall form rating, they may need to create a custom section that includes a custom field for employees to record the rating.
Weights	The weight of each goal and competency section for the calculated form rating. You can choose *Weight Section Equally* or manually enter weights for different sections, which should add up to 100%.
Allow Override of Unrated Manual Rating	With the manual rating enabled, this option allows the calculated rating to overwrite the unrated manual rating when the form is sent to the next step.
Show Section Comment	Users can enter comments in this section.
Enable "Enforce Maximum Overall Score"	With the manual rating enabled, this option sets the maximum overall score that can be given based on the ratings at the goal or competency level. See Configuring Enforce Maximum Overall Score for more information.
Default Rating	The label that is shown in the rating field if users haven't rated
Choose an alternate label for the rating field	The label of the official rating field

Field or Option	Description
Unable to Rate	The label of a special rating on the rating scale, for example, Too New to Rate. Performance reviewers can select this rating when they think it's too early to give a regular rating for an employee. If you already configured this field in *General Settings*, you don't need to configure it again here.

> **Note**
>
> The rating scale used in the summary section is set in *Manage Templates* > *General Settings*.

Related Information

Configuring Enforce Maximum Overall Score [page 66]

5.3.3.1 Configuring Enforce Maximum Overall Score

When you configure Enforce Maximum Overall Score (EMOS), you set limitations on the rating that a specified role can give to an employee.

Context

EMOS, also known as "Fail one, fail all", allows you to set a maximum possible overall score to be selected by the rater, based on the ratings at the goal or competency level. The rater can't give a score that is higher than you set.

Procedure

1. In Admin Center, go to *Manage Templates*.
2. Open a form template and select the summary section.
3. Select *Allow manual rating*.
4. Choose *Show advanced options* and select *Enable "Enforce Maximum Overall Score"*.
5. Choose *Configure "Enforce Maximum Overall Score". Click to modify* at the bottom of the page.

   The *"Enforce Maximum Overall Score" Configuration* dialog box pops up.
6. Specify the parameters in the dialog box.

For example, you can select manager as the role for whom EMOS configuration will be applied. Goal ratings are "Needs Development" or below and competency ratings are "Unsatisfactory" or below, and the maximum overall score that manager can give is "Meets Expectations".

7. Choose *Done* and save the template.
   When EMOS is configured, only the available ratings are shown on the rating scale.

5.3.4 Goal Competency Summary Section

The goal competency summary section calculates the OCOC rating, overall goal rating, and overall competency rating, and allows users to edit the last two ratings.

- OCOC rating: The overall calculated goal and competency rating. It is the overall form rating if no summary section or performance potential summary section is used. If the overall goal rating or overall competency rating can be edited, the OCOC rating is calculated based on the manual rating.
- Overall goal rating: An aggregate of ratings from the goal sections on the form.
- Overall competency rating: An aggregate of ratings from the competency sections on the form.

The section can be configured to show a chart of goal and competency ratings. The overall goal rating and overall competency rating of an employee determine the quadrant in which the employee falls.

Use

We recommend that customers use the goal competency summary section on the form if they want to use the overall goal rating and overall competency rating in other modules, for example:

- Matrix Grid Report of How vs What in Succession Management
- Overall Competency and Overall Goal blocks in People Profile

> → Tip
>
> If you don't configure the goal competency summary section, you can export the overall goal rating and overall competency rating and import them to the other modules accordingly.

> i Note
>
> To use the goal competency summary section, make sure that X and Y axes are configured as Competency and Objective in *Matrix Grid Reports: How vs. What*.

Configuration

Learn about the fields and options that you can configure and select for the goal competency summary section in the following table.

→ Recommendation

We recommend that you use the XML template to configure the goal competency summary section. See Goal Competency Summary Section (objcomp-summary-sect) for more information.

Field or Option	Description
Section Name	The name of the section that is shown on the form
Description	The description of the section that is shown on the form
Show Section Comment	Comment for the section is enabled.
Calculate overall competency rating	*Calculated Form Rating* for competencies is enabled. It is the field for the calculated rating. **Note** Because the overall competency rating is calculated based on the ratings from the competency sections, *Include in overall Competency rating calculation* needs to be selected in the competency sections.
Allow overall competency rating to be edited	*Overall Form Rating* for competencies is enabled. It is the field for the manual rating. Users can manually give the overall competency rating. The rating scale used is configured in *Matrix Grid Rating Scales*. See Configuring Matrix Grid Rating Scales for more information.
Calculate overall objective rating	*Calculated Form Rating* for goals is enabled. It is the field for the calculated rating. **Note** Because the overall goal rating is calculated based on the ratings from the goal sections, *Include in overall Goal rating calculation* needs to be selected in the goal sections.
Allow overall objective rating to be edited	*Overall Form Rating* for goals is enabled. It is the field for the manual rating. Users can manually give the overall goal rating. The rating scale used is configured in *Matrix Grid Rating Scales*. See Configuring Matrix Grid Rating Scales for more information.
Show overall objective / competency rating	*OCOC Rating* is enabled.
Display the overall objective / competency matrix	A chart of goal and competency ratings is enabled.
Overall Rating Display Order	Only the *manual-calc* option is supported. The manual rating is always shown above the calculated rating.

Field or Option	Description
Section Display Order	• comp-obj: Competency sections are shown above goal sections. • obj-comp: Goal sections are shown above competency sections

Related Information

Goal Competency Summary Section (objcomp-summary-sect) [page 132]

5.3.4.1 Configuring Matrix Grid Rating Scales

Configure the rating scales for the overall goal rating, overall competency rating, performance rating, and potential rating, so that they can be used when users manually give those ratings.

Prerequisites

For customers who don't have a Succession Planning license or don't enable the module, make sure that the following prerequisites are met.

1. *Matrix Grid Report (9-Box)* in Provisioning 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.

2. The permission of *Matrix Grid Rating Scales* under *Manage Succession* is granted.

Context

If you change a rating scale that in-progress forms are using, the rating scale on the forms is updated.

Procedure

1. In Admin Center, go to *Matrix Grid Rating Scales*.

2. Select any of the following rating scales and choose *Edit*.
    - Performance
    - Potential
    - Competency
    - Objective

    The name of the rating scales can't be edited.
3. Select a scale size from 1 to 20 and choose *Set*.
4. Enter a description for each value.

    The rating value and description are shown together on the form.
5. Choose *Save Changes*.

5.3.5 Performance Potential Summary Section

The performance potential summary section allows users to manually give the performance rating and potential rating.

Use

The section can be configured to show a chart of performance and potential ratings. The performance rating and potential rating of an employee determine the quadrant in which the employee falls. If users can edit both performance and potential ratings, they can drag employee names from one block on the chart to another in order to change performance and potential ratings.

Users have the following options to include additional employees on the chart.

- *All employees assessed*: Displays employees (Employee role) who have a form required as follows:
    - The form should be created from the same template as the current form.
    - The current user should be a defined role in the route map of the form.

    Forms that have been completed within the last 60 days are included.

    > **Note**
    >
    > With this option, if a manager also has a form created from the same form template, they can see themselves on the chart based on the ratings given by their manager. To prevent this, you can set a filter for this option. See Setting Filters for Display Options for more information.
- *My direct reports*: Displays users' direct reports who have a form required as follows:
    - The form should be created from the same template as the current form.
    - The current user should be a defined role in the route map of the form.

    Forms that have been completed within the last 60 days are included. If you've set filters for the previous option, this option doesn't work.

ℹ Note

Selected options remain effective the next time users open any Performance Management forms with the chart configured.

Configuration

Learn about the fields and options that you can configure and select for the performance potential summary section in the following table.

Field or Option	Description
Section Name	The name of the section that is shown on the form
Section Description	The description of the section that is shown on the form
Show Section Comment	Users can enter comments in this section.
Allow overall performance rating to be edited	Users can manually give the performance rating. The rating scale used is configured in *Matrix Grid Rating Scales*. See Configuring Matrix Grid Rating Scales for more information.
Allow overall potential rating to be edited	Users can manually give the potential rating. The rating scale used is configured in *Matrix Grid Rating Scales*. See Configuring Matrix Grid Rating Scales for more information.
Display the overall performance-potential matrix	A chart of performance and potential ratings is enabled.
Section Display Order	• Performance section/Potential section: The performance rating is shown above the potential rating. • Potential section/Performance section: The potential rating is shown above the performance rating.

Notes

Please note the following impacts when you use the performance potential summary section.

- Overall Form Rating
  A form can be configured with both the performance potential summary section and summary section. The performance rating in the performance potential summary section is used as the overall form rating. The rating is also used for reporting and other modules, for example, calibration sessions. If you disable the performance rating in the performance potential summary section, the overall form rating is not available.

  → Recommendation

  In case that users give a manual rating in the summary section, we recommend that rating scales should be consistent in both sections, including the Unrated and Too New to Rate configurations. So, the rating in the performance potential summary section is updated automatically.

- Section Weights of Goal and Competency Sections

When the performance potential summary section is used, section weights are not displayed beside the name of goal and competency sections. This is because the performance rating is not calculated based on the rating and weight of goals and competencies, but by the rating from this section.

- Ad Hoc Reports
  - If both performance potential summary section and summary section are configured, only section comments are stored in the summary section of ad hoc reports.
  - If the performance potential summary section is not configured, both overall form rating and section comments are stored in the summary section of ad hoc reports.

Related Information

Configuring Matrix Grid Rating Scales [page 69]

5.3.6 Customized Weighted Rating Section

The Customized Weighted Rating section shows the calculation details that arrive at the calculated rating, including route steps, roles in each step and their names, ratings, and weights configured in business rules.

Use

> ⚠ Caution
>
> If you want to continue to use the form templates created in 1H 2020, you must configure the rating scale for the Customized Weighted Rating section in *Manage Templates*. This configuration is required so that you can launch forms based on the configured form templates. For the forms launched in 1H 2020, the rating scale for the Customized Weighted Rating section inherits the same rating scale as used in 1H 2020.

The Customized Weighted Rating section supports two overall scores: the calculated rating and the manual rating. The calculated rating is calculated based on the ratings given by roles in a route map and the weights configured in business rules. The calculation can be triggered at a certain step. The manual rating is the official rating when both the calculated rating and the manual rating are available. If there's only a calculated rating, this rating becomes the official rating.

> i Note
>
> If the manual rating is enabled, the manual rating is defaulted to *Unrated*. However, if you select *Allow Override of Unrated Manual Rating*, the calculated rating will override the unrated manual rating when the form is sent to the next step. In this case, the calculated rating is rounded to a label that applies to the rating scale score for the section. Therefore, if you want to use the manual rating as the official rating, you always need to rate the manual rating after it's enabled.

When the Customized Weighted Rating section provides a calculated rating at the step after the business rules are triggered, the rating takes priority over the overall ratings in the Summary section, the Objective Competency Summary section, and the Performance Potential Summary section.

The following table explains the information listed in the *Previous Ratings* table:

Field	Description
Rating	The rating that the role gives. **Note** If the rating scale that applies to the overall form rating is different from that mapped to the Customized Weighted Rating section, the overall form rating is normalized to the rating scale for the Customized Weighted Rating section. To know how the rating is shown, see the description of *Hide numeric rating values (only show text labels)* in the table of the **Configuration** section.
Name	The name of the role who gives the rating.
Role	The role who gives the rating.
Route Step	The route step at which the role gives the rating.
Weight	The weight configured for each role in business rules.

In the En Route folder, the login role's rating and the ratings given by other roles in previous steps are listed in the *Previous Ratings* table. After the form goes to the Completed folder, the login role can get a complete view of the ratings that are given by all roles in the *Previous Ratings* table.

Configuration

Learn about the fields and options that you can configure and select for the Customized Weighted Rating section in the following table.

Field or Option	Description
Unable to Rate	The label of a special rating on the rating scale, for example, Too New to Rate. Performance reviewers can select this rating when they think it's too early to give a regular rating for an employee.
Allow manual rating	If selected, allow users to manually override the calculated rating on the form. All reporting of employees' scores rely on the manual rating instead of the calculated rating.
Allow Override of Unrated Manual Rating	If a manual rating is enabled, select this option to allow the calculated rating to override the unrated manual rating when the form is sent to the next step.

Field or Option	Description
Rating Scale	Select a rating scale applicable to the section. **Note** After you've added the section, its rating scale inherits the form's rating scale. You can select a different rating scale for the section.
Hide numeric rating values (only show text labels)	If a rating's numeric value is mapped to a certain label for the manual rating's rating scale scores of the section, • If the option is selected, a rating appears as the label. • If the option isn't selected, the label is shown next to a rating's numeric value. If a rating's numeric value can't be mapped to a certain label, a rating is shown as its numeric value, whether you select this option or not.
Section permissions	Configure the section permissions for roles and route steps.
Field permissions	Configure the field permissions with Calculated Rating and Manual Rating.

Limitations

- In the *Team Overview* page, the overall rating in the Customized Weighted Rating section isn't shown.

Related Information

Scenarios with Overall Customized Weighted Rating Calculation [page 241]

5.4 Configuring Form Permissions

By default, all roles in all steps are granted with all form permissions, including permissions for buttons, tabs, sections, actions, and fields. You can configure the form template to allow a role to have or not to have a specific permission in a specific step.

Procedure

1. In Admin Center, go to *Manage Templates*.
2. Open a form template.
   - To configure button permissions and tab permissions, choose *General Settings*.
   - To configure section permissions, action permissions, and field permissions, choose *Edit Fields and Sections* and select a form section.
3. Select one of the following options to configure your desired permissions.

Option	Description
0 Button Permission(s) defined. Click to modify.	For configuring the permission for buttons and pods on the form. For more information, see the Button Permissions topic.
0 Other's Rating Tab Permission(s) defined. Click to modify.	For configuring the permission for the *Ratings from Others* tab on the form. For more information, see the Tab Permissions topic.
0 Section Permission(s) defined. Click to modify.	For configuring the permission for sections on the form. For more information, see the Section Permissions topic.
0 Action Permission(s) defined. Click to modify.	For configuring the permission for actions on the form. For more information, see the Action Permissions topic.
0 Field Permission(s) defined. Click to modify.	For configuring the permission for fields on the form. For more information, see the Field Permissions topic.

   The configuration dialog box appears.

4. Choose *Add Another* and configure the following fields.

Field	Description
Type	The type of different form permissions varies. For more information on the available types of each permission, see the related topics of the permissions.
Roles	• *All*: You grant the defined permission to all roles. • *Selected*: You grant the defined permission to the roles you selected. • *Custom*: You grant the defined permission to the custom roles you entered.
Route Steps	• *All*: You grant the defined permission to specific roles in all steps.

Field	Description
	• *Selected*: You grant the defined permission to specific roles in the steps you selected.
Buttons	For button permissions only. For more information on the options, see the Button Permissions topic.
Actions	For action permissions only. For more information on the options, see the Action Permissions topic.
Add Field	For field permissions only. For more information on the options, see the Field Permissions topic.

5. Repeat Step 4 to define more permissions as necessary.

> **i Note**
>
> The permission that you configured first is overridden by the permission that you configured last.

> **→ Recommendation**
>
> If you want to grant permissions to some roles, define the none permission to all roles in all steps first, and then grant permissions to the desired roles.
>
> If you want to grant access to a field when the form is completed, grant the read permission in all steps first, and then either grant the write permission or hide the field in particular steps.

6. Choose *Done* in the dialog box and choose *Save* on the page.

5.4.1 Button Permissions

Learn about the button permission type and the permission-configurable buttons and pods on the Performance Management form.

Permission Type

Permission	XML Value	Description
None	`none`	The button or pod is disabled on the form.
Enabled	`enabled`	The button or pod is enabled on the form.

The permission type only applies to permitted roles in some or all steps.

Button List

Button	XML Value	Description	Note
Reject	`reject`	Used to send the form from a signature step to the last modify step.	
Finalize Form	`send`	Used to send the form to the next step.	To configure this button, *Disable Send button* shouldn't be selected in *Form Template Settings*.
Sign	`sign`	Used to sign the form in a signature step.	
Send to Previous Step	`send-back`	Used to send the form to the previous step.	To configure this button, • *Enable form routing to previous step* should be selected in *Form Template Settings*. • *Enable Previous Step Button* should be selected in *Manage Templates* > *General Settings*.
Delete Form	`delete`	Used to delete the form from the instance.	To configure this button, • *Disable Form button* shouldn't be selected in *Form Template Settings*. • *Enable Delete Button* should be selected in *Manage Templates* > *General Settings*.
Get Comments	`get-comments`	When you enable the Get Feedback feature, the buttons are used to send the form to selected users for ratings and comments. For more information, see the Get Feedback topic in Related Information.	
Get Edits	`get-edits`		
Add Modifier	`add-modifier`	Used to add users to edit the form. For more information, see Add Modifier.	You can configure the permission for these buttons only in an XML form template.
Add Signer	`add-signer`	Used to add users to sign the form and remove the added signers respectively. For more information, see Add Signer and Remove Signer.	

Button	XML Value	Description	Note
Remove Signer			

Pod List

Pod	XML Value	More Information
Overall Score	`overall-score-pod`	Overall Score Pod [page 181]
Incomplete Items	`incomplete-items-pod`	Incomplete Items Pod [page 181]
Team Ranker	`team-rank-pod`	Team Ranker Pod [page 182]
Supporting Information	`supporting-information-pod`	Supporting Information Pod [page 182]
Gap Analysis	`gap-analysis-pod`	Gap Analysis Pod [page 183]

Button Prioritization

To optimize user experience, a maximum of five buttons are shown at the bottom of the form. Except *Save and Close* and *Cancel*, which are always visible, other buttons are shown based on your selection and the predefined prioritization order.

If you enable no more than three buttons, all the buttons are shown. If you enable more than three buttons, according to the following prioritization, some buttons are shown and others are included in the *More Actions* button.

1. *Finalize Form* / *Sign* / *Confirm 1:1* (Only one of the buttons is shown at a time)
2. *Reject*
3. *Send to [username]* (For iterative steps only)
4. *Get Feedback* / *Recall Feedback*
5. *Send to Previous Step*
6. *Add Modifier*
7. *Add Signer*

> Example
>
> If you enable *Finalize Form*, *Get Feedback*, and *Add Signer*, three buttons are shown along with *Save and Close* and *Cancel*.
>
> If you enable one more button *Add Modifier*, *Add Modifier* and *Add Signer* are included in *More Actions*, which is shown along with other four buttons.

Related Information

Get Feedback [page 214]
Add Modifier [page 172]
Add Signer and Remove Signer [page 173]

5.4.2 Tab Permissions

Learn about the tab permission type and the permission-configurable tabs on the Performance Management form.

Permission Type

Permission	XML Value	Description
None	none	The tab is disabled on the form.
Enabled	enabled	The tab is enabled on the form.

The permission type only applies to permitted roles in some or all steps.

Tab List

Section	Tab	XML Value	Description	Note
Goal Competency	Ratings from Others	• To configure the permission in the meta section: <others-ratingtab-permission> • To configure the permission in a specific section: others-rating	Used to show other users' ratings.	You can configure the permission for this tab in *Manage Templates* or an XML form template.
Goal	Goal Details	goal-details	Used to show goal details from Goal Management.	You can configure the permission for these tabs only in an XML form template.
	Other Details	other-details	Used to show other details of goals.	

Section	Tab	XML Value	Description	Note
	Achievements	`achievements`	Used to show the achievements associated with goals from Performance Management.	
	Learning Activities	`learning-activities`	Used to show the learning activities associated with development goals from Career Development Planning. This tab is only applicable to development goal sections.	
Competency	Last Rating	`last-review-rating`	Used to show the last competency rating.	

5.4.3 Section Permissions

Learn about the section permission type and the permission-configurable sections on the Performance Management form.

Permission Type

Permission	XML Value	Description
Hidden	`hidden`	Users can't view the section.
Disabled	`disabled`	Users can view the section, but can't edit it.
Enabled	`enabled`	Users can view and edit the section.

The permission type only applies to permitted roles in some or all steps.

Section List

Section	Permission-Configurable
Introduction	Yes
Review Dates	Yes
Employee Information	Yes

Section	Permission-Configurable
Goal	Yes
Competency	Yes
Summary	Yes
Goal Competency Summary	Yes
Performance Potential Summary	Yes
Customized Weighted Rating	Yes
Signature	Yes
Mid Year	Yes
Custom	Yes
Additional Comments	No

5.4.4 Action Permissions

Learn about the action permission type and the permission-configurable actions on the Performance Management form.

Permission Type

Permission	XML Value	Description
None	`none`	Users can't add goals, remove goals, add competencies, or remove competencies.
Enabled	`enabled`	Users can add goals, remove goals, add competencies, or remove competencies.

The permission type only applies to permitted roles in some or all steps.

Action List

Section	Action	XML Value	Description	Note
Goal	Add Item	`add-item`	Users choose *Add Goal* to add goals to the goal section.	To configure these actions, *Allow users to add/remove Goals within the section* should be selected in

Section	Action	XML Value	Description	Note
	Remove Item	`remove-item`	Users choose 🗑 *(Delete Goal)* to remove goals from the goal section.	▶ *Manage Templates* › *Goal Section* ›.
Competency	Add Item	`add-item`	Users choose *Add Competency* to add competencies to the competency section.	To configure these actions, *Allow users to add competencies* should be selected in ▶ *Manage Templates* › *Competency Section* ›.
	Remove Item	`remove-item`	Users choose 🗑 *(Delete Competency)* to remove competencies from the competency section.	

5.4.5 Field Permissions

Learn about the field permission type and the permission-configurable fields on the Performance Management form.

Permission Type

Permission	XML Value	Description
None	`none`	Users can't view the field.
Read	`read`	Users can view the field, but can't edit it.
Write	`write`	Users can view and edit the field. **i Note** For all calculated rating fields, the write permission is regarded as the read permission.

The permission type only applies to permitted roles in some or all steps.

Field List

Section	Field	XML Value	Description	Note
Goal	Item Rating	`item-rating`	The official rating field of a goal or competency	

Section	Field	XML Value	Description	Note
Competency	Unofficial User Rating	`item-cmt-rating`	The unofficial rating field of a goal or competency	To configure this field, you should use Rating Option 1 or 2.
	Item Weight	`item-weight`	The weight field of a goal or competency. With the write permission, users can choose *(Edit Weight)* next to *% of total score* to edit the weight.	To configure this field, *Include the ability to enter in a weight* should be selected in *Manage Templates* > *Goal or Competency Section*.
	Section Weight	`sect-weight`	The weight field of the goal section or competency section. With the write permission, users can choose *(Edit Weight)* next to *% of total score* in the summary section or goal competency summary section to edit the weight.	To configure this field, • *Show section weights* and *Do not lock down section weights* should be selected in *Form Template Administration* in Provisioning. • For the goal section: *Display section in summary* and *Display in Goal section* should be selected in *Manage Templates* > *Goal Section*. • For the competency section: *Display Section in Summary* and *Display in Competency section* should be selected in *Manage Templates* > *Competency Section*.

Section	Field	XML Value	Description	Note
	Item Comments	`item-comments`	The comment field of a goal or competency	To configure this field, *Include a comment for each item* should be selected in *Manage Templates* > *Goal or Competency Section*.
	Subject Rating	`subject-item-rating`	The rating field of a goal or competency for the form subject	To configure this field, you should use Rating Option 3.
	Section Comments	`section-comments`	The comment field of the goal section or competency section **Note** For the permission of section comments, apart from defining type, roles, and route steps, you also need to select the owner roles who provide the comments. Therefore, you define whose section comments the permitted roles can read or edit.	To configure this field, *Include an Overall Comment* should be selected in *Manage Templates* > *Goal or Competency Section*.
	Item Group	`item-group`	The goal or competency group	You can configure the permission for these fields only in an XML form template.
	Expected Rating	`expected-item-rating`	The expected rating field of competencies. Only available in the competency section.	
Summary	Section Comments	`section-comments`	The comment field of the summary section	To configure this field, *Show Section Comment* should be selected in *Manage Templates* > *Summary Section*.
	Manual Overall Rating	`manual-overall-rating`	The rating field in the summary section where users give the overall form rating.	To configure this field, *Allow manual rating* should be selected in *Manage Templates* > *Summary Section*.

Section	Field	XML Value	Description	Note
	Calculated Overall Rating	`calculated-overall-rating`	The rating field in the summary section where the calculated overall form rating is shown	
Goal Competency Summary	Section Comments	`section-comments`	The comment field of the goal competency summary section	To configure this field, *Show Section Comment* should be selected in *Manage Templates* > *Goal Competency Summary Section*.
	Competency Manual Overall Rating	`comp-manual-overall-rating`	The rating field in the goal competency summary section where users give the overall competency rating	To configure this field, *Allow overall competency rating to be edited* should be selected in *Manage Templates* > *Goal Competency Summary Section*.
	Objective Manual Overall Rating	`obj-manual-overall-rating`	The rating field in the goal competency summary section where users give the overall goal rating	To configure this field, *Allow overall objective rating to be edited* should be selected in *Manage Templates* > *Goal Competency Summary Section*.
	Calculated Overall Competency Rating	`comp-calculated-overall-rating`	The field in the goal competency summary section where the calculated overall competency rating is shown	You can configure the permission for these fields only in an XML form template.
	Calculated Overall Goal Rating	`obj-calculated-overall-rating`	The field in the goal competency summary section where the calculated overall goal rating is shown	
Performance Potential Summary	Manual Performance Rating	`manual-performance-rating`	The rating field in the performance potential summary section where users give the performance rating	To configure this field, *Allow overall performance rating to be edited* should be selected in *Manage Templates* > *Performance Potential Summary Section*.

Section	Field	XML Value	Description	Note
	Manual Potential Rating	`manual-potential-rating`	The rating field in the performance potential summary section where users give the potential rating	To configure this field, *Allow overall potential rating to be edited* should be selected in *Manage Templates* > *Performance Potential Summary Section*.
Customized Weighted Rating	Manual Rating	`cwr-manual-rating`	The rating field in the customized weighted rating section where users give the overall form rating	To configure this field, *Allow manual rating* should be selected in *Manage Templates* > *Customized Weighted Rating Section*.
	Calculated Rating	`cwr-calculated-rating`	The rating field in the customized weighted rating section where the calculated overall form rating is shown	
Custom	Section Comments	`section-comments`	The comment field of the custom section	To configure this field, *Show Section Comments* should be selected in *Manage Templates* > *Custom Section*.

5.5 Configuring Required Fields

Configure required fields in a specific step to require users to complete the fields before they send the form to the next step.

Procedure

1. In Admin Center, go to *Manage Templates* and open a form template.
2. Choose *Edit Fields and Sections* and select a section in which you want to configure required fields.
3. Choose *Show advanced options* and *0 Required Field Permission(s) defined. Click to modify*.

   The *Required Field Permissions* dialog box appears.
4. Choose *Add Another* to configure the actions, roles, and steps for the required fields to take effect.

Field	Description
Send Action	Users must complete the required fields before they can take the following actions: • *Next Step*: Send the form to the next step • *Sign*: Sign the form **Note** To make required field configuration take effect when users send the form to another user in an iterative step, you need to configure the send action in XML template.
Roles	The following roles must complete the required fields: • *All*: All roles • *Selected*: The roles you selected • *Custom*: The custom roles you entered
Route Steps	Users must complete the required fields in a specific step or all steps: • *All*: All steps • *Selected*: The steps you selected

5. Choose *Add Field* and select at least one field.

Section	Field
Goal Competency	Item Rating
	Unofficial User Rating
	Item Weight
	Section Weight
	Item Comments **Note** If you select the *Item Comments* or *Section Comments* field, you can set a minimum character limit and a maximum character limit in *Minimum Value* and *Maximum Value* respectively. The default value is -1. Please enter a positive number for the minimum value.
	Subject Rating
	Section Comments
Summary Section	Section Comments
	Manual Overall Rating
Goal Competency Summary Section	Section Comments
	Competency Manual Overall Rating
	Objective Manual Overall Rating

Section	Field
Performance Potential Summary	Manual Performance Rating
	Manual Potential Rating
Signature Custom	Section Comments **i Note** To configure this field in the signature section, *Include comment* should be selected in *Manage Templates* > *Signature Section*.

> **i Note**
>
> You can set multiple fields as required fields with the same configuration by choosing *Add Field*.
>
> For more information on the description of the fields listed above, see Field Permissions in Related Information.

6. Repeat Steps 4 and 5 to configure more required fields in a section as necessary.
7. Choose *Done* in the dialog box and choose *Save* on the page.

Results

The required fields will appear with a red asterisk (*) on the form.

Related Information

Configuring Required Fields in XML Template [page 151]
Field Permissions [page 82]

5.6 Configuring Custom Fields

Configure custom fields in a goal section, competency section, and custom section according to your business needs.

Context

You can configure the following custom field types:

- Label: A label in bold text
- Text: One-line text box
- Text area: Multiline text box that Legal Scan and Spell Check can be applied
- Date: A data type
- List: A dropdown list
- Integer: A data type
- Double: A data type
- Checkbox: A checkbox item

Custom fields are rendered vertically as stacked fields; they can't be shown side by side on the same line. In a custom section, custom fields appear only once in the entire section. In a goal or competency section, custom fields appear above the rating field of each goal or competency in the section.

Procedure

1. In Admin Center, go to *Manage Templates* and open a form template.
2. Choose *Edit Fields and Sections* and select a section in which you want to configure custom fields.
3. Choose *Show advanced options* and *0 Custom Element(s) defined. Click to modify*.

   The *Custom Elements* dialog box appears.
4. Choose *Add Another* and select a type of a custom field.

   Depending on the selected type, you need different configurations. Refer to the following table for more information.

Type	Attribute	Description
Label	Name	Enter the name of the label.
Text	Minimum Value	Enter the minimum number of charac-ters allowed for the field.

Type	Attribute	Description
	Maximum Value	Enter the maximum number of characters allowed for the field.
	Editable during mass creation of forms	Select this option to allow editing the field during mass creation of forms.
	Name	Enter the name of the field.
	Value	Enter the default value of the field.
Text area	Minimum Value	Enter the minimum number of characters allowed for the field.
	Maximum Value	Enter the maximum number of characters allowed for the field.
	Writing Assistant	Select this option to enable Writing Assistant in the field. **Note** Writing Assistant only works for the field in a competency section. It is not available in a custom section.
	Mime Type	Not Applicable **Note** The text format on forms is centrally determined by form template settings. To use Rich Text Editor, make sure that *Use Plain Text Only for Comments* shouldn't be selected in *Form Template Settings*. HTML is not supported in custom fields.
	Editable during mass creation of forms	Select this option to allow editing the field during mass creation of forms.
	Name	Enter the name of the field.
	Value	Enter the default value of the field.
Date	Name	Enter the name of the field.
	Value	Enter the default value of the field.

Type	Attribute	Description
List	Name	Enter the name of the field.
	Custom Element's list's value type	Select a value type for list options: • Integer • Text • Date • Double
	Custom Element's list's default name	Select the radio button to define the default list option. → Recommendation If you grant different access permissions to roles for the list field, we recommend that you do not define the default list option. Leave the *Custom Element's list's default name* field blank and choose *Add Element to List* to define list options.
	Custom Element's list's default name	Enter the name of the default list option.
	Custom Element's list's default value	Not Applicable
	List Element's name	Enter the name of the list option.
	List Element's name	Not Applicable
Integer Double	Minimum Value	Enter the minimum number allowed for the field.
	Maximum Value	Enter the maximum number allowed for the field.
	Name	Enter the name of the field.
	Value	Enter the default value of the field.
Checkbox	Editable during mass creation of forms	Select the option to allow enabling or disabling the checkbox during mass creation of forms.
	Name	Enter the name of the checkbox.

Type	Attribute	Description
	Custom Element's title	Select the option to set the checkbox to be selected by default.

> **i Note**
>
> Custom field names are in bold by default.

5. Choose *Done* in the dialog box and choose *Save* on the page.

5.7 Localizing Labels

Localize labels in the form template so that labels on forms can be shown in logged-in user's language.

Prerequisites

To localize labels in a language that uses characters not included in the Basic Latin character set, such as Bulgarian and Romanian, make sure that *Always use TTF Embedding for PDF* is enabled in Provisioning. Otherwise, these languages may not be correctly rendered in PDF output.

> **→ 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. In Admin Center, go to *Manage Templates* and open a form template.
2. Locate the label that you want to localize and choose *Add More*.

   The *Localize PM Template Label* dialog box opens.
3. Follow the steps of one of the following two options.

   - **To localize labels from scratch**

   a. In *Localize PM Template Label*, choose *Add Language*.
   b. Select a language and enter a text.
   c. Choose *Done* in the dialog box and choose *Save* on the page.

      A message key associated with your label and language configuration is generated.

   - **To use an existing message key**

a. In *Localize PM Template Label*, choose *Done*, and save the template.
b. Go back to the label and choose *Add More*.
c. Enter the existing message key in *Element Key* and choose *Check*.

   The label and language configuration associated with the message key appears.
d. Choose *Use this message configuration, refresh*.
e. Choose *Done* in the dialog box and choose *Save* on the page.

   The label is updated with the existing language configuration.

5.7.1 Editing a Message Key

A message key is a random number generated in the system when you localize labels in the form template. When you edit an existing message key, a new one is created and used.

Context

When a form template is saved as another template, the existing message keys generated in the original template are copied to the new template. We recommend that you edit those message keys in the new template, so to distinguish them between different templates. Therefore, when you update label and language configuration in one template, other templates are not affected.

Procedure

1. In Admin Center, go to *Manage Templates* and open a form template.
2. Locate the label of which you want to edit the message key and choose *Add More*.

   The *Localize PM Template Label* dialog box opens.
3. Edit the message key in *Element Key* and choose *Check*.
4. Choose *Please click here to use this key* to confirm that you want to apply the new message key.
5. Choose *Done* in the dialog box and choose *Save* on the page.

5.7.2 Managing Form Label Translations

In *Manage Form Label Translations*, you can update form label translations, and view the count and name of form templates where message keys are used.

Context

> **Note**
>
> You can't update label translations for the forms that have already been launched.

Procedure

1. In Admin Center, go to *Manage Form Label Translations*.
2. Choose any of the following options based on your needs:

Option	Description
Export Form Label Translations	You can export all label translations or the label translations associated with a particular template.
Import Form Label Translation File	You can upload a CSV file based on the form label translation template to update the label translations. **Caution** The columns of languages that you don't use should be deleted. Make sure that *Unicode (UTF-8)* is selected in *File Encoding*. If you import a new message key, you also need to add the message key to the XML template. **Sample Code** `<obj-sect-name msgKey="PM_GoalSection_name"><![CDATA[Goals]]></obj-sect-name>`
Form Label Translation Matrix	You can use *Label Key* or *Form Template Name* to search for message keys and view the count and name of templates where these keys are used.

6 Configuring Form Templates Using XML

When configuring form templates, you define form settings, for example, form title and description, associated route map and rating scale, fields and sections, and form permissions. You can use an XML file to configure a form template and upload it to Admin Center, or edit an existing form template 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.

[Rating Scales (fm-sect-scale) [page 154]]
Use this element to associate a rating scale with a goal section, competency section or summary section.

[Custom Fields (fm-element) [page 159]]
You can find the DTD definition, attributes, and elements applicable to custom fields.

[Form Permissions in XML Template [page 164]]
Learn about the form permissions for buttons, tabs, sections, actions, and fields in an XML form template.

6.1 Uploading a Form Template

Upload a new XML form template so that you can configure the template for performance reviews.

Procedure

1. In *Admin Center*, go to *Form Template Settings*.

   The *Managing Form Templates* page opens.
2. Choose *Upload New Form*.
3. On the *Managing Form Templates* page, enter a name for your template, and browse for the form template XML file.
4. Choose *Upload Form Template*.

   A form template is uploaded.

Next Steps

Edit the sections and fields of the template or upload an updated template in Provisioning.

6.1.1 DTD for Form Templates

The Document Type Definition (DTD) file for Performance Management (`sf-form.dtd`) defines the structure and all elements and attributes of the XML form template.

The most basic components of the DTD file for form templates are listed as follows.

```
<!ELEMENT sf-pmreview (userinfo-sect?, reviewinfo-sect?, introduction-sect?,
objective-sect*, competency-sect*,
custom-sect?, summary-sect?, signature-sect?, job-desc-sect?, objcomp-summary-
sect?, compensation-sect?)>
```

Each element can contain other elements. Elements contained within an element are referred to as subelements. The following symbols are used in the DTD file to indicate the number of subelements you can have within a given element.

+	The subelement must appear at least once.
*	The subelement can appear 0 or more times.
?	The subelement can appear either 0 time or 1 time only.
No symbol	The subelement must appear once and only once.

Elements can have attributes. The attributes are a list of options that affect the behavior of the element.

To download the latest DTD file, go to Partner Portal. Go to *Products* > *Human Capital Management* > *SAP SuccessFactors HXM Suite* > *Implement*, and under *Top Assets*, choose *Access SAP SuccessFactors DTD configuration files*.

6.1.2 XML Example: Form Template

This is an XML form template. It consists of an introduction section, a goal section, a competency section, a summary section, and a signature section.

```
<sf-form version-number="2" locale="en_US">
  <fm-meta>
    <meta-form-id>-1</meta-form-id>
    <meta-rated>true</meta-rated>
    <meta-rating>0.0</meta-rating>
    <meta-scale>0.0</meta-scale>
    <meta-grp-label><![CDATA[Group]]></meta-grp-label>
    <fm-sect-scale show-value="true">
      <scale-source>1</scale-source>
      <scale-id><![CDATA[2005b]]></scale-id>
      <scale-type><![CDATA[null]]></scale-type>
    </fm-sect-scale>
    <meta-item-weight-floor-ceiling-option>warning</meta-item-weight-floor-ceiling-
option>
    <my-team-rater/>
  </fm-meta>
  <sf-pmreview show-weight="true" weight-lockdown="false" rate-by-adding-
values="false" overall-rating="true" no-calc="false">
    <introduction-sect>
      <fm-sect cmt-opt="1" split-cmt="false" mgt-only="false" index="0">
        <fm-sect-name><![CDATA[Introduction]]></fm-sect-name>
        <fm-sect-intro><![CDATA[Welcome to this year's performance appraisal
process. This process is designed to help you and your manager identify your
accomplishments and goal achievement during the year. At the end of this process,
you and your manager will also have the ability to begin the process of identifying
next year's goals and career development opportunities. If you have any questions
or concerns relating to this year's appraisal cycle, you can contact your manager,
your divisional HR representative or consult the Human Resources website.]]></fm-
sect-intro>
        <fm-sect-config>
          <rating-label><![CDATA[Rating]]></rating-label>
      <rating-label-others><![CDATA[Rating]]></rating-label-others>
      <default-rating><![CDATA[unrated]]></default-rating>
      <unrated-rating><![CDATA[Too New To Rate]]></unrated-rating>
      <hidden-strength-threshold>0.0</hidden-strength-threshold><blind-spot-
threshold>0.0</blind-spot-threshold>
      <num-decimal-places>2</num-decimal-places>
      <publish-button-label><![CDATA[Publish Content]]></publish-button-label>
```

```
        </fm-sect-config>
      </fm-sect>
    </introduction-sect>
    <objective-sect cmt-opt="3" split-cmt="true" mgt-only="false"
index="1" show-calculated-section-rating="true" obj-edit="popup" ez-rater-expand-
all="false" sect-mode="normal" hide-addexistinggoals-btn="false" allow-draft-tgm-
goals="false" max-goals-allowed="2147483647" min-goals-required="-2147483648"
auto-pop-weights="false" in-objcomp-summ-overall-rating="false" in-objcomp-summ-
display="false" lock-item-weights="false" if-no-ratings-then-ignore-section="false"
use-milestone="false" no-group="false" in-overall-rating="false" in-summ-
display="true" rating-opt="3" summ-opt="0" no-weight="true" show-learning-activity-
competency="false" develop-goal="false" no-rate="true" use-jobcode="false"
configurable="true">
      <obj-sect-name><![CDATA[Objectives]]></obj-sect-name>
      <obj-sect-intro><![CDATA[Comment on and rate the individual's demonstration
of each of the objectives listed below.]]></obj-sect-intro>
      <fm-sect-config>
        <rating-label><![CDATA[Rating]]></rating-label>
        <rating-label-others><![CDATA[Rating]]></rating-label-others>
        <default-rating><![CDATA[unrated]]></default-rating>
        <unrated-rating><![CDATA[Too New To Rate]]></unrated-rating>
        <hidden-strength-threshold>0.0</hidden-strength-threshold>
        <blind-spot-threshold>0.0</blind-spot-threshold>
        <num-decimal-places>2</num-decimal-places>
        <publish-button-label><![CDATA[Publish Content]]></publish-button-label>
      </fm-sect-config>
      <sect-weight>50.0</sect-weight>
      <fm-sect-scale show-value="true">
        <scale-source>1</scale-source>
        <scale-id><![CDATA[2005b]]></scale-id>
        <scale-type><![CDATA[null]]></scale-type>
      </fm-sect-scale>
      <obj-sect-type autosync="true"><![CDATA[plan]]></obj-sect-type>
      <obj-sect-plan-id>3</obj-sect-plan-id>
      <meta-grp-label><![CDATA[Group]]></meta-grp-label>
    </objective-sect>
    <competency-sect cmt-opt="2" split-cmt="true" mgt-only="false" index="2" show-
calculated-section-rating="true" ez-rater-expand-all="false" sect-mode="normal"
in-objcomp-summ-overall-rating="false" in-objcomp-summ-display="false" lock-item-
weights="false" if-no-ratings-then-ignore-section="false" no-group="false" in-
overall-rating="true" in-summ-display="true" rating-opt="3" summ-opt="0"
no-weight="false" no-rate="false" use-jobcode="true" configurable="true"
hide-waca="false" lock-behavior-content="false" behavior-weighted="false"
behavior-expected-rating-format="0" show-behavior-expected-rating="false" comp-
expected-rating-format="0" show-comp-proficiency-level="false" show-comp-expected-
rating="false" use-behavior="false" behavior-mode-opt="0" behavior-cmt-opt="1"
behavior-rating-opt="1" suppress-item-comments="0" category-filter-opt="no-filter"
use-core-comp="false">
      <comp-sect-name><![CDATA[Competencies]]></comp-sect-name>
      <comp-sect-intro><![CDATA[Describe the individual's demonstration of each of
the competencies listed below. You can use the "Writing Assistant" to review
sample descriptions of behaviors and performance levels to help you describe the
employee's performance.]]></comp-sect-intro>
      <fm-sect-config>
        <rating-label><![CDATA[Rating]]></rating-label>
        <rating-label-others><![CDATA[Rating]]></rating-label-others>
        <default-rating><![CDATA[unrated]]></default-rating>
        <unrated-rating><![CDATA[Too New To Rate]]></unrated-rating>
        <weight-total><![CDATA[100.0]]></weight-total>
        <hidden-strength-threshold>0.0</hidden-strength-threshold>
        <blind-spot-threshold>0.0</blind-spot-threshold>
        <num-decimal-places>2</num-decimal-places>
        <publish-button-label><![CDATA[Publish Content]]></publish-button-label>
      </fm-sect-config>
      <sect-weight>50.0</sect-weight>
      <fm-sect-scale show-value="true">
        <scale-source>1</scale-source>
        <scale-id><![CDATA[2005b]]></scale-id>
```

```
        <scale-type><![CDATA[null]]></scale-type>
      </fm-sect-scale>
      <meta-grp-label><![CDATA[Group]]></meta-grp-label>
    </competency-sect>
    <summary-sect cmt-opt="0" split-cmt="false" mgt-only="false" index="4" rating-
opt="3" overall-rating-display-order="manual-calc" show-group-matrix="true" use-
adjusted-scale-for-section-header-rating="0" rating-mode="text" show-listing="true"
override-unrated="false" manual-rating="true">
      <summary-sect-name><![CDATA[Overall Performance Summary and Additional
Comments]]></summary-sect-name>
      <summary-sect-intro><![CDATA[Use this section to summarize the employee's
overall performance during the review period.]]></summary-sect-intro>
      <fm-sect-config>
        <rating-label><![CDATA[Rating]]></rating-label>
        <rating-label-others><![CDATA[Rating]]></rating-label-others>
        <default-rating><![CDATA[unrated]]></default-rating>
        <unrated-rating><![CDATA[Too New to Rate]]></unrated-rating>
        <weight-total><![CDATA[100.0]]></weight-total>
        <hidden-strength-threshold>0.0</hidden-strength-threshold>
        <blind-spot-threshold>0.0</blind-spot-threshold>
        <item-weights>
          <item-weight-floor>10.0</item-weight-floor>
          <item-weight-ceiling>100.0</item-weight-ceiling>
        </item-weights>
        <num-decimal-places>2</num-decimal-places>
        <publish-button-label><![CDATA[Publish Content]]></publish-button-label>
      </fm-sect-config>
    </summary-sect>
    <signature-sect>
      <fm-sect cmt-opt="1" split-cmt="false" mgt-only="false" index="3">
        <fm-sect-name><![CDATA[Signature Section]]></fm-sect-name>
        <fm-sect-intro><![CDATA[Use this section to sign the document.]]></fm-sect-
intro>
        <fm-sect-config>
          <rating-label><![CDATA[Rating]]></rating-label>
      <rating-label-others><![CDATA[Rating]]></rating-label-others>
      <default-rating><![CDATA[unrated]]></default-rating>
      <unrated-rating><![CDATA[Too New To Rate]]></unrated-rating>
      <hidden-strength-threshold>0.0</hidden-strength-threshold>
      <blind-spot-threshold>0.0</blind-spot-threshold>
      <num-decimal-places>2</num-decimal-places>
          <publish-button-label><![CDATA[Publish Content]]></publish-button-label>
        </fm-sect-config>
      </fm-sect>
    </signature-sect>
  </sf-pmreview>
</sf-form>
```

6.2 Editing a Form Template

After you upload a form template, you can edit the template in Provisioning.

Prerequisites

You have access to 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.

Context

You can also edit the template by downloading it from *Admin Center* > *Form Template Settings*, editing it using an XML editor, and uploading it to Provisioning.

Procedure

1. In Provisioning, select a company.
2. Choose *Form Template Administration*.
3. Select the form template you want to edit.

   IDs of templates are numbered by the order they are uploaded. The *Form* type indicates it's a Performance Management template.
4. You can choose either of the following ways to edit the form template:
   - Choose *Update by upload* to upload the updated template.
   - Make form-level or section-level changes on the page.

If you want to:	Do this:
Add a new section	In the *Add New Section* area, 1. Enter a name for the section. 2. Choose a section type. 3. Choose *Add*.
Reorder or delete existing sections	In the *Arrange Sections* area, reorder the sections by selecting a section and choosing *Move Here*, or delete unnecessary sections.
Configure template settings	In the *Edit Form Attributes* area, make changes and *Save Form*.
Edit sections and fields	In the *Edit Sections* area, make changes and *Save Form*.

6.3 Meta Section (fm-meta)

The meta section of a Performance Management form is not a section that can be shown on the form. Instead, you can configure elements under `<fm-meta>` for form-level features, for example, rating scale, scale adjusted calculation, and attachments.

For more information on all available elements, refer to the DTD file.

Configuring Permissions for Attachments [page 101]
Users can manage attachments in the Supporting Information pod on Performance Management forms. You can configure permissions for attachments according to customer's business needs.

Configuring Permissions to Mass Route Forms [page 103]
Users with certain role-based permissions can mass route forms in the form inbox. You can further configure permissions in an XML form template, for example, to allow users to mass route forms only in a specific step.

Configuring Character Limits for Text Area Fields [page 104]
You can configure character limits and a character limit bar for section comments, item comments, and custom text area fields to alert users when the configured character limits are reached.

6.3.1 Configuring Permissions for Attachments

Users can manage attachments in the Supporting Information pod on Performance Management forms. You can configure permissions for attachments according to customer's business needs.

Prerequisites

Enable attachments is selected in *Form Template Settings*.

Procedure

1. In an XML form template, add the `<attachment-permission>` element under `<fm-meta>`.
2. Specify the permission type and action.

Attribute or Subelement	Description
`type`	• `none`: Attachments are not shown to users. • `enabled`: Used to enable the read or edit action, or both.

Attribute or Subelement	Description
`<attach-action>`	• `read`: Users can view all attachments, but can only add and edit their own attachments. • `edit`: In addition to the read action, users can edit and delete all attachments.

In this example, employees have the edit permission and managers have the read permission to attachments, while all other users can't view attachments.

Sample Code

```
<fm-meta>
  <meta-form-id>-1</meta-form-id>
  <meta-rated>true</meta-rated>
  <meta-rating>0.0</meta-rating>
  <meta-scale>0.0</meta-scale>
  <meta-grp-label><![CDATA[Group]]></meta-grp-label>
  <fm-sect-scale show-value="true">
    <scale-source>1</scale-source>
    <scale-id><![CDATA[2005b]]></scale-id>
    <scale-type><![CDATA[null]]></scale-type>
  </fm-sect-scale>
  <meta-item-weight-floor-ceiling-option>warning</meta-item-weight-floor-
ceiling-option>
  <attachment-permission type="none">
    <role-name>*</role-name>
    <attach-action refid="read"/>
    <attach-action refid="edit"/>
  </attachment-permission>
  <attachment-permission type="enabled">
    <role-name>E</role-name>
    <attach-action refid="edit"/>
  </attachment-permission>
  <attachment-permission type="enabled">
    <role-name>EM</role-name>
    <attach-action refid="read"/>
  </attachment-permission>
</fm-meta>
```

Related Information

Supporting Information Pod [page 182]

6.3.2 Configuring Permissions to Mass Route Forms

Users with certain role-based permissions can mass route forms in the form inbox. You can further configure permissions in an XML form template, for example, to allow users to mass route forms only in a specific step.

Prerequisites

Users are granted with the permissions of *Mass Route Document Forward* and *Mass Route Document Backward* under *Manage Documents* in *Manage Permission Roles*.

Procedure

1. In an XML form template, add the `<mass-route-permission>` element under `<fm-meta>`.
2. Specify the permission type, validation setting, role name, and route step accordingly.

Attribute or Subelement	Description
`type`	`none` or `enabled`
`validation`	`true` or `false` → Recommendation We recommend that you set this attribute to `true` so that forms should pass validation before being routed to avoid data issues for other modules.
`<role-name>`	Role value. Example: E, EM
`<route-step>`	Step ID

In this example, only managers can mass route forms in a collaboration step and the forms should pass validation before being routed.

Sample Code

```
<fm-meta>
  <meta-form-id>-1</meta-form-id>
  <meta-rated>true</meta-rated>
  <meta-rating>0.0</meta-rating>
  <meta-scale>0.0</meta-scale>
  <meta-grp-label><![CDATA[Group]]></meta-grp-label>
  <fm-sect-scale show-value="true">
    <scale-source>1</scale-source>
    <scale-id><![CDATA[2005b]]></scale-id>
    <scale-type><![CDATA[null]]></scale-type>
  </fm-sect-scale>
  <meta-item-weight-floor-ceiling-option>warning</meta-item-weight-floor-
ceiling-option>
```

```
  <mass-route-permission type="none" validation="false">
    <role-name>*</role-name>
    <route-step stepid="*"/>
  </mass-route-permission>
  <mass-route-permission type="enabled" validation="true">
    <role-name>EM</role-name>
    <route-step stepid="CStep"/>
  </mass-route-permission>
</fm-meta>
```

6.3.3 Configuring Character Limits for Text Area Fields

You can configure character limits and a character limit bar for section comments, item comments, and custom text area fields to alert users when the configured character limits are reached.

Context

The default maximum limit is 4,000 characters. If users enter more than that, a warning message is displayed and the excess characters are truncated. You can also customize the limit by section.

Additionally, when 75% of the default or customized limit is used in comment fields, a character limit bar is displayed on the bottom-right of the fields. By hovering the mouse over the bar, users can view the number of characters allowed before the limit is reached.

The configuration can be applied to goal section, competency section, summary section, goal competency summary section, performance potential summary section, signature section, and custom section.

> **Note**
>
> When Stack Ranker is enabled, section comments and item comments in the competency section allow a maximum of 4,000 characters. A warning message is displayed when users exceed the limit.
>
> Table reports only support 4,000 characters at maximum for text area fields. If a text area field is configured to have more than 4,000 characters, only the first 4,000 characters are shown on a report.

Procedure

1. In an XML form template, add the `<meta-enforce-rte-limit>` and `<meta-enforce-plain-text-length-limit>` elements under `<fm-meta>` and set the value to `true`.

   This is the configuration for the default 4,000-character limit.

   Sample Code

   ```
   <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-enforce-rte-limit>true</meta-enforce-rte-limit>
  <meta-enforce-plain-text-length-limit>true</meta-enforce-plain-text-length-limit>
  <meta-grp-label><![CDATA[Group]]></meta-grp-label>
  <fm-sect-scale show-value="true">
    <scale-source>1</scale-source>
    <scale-id><![CDATA[2005b]]></scale-id>
    <scale-type><![CDATA[null]]></scale-type>
  </fm-sect-scale>
</fm-meta>
```

2. To customize the character limit by section, set the `cmt-max-limit` attribute to a number greater than `-1` in a specific section.

Next Steps

You can also configure the character limits by the minimum value and maximum value of required fields. If the maximum value of required fields is less than 4,000, this value will prevail the `cmt-max-limit` configuration.

Related Information

Configuring Required Fields [page 86]
Configuring Required Fields in XML Template [page 151]

6.4 Goal Section (obj-sect)

You can find the DTD definition, attributes, and elements applicable to this section. This topic lists only the attributes and elements that are commonly used. For more information, refer to the latest DTD file.

DTD Definition

```
<!ELEMENT objective-sect (obj-sect-name?, obj-sect-intro?, fm-sect-config?, action-permission*, field-permission*, official-rating-permission*, others-ratingtab-item-permission*, tab-permission*, emos-min-score?, sect-weight?, sect-weight-4-objcomp-summary?, fm-sect-scale?, obj-sect-type?, obj-sect-plan-id?, obj-sect-filter?, obj-sect-filter-val?, obj-category*, obj-type*, sect-fm-elements?, sect-level-elements?, fm-objective*, fm-comment*, meta-grp-label?, meta-grp*, obj-plan-state-change*)>
```

```
<!ATTLIST objective-sect
    index CDATA #REQUIRED
```

```
    configurable (true | false) "false"
    mgt-only (true | false) "false"
    sum-comment-only (true | false) "false"
    ask-4-comment (true | false) "false"
    use-jobcode (true | false) "false"
    no-rate (true | false) "false"
    no-weight (true | false) "false"
    summ-opt CDATA "0"
    split-cmt (true | false) "false"
    rating-opt CDATA "0"
    cmt-opt (0 | 1 | 2 | 3) "0"
    cmt-max-limit CDATA "-1"
    suppress-item-comments (0 | 3) "0"
    suppress-item-comments-label (true | false) "false"
    line-break-in-section-comments (true | false) "false"
    in-summ-display (true | false | bk) "bk"
    in-overall-rating (true | false | bk) "bk"
    no-group (true | false) "true"
    use-milestone (true | false) "false"
    if-no-ratings-then-ignore-section (true | false) "true"
    lock-item-weights (true | false) "false"
    in-objcomp-summ-display (true | false) "false"
    in-objcomp-summ-overall-rating (true | false) "false"
    auto-pop-weights (true | false) "false"
    develop-goal (true | false) "false"
    show-learning-activity-competency (true | false) "false"
    learning-activity-section-title CDATA #IMPLIED
    min-goals-required CDATA #IMPLIED
    max-goals-allowed CDATA #IMPLIED
    allow-draft-tgm-goals (true | false) "false"
    hide-addexistinggoals-btn (true | false) "false"
    sect-mode (normal | EZ-Rater) "normal"
    ez-rater-expand-all (true | false) "false"
    obj-edit (form | popup) "form"
    show-calculated-section-rating (true | false) "true"
    pdf-page-break-opt (0 | 1 | 2) #IMPLIED
    avoid-obj-plan-state-change-by-multiple-forms (true | false) "false"
    use-mlt-rating-if-present (true | false) #IMPLIED
    exclude-private-goals (true | false) #IMPLIED
>
```

Attributes

Attribute	Description
index	A number that represents the display order of the section on the form, for example, 0, 1, 2, 3. When you move a section in Provisioning, the index number assigned to the section will be updated automatically to reflect how you have rearranged the sections on the form.
configurable	Set to `true` if you want to allow users to add and remove items within the section.
no-rate	Set to `false` if you want rating scale for items to appear within the section.

Attribute	Description
develop-goal	Set to `false` if you are configuring this section for performance goals.
show-learning-activity-competency	Set to `false` if you want learning activities for compentencies to appear within the section.
split-cmt	Set to `true` if you want subject's and manager's comments to show side by side. **Note** In Performance Management, the attribute is always set to `true`.
rating-opt	Option values are `0` (default), `1`, `2`, and `3`. See Rating Options for more information.
cmt-opt	Four comment options are available. • `0` (default): Shows both item and section comments. • `1`: Shows only section comments, no item comments. • `2`: Shows only item comments, no section comments. • `3`: Shows no item or section comment.
in-summ-display	Set to `true` if you want the section to show in the summary section.
in-overall-rating	Set to `true` if the section is used in the calculated form rating. If `in-summ-display` and `in-overall-rating` are set to `false`, users receive `Final score is not available` in the Overall Score pod on forms.
if-no-ratings-then-ignore-section	If the section has no ratings, it is excluded from the calculated form rating. To use 0 for the section in the calculated form rating, set the attribute to `false`.
lock-item-weights	Set to `true` if you don't want the weight of goals to be edited.
in-objcomp-summ-display	Set to `true` if you want the section to show in the goal competency summary section.
in-objcomp-summ-overall-rating	Set to `true` if you want to include the section in the overall goal rating in the goal competency summary section.

Attribute	Description
no-weight	Use this attribute to configure weights of goal sections. • Set this value to `true` if you want all the goals in one goal section to be equally weighted. • Set this value to `false` if you want to specify goal weights or to import the goal weights from a goal plan. Thus the goal weights are shown in the section and the section's average rating is used in the calculated form rating. When you set the attribute to `true`, table reports will no longer generate a report on the section weight of the section. Once you set it back to `false`, the reports can pull the section weight again.
auto-pop-weights	Set to `true` if you want to auto-populate the goal weights from the goal plan. The `no-weight` attribute must be set to `false` at the same time.
min-goals-required	The minimum number of goals that must be in this section to allow the form to be routed
max-goals-allowed	The maximum number of goals allowed in this section, exceeding which the form will not be routed
hide-addexistinggoals-btn	Set to `true` if you don't allow auto-populating goals from the goal plan.
sect-mode	Set to `EZ-Rater` if customers want to use the EZ Rater feature. See EZ Rater for more information.
ez-rater-expand-all	If the section is in the EZ Rater mode, to expand all competency details, set the attribute to `true`. See EZ Rater for more information.
obj-edit	Set to `popup` if you want users to edit goals in a popped-up window.
show-calculated-section-rating	Set to `true` if you want to show the calculated section rating.
use-mlt-rating-if-present	Set to `true` if you want the metric lookup table and ratings from the goal plan to be considered for rating calculation.
exclude-private-goals	Set to `true` if you want to exclude private goals from the form. Thus users cannot add a new private goal to the form. **i Note** This option only works when you launch a form. If you change public goals on the form to private goals after launching the form, the goals still appear on the form.

Elements

Element	Description
obj-sect-name	The name of the section
obj-sect-intro	The introduction of the section
fm-sect-config	See Additional Form Section Configuration (fm-sect-config) for more information.
tab-permission type	See Form Permissions in XML Template for more information.
sect-weight	The weight of the section for the calculated form rating in the summary section
sect-weight-4-objcomp-summary	The weight of the section for the overall goal rating in the goal competency summary section
fm-sect-scale	See Rating Scales (fm-sect-scale) for more information.
obj-sect-type	The `obj-sect-type` element indicates how to populate the goal section: • Set to `custom` if you don't want to auto-populate goals to a form when the form is created. • Set to `plan` if you want to auto-populate goals to a form when the form is created.
meta-grp-label	Label for form's available rating distribution groups
obj-plan-state-change	Configure this element to allow changing the goal plan state when the form is routed. See Changing the Goal Plan State on Form Routing for more information.

Related Information

Rating Options [page 51]
EZ Rater [page 209]
Additional Form Section Configuration (fm-sect-config) [page 149]
Rating Scales (fm-sect-scale) [page 154]
Changing the Goal Plan State on Form Routing
Form Permissions in XML Template [page 164]

6.4.1 Including Goals from Goal Plan into Goal Section

You can auto-populate goals from a goal plan into a goal section, and auto-synchronize goals between the goal plan and the Performance Management form.

Prerequisites

Considering the fields and layout defined in a goal plan template will appear on the form, make sure that you've set the type of the name field as text in the goal plan template. If you've set it as `enum`, set both `enum-value` and `enum-label` as text. This ensures that the text is correctly displayed in the goal section, just as it is in the goal plan.

Procedure

1. In an XML form template, add the `<obj-sect-type>` and `<obj-sect-plan-id>` elements.

   > **Note**
   >
   > - For the location where the elements should be added, refer to the DTD Definition section in Goal Section (obj-sect).
   > - Specify the goal plan ID in the `<obj-sect-plan-id>` element.

   > **Sample Code**
   >
   > ```
   > <obj-sect-type><![CDATA[plan]]></obj-sect-type>
   > <obj-sect-plan-id>3</obj-sect-plan-id>
   > ```

2. To auto-synchronize goals between a goal plan and a form, set the `autosync` attribute to `true` in the `<obj-sect-type>` element.

   > **Note**
   >
   > The `autosync` attribute only applies when a goal plan is referenced in the `<obj-sect-type>` element.

   > **Note**
   >
   > If you use the latest Goal Management and you enabled the auto-sync feature in Performance Management, please be aware of the following:
   >
   > - Users can delete a goal on a Performance Management form only when they have the *User Permissions* > *Objectives* > *Objective Plan Permissions* role-based permission to the goal plan of that goal. The goal deleted from the form will also be deleted from the goal plan.
   > - Users without the permission can't see the button to delete the goal on the form.

Sample Code

```
<obj-sect-type autosync="true"><![CDATA[plan]]></obj-sect-type>
<obj-sect-plan-id>3</obj-sect-plan-id>
```

3. To populate goals of certain categories, add the `<obj-category>` element and specify the category ID.

i Note

Category ID is the internal id that was assigned to a goal category in a goal plan template. See Defining Category and Default-Category for more information.

Sample Code

```
<obj-sect-type><![CDATA[plan]]></obj-sect-type>
<obj-sect-plan-id>3</obj-sect-plan-id>
<obj-category><![CDATA[Customer]]></obj-category>
<obj-category><![CDATA[Financial]]></obj-category>
```

4. To populate only user goals, add the `<obj-type>` element.

i Note

Using <obj-type><![CDATA[group]]></obj-type> to auto-populate only group goals is not supported currently.

Sample Code

```
<obj-sect-type><![CDATA[plan]]></obj-sect-type>
<obj-sect-plan-id>3</obj-sect-plan-id>
<obj-type><![CDATA[user]]></obj-type>
```

Related Information

Auto-Populate and Auto-Sync [page 58]
Defining Category and Default-Category

6.4.2 Setting Ceiling and Floor Weights

You can set the ceiling and floor for weights so that users can't add a goal weight out of the specified range.

Context

If you specify a weight ceiling and floor, by default a warning is displayed to users when a weight is out of the range. This warning doesn't prevent users from routing the form to another user. If you want to force the user to correct the out-of-range weight before routing the form, configure the warning as an error instead.

Procedure

1. In an XML form template, add `<meta-item-weight-floor-ceiling-option>` to the meta section.

   Sample Code

   ```
   <fm-meta>
    <meta-form-id>-1</meta-form-id>
    <meta-rated>true</meta-rated>
    <meta-rating>0.0</meta-rating>
    <meta-scale>0.0</meta-scale>
    <meta-grp-label><![CDATA[Balance Scorecard]]></meta-grp-label>
    <meta-grp><![CDATA[Customer]]></meta-grp>
    <meta-grp><![CDATA[Financial]]></meta-grp>
    <meta-grp><![CDATA[Learning]]></meta-grp>
    <meta-grp><![CDATA[Operations]]></meta-grp>
    <fm-sect-scale show-value="true">
      <scale-id><![CDATA[Default Scale]]></scale-id>
      <scale-type><![CDATA[null]]></scale-type>
    </fm-sect-scale>
    <meta-item-weight-floor-ceiling-option>warning</meta-item-weight-floor-
   ceiling-option>
   </fm-meta>
   ```

   Note

   Replace `warning` with `error` if you want to prevent users from saving or forwarding the form when a weight falls beyond the range.

2. Add the `<item-weights>` element to set the weight ceiling and floor.

   Sample Code

   ```
   <objective-sect cmt-opt="3" split-cmt="true" mgt-only="false"
   index="1" show-calculated-section-rating="true" obj-edit="popup" ez-rater-
   expand-all="false" sect-mode="normal" hide-addexistinggoals-btn="false"
   allow-draft-tgm-goals="false" max-goals-allowed="2147483647" min-goals-
   required="-2147483648" auto-pop-weights="false" in-objcomp-summ-overall-
   rating="false" in-objcomp-summ-display="false" lock-item-weights="false" if-
   no-ratings-then-ignore-section="false" use-milestone="false" no-group="false"
   in-overall-rating="false" in-summ-display="true" rating-opt="3" summ-
   ```

```
opt="0" no-weight="true" show-learning-activity-competency="false" develop-
goal="false" no-rate="true" use-jobcode="false" configurable="true">
    <obj-sect-name><![CDATA[Objectives]]></obj-sect-name>
    <obj-sect-intro><![CDATA[Comment on and rate the individual's
demonstration of each of the objectives listed below.]]></obj-sect-intro>
    <fm-sect-config>
      <rating-label><![CDATA[Manager Rating]]></rating-label>
      <rating-label-others><![CDATA[Member Rating]]></rating-label-
others>
      <default-rating><![CDATA[unrated]]></default-rating>
      <weight-total><![CDATA[100.0]]></weight-total>
      <hidden-strength-threshold>0.0</hidden-strength-threshold>
      <blind-spot-threshold>0.0</blind-spot-threshold>
      <item-weights>
        <item-weight-floor>5.0</item-weight-floor>
        <item-weight-ceiling>100.0</item-weight-ceiling>
      </item-weights>
      <weight-total-option><![CDATA[enforce]]></weight-total-option>
      <num-decimal-places>2</num-decimal-places>
      <publish-button-label><![CDATA[Publish Content]]></publish-button-label>
   </fm-sect-config>
   <sect-weight>50.0</sect-weight>
   <fm-sect-scale show-value="false">
      <scale-source>1</scale-source>
      <scale-id><![CDATA[Default Scale]]></scale-id>
      <scale-type><![CDATA[null]]></scale-type>
   </fm-sect-scale>
   <obj-sect-type><![CDATA[plan]]></obj-sect-type>
   <obj-sect-plan-id>2</obj-sect-plan-id>
   <meta-grp-label><![CDATA[Group]]></meta-grp-label>
</objective-sect>
```

6.5 Competency Section (competency-sect)

You can find the DTD definition, attributes, and elements applicable to this section. This topic lists only the attributes and elements that are commonly used. For more information, refer to the latest DTD file.

DTD Definition

```
<!ELEMENT competency-sect (comp-sect-name, comp-sect-intro?, fm-sect-config?,
action-permission*, field-permission*, behavior-rating-calc?, competency-rating-
calc?,
sect-weight?, sect-weight-4-objcomp-summary?, fm-sect-scale?, fm-subitem-scale?,
comp-category*, sect-fm-elements?, sect-level-elements?, fm-competency*, fm-
comment*,
meta-grp-label?, meta-grp*, content-filters?, fm-rating-info-config?,
fm-comp-filter-mapping?)>
```

```
<!ATTLIST competency-sect
index="7"
configurable="true"
mgt-only="false"
use-jobcode="false"
use-core-comp="false"
category-filter-opt="no-filter"
```

```
no-rate="false"
no-weight="false"
summ-opt="0"
split-cmt="false"
rating-opt="0"
cmt-opt="0"
suppress-item-comments="0"
behavior-rating-opt="0"
behavior-cmt-opt="1"
behavior-mode-opt="0"
in-summ-display="true"
in-overall-rating="true"
no-group="true"
use-behavior="false"
if-no-ratings-then-ignore-section="true" l
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">
```

Attributes

Attribute	Description
index	A number that represents the display order of the section on the form, for example, 0, 1, 2, 3. When you move a section in Provisioning, the index number assigned to the section will be updated automatically to reflect how you have rearranged the sections on the form.
configurable	Set to `true` if you want to allow users to add and remove items within the section.
mgt-only	Set to `true` if only managers and HR should view the section.
use-jobcode	Used to auto-populate job-specific competencies to the section. See Auto-Populated Competencies for more information.
use-core-comp	Used to auto-populate core competencies to the section. See Auto-Populated Competencies for more information.
category-filter-opt	Set to `specified-category` if competencies shown in the section should be limited to specified competency categories. See Adding Competencies by Category for more information.
no-rate	Set to `false` if you want rating scale for items to appear within the section.

Attribute	Description
no-weight	Set to `false` if you want competency weights to show in the section and the section's average rating to be used in the calculated form rating. When you set the attribute to `true`, table reports will no longer generate a report on the section weight of the section. Once you set it back to `false`, the reports can pull the section weight again.
summ-opt	The maximum number of competencies to be shown in the section summary • To turn on the section summary, set the attribute to `0`. • To turn off the section summary, set the attribute to a large number, for example, `99999`.
split-cmt	Set to `true` if you want subject's and manager's comments to show side by side. ℹ Note In Performance Management, the attribute is always set to `true`.
rating-opt	Option values are `0` (default), `1`, `2`, and `3`. See Rating Options for more information.
cmt-opt	Four comment options are available. • `0` (default): Shows both item and section comments. • `1`: Shows only section comments, no item comments. • `2`: Shows only item comments, no section comments. • `3`: Shows no item and section comments.
suppress-item-comments	Only the default value `0` is available, which is used to show item comments.
behavior-rating-opt	The rating options for behaviors. See Rating Behaviors for more information.
behavior-cmt-opt	The comment options for behaviors. See Rating Behaviors for more information.
behavior-mode-opt	The display mode of behaviors when they are only shown but not rated. See Showing but Not Rating Behaviors for more information.
in-summ-display	Set to `true` if you want the section to show in the summary section.
in-overall-rating	Set to `true` if you want the section to be used in the calculated form rating. If `in-summ-display` and `in-overall-rating` are set to `false`, users receive `Final score is not available` in the Overall Score pod on forms.
no-group	Set to `false` if you want the competency groups that have been defined in the meta section to show in the section.
use-behavior	Set to `true` if you want users to rate behaviors instead of competencies. See Rating Behaviors for more information.
if-no-ratings-then-ignore-section	If the section has no ratings, it is excluded from the calculated form rating. To use 0 for the section in the calculated form rating, set the attribute to `false`.

Attribute	Description
lock-item-weights	Set to `true` if the weight of competencies shouldn't be edited.
in-objcomp-summ-display	Set to `true` if you want the section to show in the goal competency summary section.
in-objcomp-summ-overall-rating	Set to `true` if you want the section to be included in the overall competency rating in the goal competency summary section.
show-comp-expected-rat-ing	Set to `true` if you want competencies' expected rating for the employees' job role to show. It is required for showing the gap between expected and actual competency rating. When you set the attribute to `true`, you can configure the permission for the expected rating field using `expected-item-rating`. ℹ Note If you've upgraded to Talent Intelligence Hub, this attribute is **not** yet supported when users add competencies to the form through the picker. Users won't see expected ratings next to the competencies added to the form.
show-comp-proficiency-level	Set to `true` if you want the proficiency level of competencies to show.
comp-expected-rating-for-mat	Two formats are available. • `0` (default): Shows the expected rating in percentage (%). • `1`: Converts the percentage to a score normalized to the rating scale of the section.
show-behavior-expected-rating	Set to `true` if you want behaviors' expected rating for the employees' job role to show. When you set the attribute to `true`, you can configure the permission for the expected rating field using `expected-item-rating`. ℹ Note • This attribute should be ignored if `use-behavior` is set to `false`. • If you've upgraded to Talent Intelligence Hub, this attribute is **not** yet supported when users add behaviors to the form through the picker. Users won't see expected ratings next to the behaviors added to the form.
behavior-expected-rating-format	Two formats are available. • `0` (default): Shows the expected rating in percentage (%). • `1`: Converts the percentage to a score normalized to the rating scale of the section.
behavior-weighted	Set to `true` if you want behaviors to be weighted. Set to `false` if you want behaviors to be equally weighted and no weight fields to show.
min-competencies-required	The minimum number of competencies that must be in the section. It is validated when the form is routed.
max-competencies-allowed	The maximum number of competencies that are allowed to be in the section. It is validated when the form is routed.

Attribute	Description
sect-mode	Set to `EZ-Rater` if customers want to use the EZ Rater feature. See EZ Rater for more information.
ez-rater-expand-all	If the section is in the EZ Rater mode, to expand all competency details, set the attribute to `true`. See EZ Rater for more information.
show-calculated-section-rating	Set to `true` if you want the calculated section rating to show.
lock-behavior-content	If the value is `true`, behaviors are hardcoded to the form during form creation and modification, rather than being linked to the corresponding competency. When the job code changes or the behavior name or description is updated, the behaviors for the existing form do not reflect the changes. If the value is `false`, behaviors are not hardcoded to the form during form creation and modification, but are linked to the corresponding competency. When the job code changes or the behavior name or description is updated, the behaviors for the existing form reflect the changes. When the form is completed, the behaviors won't be updated anymore.
hide-waca	Set to `true` if you want Writing Assistant to be hidden from the section. It is only applicable when companies have enabled Writing Assistant. See Writing Assistant for more information.

Elements

Element	Description
comp-sect-name	The name of the section
comp-sect-intro	The introduction of the section
fm-sect-config	See Additional Form Section Configuration (fm-sect-config) for more information.
action-permission	See Form Permissions in XML Template for more information.
field-permission	
behavior-rating-calc	Expression for calculating individual behavior ratings
competency-rating-calc	Expression for calculating individual competency ratings
sect-weight	The weight of the section for the calculated form rating in the summary section
sect-weight-4-objcomp-summary	The weight of the section for the overall competency rating in the goal competency summary section
fm-sect-scale	See Rating Scales (fm-sect-scale) for more information.
fm-subitem-scale	Rating scale for behaviors. It is used only in the competency section if customers want to define a different rating scale or adjusted rating scale for behaviors.
comp-category	The filter of competency categories. See Adding Competencies by Category for more information.

Element	Description
sect-fm-elements	A list of `fm-element` attached to any competencies in the section
sect-level-elements	A list of `fm-element` attached to the section
fm-competency	Generic definition for custom competencies. See Adding Custom Competencies for more information.
fm-comment	Generic definition for comments
meta-grp-label	Label for form's available rating distribution groups
meta-grp	Form's available rating distribution groups
content-filters	A list of filters for filtering out competency libraries
fm-rating-info-config	An element for collecting additional rating information
fm-comp-filter-mapping	An element that allows competencies to be mapped beyond the Job Code value. Any standard user information field can be used for mapping competencies. See Mapping Competencies by Customized Data Types for more information.

Related Information

Auto-Populated Competencies [page 119]
Rating Options [page 51]
EZ Rater [page 209]
Writing Assistant [page 233]
Additional Form Section Configuration (fm-sect-config) [page 149]
Rating Scales (fm-sect-scale) [page 154]
Rating Behaviors [page 126]
Showing but Not Rating Behaviors [page 125]
Form Permissions in XML Template [page 164]

6.5.1 Auto-Populated Competencies

You define dedicated attributes or elements to determine which type of competencies are auto-populated to competency sections.

Competency Type	Attribute or Element Used	Description
Core competencies	`use-core-comp`	To auto-populate organization's core competencies, set this attribute to `true`. Core competencies will be added after any custom competencies and before any job-specific competencies.
Job-specific competencies	`use-jobcode`	To auto-populate competencies based on employee's job code, set this attribute to `true`. Only the competencies that correspond to employee's job code at the time that a form is created will appear on the form. If the job code is changed, which leads to the change to competencies, the competencies on the form won't be automatically changed. To update competencies, you need to re-create forms. **i Note** When a job code is mapped to multiple job roles and the job roles include the same competencies, the weights of those competencies are populated from the job role that comes first in the alphabetical order.
Custom competencies	`<fm-competency>`	To auto-populate custom competencies, define this element. See Adding Custom Competencies [page 120] for more information.
Competencies of specific categories	`<comp-category>`	To auto-populate job-specific competencies of specific competency categories, define this element. See Adding Competencies by Category [page 121] for more information.
Competencies with customized data types	`<fm-comp-filter-mapping>`	To auto-populate job-specific competencies by customized data type other than job code, define this element. This is applicable to customers using Job Description Manager. See Adding Competencies by Customized Data Type [page 123] for more information.

6.5.1.1 Adding Custom Competencies

You can add hard-coded competency ID and weight in the form template to use custom competencies in a competency section.

Procedure

1. In an XML form template, add the `<fm-competency>` element.

   > **i Note**
   >
   > For the location where the element should be added, refer to the DTD Definition section in Competency Section (competency-sect).

2. Specify the corresponding competency ID using `<fm-comp-id>` and if necessary, specify the competency weight using `<fm-comp-weight>`.

   You can get the competency ID from one of the following tools:

   - (For customers using Job Description Manager) *Admin Center or Provisioning* > *Manage Competencies*
   - (For customers using Center of Capabilities) *Admin Center* > *Manage Center of Capabilities*
   - (For customers using Talent Intelligence Hub) *Admin Center* > *Manage Talent Intelligence Hub*

   Sample Code

```
<competency-sect index="3" configurable= " false " mgt-only= " false " use-
jobcode= " false " category-filter-opt= "no-filter" no-rate= " false " no-
weight= " false " summ-opt= "99" split-cmt= " false " rating-opt= "1" cmt-
opt= "2" suppress-item-comments= "0" behavior-rating-opt= "0" behavior-cmt-
opt= "1" behavior-mode-opt= "0" in-summ-display= " true " in-overall-rating=
" true " no-group= " true " use-behavior= " false " if-no-ratings-then-ignore-
section= " false " lock-item-weights= " false " in-objcomp-summ-display= "
false " in-objcomp-summ-overall-rating= " false " show-comp-expected-rating=
" false " comp-expected-rating-format= "0" show-behavior-expected-rating= "
false " behavior-expected-rating-format= "0" behavior-weighted= " false "
sect-mode= "normal" ez-rater-expand-all= " false ">
     <comp-sect-name><![CDATA[Competencies]]></comp-sect-name>
     <comp-sect-intro><![CDATA[<b>Skills</b>]]></comp-sect-intro>
     <fm-sect-config>
         <rating-label><![CDATA[Leader Rating]]></rating-label>
         <rating-label-others><![CDATA[Associate Rating]]></rating-label-
others>
         < default-rating><![CDATA[Not Rated]]></ default-rating>
         <hidden-strength-threshold>0.0</hidden-strength-threshold>
         <blind-spot-threshold>0.0</blind-spot-threshold>
         <num-decimal-places>2</num-decimal-places>
         <publish-button-label><![CDATA[Publish Content]]></publish-button-
label>
     </fm-sect-config>
     <sect-weight>10.0</sect-weight>
     <fm-sect-scale show-value= " false ">
         <scale-source>1</scale-source>
         <scale-id><![CDATA[Competency Scale]]></scale-id>
         <scale-type><![CDATA[ null]]></scale-type>
     </fm-sect-scale>
```

```
        <fm-competency index= "0" removable= " false ">
            <fm-comp-id>4</fm-comp-id>
            <fm-comp-name><![CDATA[ null]]></fm-comp-name>
            <fm-comp-desc><![CDATA[ null]]></fm-comp-desc>
            <fm-comp-weight><![CDATA[15.0]]></fm-comp-weight>
        </fm-competency>
        <fm-competency index= "1" removable= " false ">
            <fm-comp-id>1159</fm-comp-id>
            <fm-comp-name><![CDATA[ null]]></fm-comp-name>
            <fm-comp-desc><![CDATA[ null]]></fm-comp-desc>
        </fm-competency>
        <meta-grp-label><![CDATA[Group]]></meta-grp-label>
  </competency-sect>
```

Related Information

Center of Capabilities
Talent Intelligence Hub

6.5.1.2 Adding Competencies by Category

You can pull job-specific competencies in a competency section by category.

Prerequisites

The `use-jobcode` attribute is set to `true` and the `category-filter-opt` attribute is set to `specified-category`.

Context

If customers want to have different competencies auto-populated to different competency sections, you can set category filters in the XML form template to determine which competencies should appear in a specific section.

> ⚠ Caution
>
> To use this feature, make sure that all sections that will populate job-specific competencies have a category filter assigned.

Procedure

1. In an XML form template, add the <comp-category> element.

 i Note

 For the location where the element should be added, refer to the DTD Definition section in Competency Section (competency-sect).

2. Specify one or more competency categories in the element.

 Sample Code

```
<competency-sect index="3" configurable= " false " mgt-only= " false "
use-jobcode= " true " category-filter-opt= "specified-category" no-rate= "
false " no-weight= " false " summ-opt= "99" split-cmt= " false " rating-
opt= "1" cmt-opt= "2" suppress-item-comments= "0" behavior-rating-opt= "0"
behavior-cmt-opt= "1" behavior-mode-opt= "0" in-summ-display= " true " in-
overall-rating= " true " no-group= " true " use-behavior= " false " if-
no-ratings-then-ignore-section= " false " lock-item-weights= " false " in-
objcomp-summ-display= " false " in-objcomp-summ-overall-rating= " false "
show-comp-expected-rating= " false " comp-expected-rating-format= "0" show-
behavior-expected-rating= " false " behavior-expected-rating-format= "0"
behavior-weighted= " false " sect-mode= "normal" ez-rater-expand-all= " false
">
     <comp-sect-name><![CDATA[Competencies]]></comp-sect-name>
     <comp-sect-intro><![CDATA[<b>Skills</b>]]></comp-sect-intro>
     <fm-sect-config>
         <rating-label><![CDATA[Leader Rating]]></rating-label>
         <rating-label-others><![CDATA[Associate Rating]]></rating-label-
others>
         < default-rating><![CDATA[Not Rated]]></ default-rating>
         <hidden-strength-threshold>0.0</hidden-strength-threshold>
         <blind-spot-threshold>0.0</blind-spot-threshold>
         <num-decimal-places>2</num-decimal-places>
         <publish-button-label><![CDATA[Publish Content]]></publish-button-
label>
     </fm-sect-config>
     <sect-weight>10.0</sect-weight>
     <fm-sect-scale show-value= " false ">
         <scale-source>1</scale-source>
         <scale-id><![CDATA[Competency Scale]]></scale-id>
         <scale-type><![CDATA[ null]]></scale-type>
     </fm-sect-scale>
     <comp-category><![CDATA[1. Thought Leadership (Development)]]></comp-
category>
     <comp-category><![CDATA[2. Results Leadership (Development)]]></comp-
category>
     <comp-category><![CDATA[3. People Leadership (Development)]]></comp-
category>
     <fm-competency index= "1" removable= " false ">
         <fm-comp-id>1159</fm-comp-id>
         <fm-comp-name><![CDATA[ null]]></fm-comp-name>
         <fm-comp-desc><![CDATA[ null]]></fm-comp-desc>
     </fm-competency>
     <meta-grp-label><![CDATA[Group]]></meta-grp-label>
</competency-sect>
```

6.5.1.3 Adding Competencies by Customized Data Type

For customers using Job Description Manager, you can pull job-specific competencies in a competency section by customized data type.

Prerequisites

- The `use-jobcode` attribute is set to `true`.
- You have access to 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.

Context

Generally, employees' competencies are auto-populated to a competency section according to their job code. You can use the `<fm-comp-filter-mapping>` element to customize the mapping data type.

Procedure

1. In Provisioning, configure the data types to be used for mapping competencies in the Succession Data Model.

   This example specifies that Job Code, Department, Division, Custom03, and Custom04 are valid mapping data types.

```
<view-template id="sysMappingDataTypes" visibility="none" pdf-printing-
enabled="true">
    <label>View Template for mapping data types</label>
    <description>This View Template is for Families and Roles mapping data
types</description>
    <edit-template id="sysMappingDataTypesEditTemplate">
        <label>Edit Template for Job Roles Data Type</label>
        <description>Edit Template for Job Roles Data Type </description>
        <standard-element-ref refid="jobCode"/>
        <standard-element-ref refid="department"/>
        <standard-element-ref refid="division"/>
        <standard-element-ref refid="custom03"/>
        <standard-element-ref refid="custom04"/>
    </edit-template>
</view-template>
```

2. Create a CSV file based on one particular mapping data type that you've configured, and import the file to *Admin Center* > *Import Job Roles*.

The file should include roles, families, values defined in the mapping data type, and competencies to be mapped.

3. In an XML form template, add the `<fm-comp-filter-mapping>` element.

> **Note**
>
> For the location where the element should be added, refer to the DTD Definition section in Competency Section (competency-sect).

4. Specify the mapping data type in the element.

   Only one mapping data type can be specified for one competency section. Employees' value for the specified mapping data type will be used for fetching the applicable job roles and the corresponding competencies.

   The default value of the `enable` attribute is `false`. To enable the feature, set it to `true`.

   This example shows how to map competencies based on Department.

```
<fm-comp-filter-mapping enable="true">
<fm-comp-filter-element refid="department"/>
</fm-comp-filter-mapping>
```

> **Sample Code**

```
<competency-sect index="3" configurable= " false " mgt-only= " false " use-
jobcode= " true " category-filter-opt= "no-filter" no-rate= " false " no-
weight= " false " summ-opt= "99" split-cmt= " false " rating-opt= "1" cmt-
opt= "2" suppress-item-comments= "0" behavior-rating-opt= "0" behavior-cmt-
opt= "1" behavior-mode-opt= "0" in-summ-display= " true " in-overall-rating=
" true " no-group= " true " use-behavior= " false " if-no-ratings-then-ignore-
section= " false " lock-item-weights= " false " in-objcomp-summ-display= "
false " in-objcomp-summ-overall-rating= " false " show-comp-expected-rating=
" false " comp-expected-rating-format= "0" show-behavior-expected-rating= "
false " behavior-expected-rating-format= "0" behavior-weighted= " false "
sect-mode= "normal" ez-rater-expand-all= " false ">
     <comp-sect-name><![CDATA[Competencies]]></comp-sect-name>
     <comp-sect-intro><![CDATA[<b>Skills</b>]]></comp-sect-intro>
     <fm-sect-config>
         <rating-label><![CDATA[Leader Rating]]></rating-label>
         <rating-label-others><![CDATA[Associate Rating]]></rating-label-
others>
         < default-rating><![CDATA[Not Rated]]></ default-rating>
         <hidden-strength-threshold>0.0</hidden-strength-threshold>
         <blind-spot-threshold>0.0</blind-spot-threshold>
         <num-decimal-places>2</num-decimal-places>
         <publish-button-label><![CDATA[Publish Content]]></publish-button-
label>
     </fm-sect-config>
     <sect-weight>10.0</sect-weight>
     <fm-sect-scale show-value= " false ">
         <scale-source>1</scale-source>
         <scale-id><![CDATA[Competency Scale]]></scale-id>
         <scale-type><![CDATA[ null]]></scale-type>
     </fm-sect-scale>
     <fm-competency index= "1" removable= " false ">
         <fm-comp-id>1159</fm-comp-id>
         <fm-comp-name><![CDATA[ null]]></fm-comp-name>
         <fm-comp-desc><![CDATA[ null]]></fm-comp-desc>
     </fm-competency>
     <meta-grp-label><![CDATA[Group]]></meta-grp-label>
     <fm-comp-filter-mapping enable="true">
     <fm-comp-filter-element refid="department"/>
     </fm-comp-filter-mapping>
```

```
</competency-sect>
```

6.5.2 Tips for Using Behaviors

Behaviors in a competency section can be configured in a flexible way. The following tips can help you configure and use the behaviors more effectively.

- To rate behaviors, set the `use-behavior` attribute to `true`, the `behavior-mode-opt` attribute to `0`, and the `behavior-rating-opt` attribute accordingly. All scenarios are invalid if you set `use-behavior` to `true` combined with `behavior-mode-opt` to 1, 2, 4, or 5.
- To show the mapped behaviors by job code only, set `behavior-mode-opt` to 1 or 2.
- To show all behaviors, set `behavior-mode-opt` to 4 or 5.
- If you've configured the settings to rate behaviors, behaviors are hardcoded to the form during form creation and modification and they won't be updated, regardless of whatever value the `lock-behavior-content` attribute may have.
- If you've configured the settings to only show behaviors, you can set `lock-behavior-content` to `true` to hardcode the behaviors to the form.
- To rate behaviors with Rating Option 3 and also define required fields, configure Unofficial User Rating instead of Subject Rating as the required field for employee self-rating. Therefore, required fields can work properly on the form and the Incomplete Items pod.

  Showing but Not Rating Behaviors [page 125]
  You can configure the `behavior-mode-opt` attribute for customers to show behaviors in addition to competencies but they still rate competencies.

  Rating Behaviors [page 126]
  You can configure the `use-behavior` attribute for customers to rate behaviors instead of competencies.

6.5.2.1 Showing but Not Rating Behaviors

You can configure the `behavior-mode-opt` attribute for customers to show behaviors in addition to competencies but they still rate competencies.

Procedure

1. In an XML form template, set the `use-behavior` attribute to `false`.
2. Specify a value for the `behavior-mode-opt` attribute.

Value	Description
0	Default value. No behaviors are shown on the form.

Value	Description
1	Behaviors are shown below the competency rating. Only the behaviors that are mapped to the competencies of employees' job code are shown. **i Note** The `use-jobcode` attribute must be set to `true`.
2	Behaviors are shown above the competency rating. Only the behaviors that are mapped to the competencies of employees' job code are shown. **i Note** The `use-jobcode` attribute must be set to `true`.
4	All behaviors that are mapped to competencies are shown below the competency rating.
5	All behaviors that are mapped to competencies are shown above the competency rating.

This is an example of `behavior-mode-opt="2"`.

Sample Code

```
<competency-sect index="3" configurable="false" mgt-only="false"
use-jobcode="true" category-filter-opt="no-filter" no-rate="false" no-
weight="true" summ-opt="999" split-cmt="false" rating-opt="3" cmt-opt="0"
suppress-item-comments="0" behavior-rating-opt="1" behavior-cmt-opt="1"
behavior-mode-opt="2" in-summ-display="true" in-overall-rating="true" no-
group="false" use-behavior="false" if-no-ratings-then-ignore-section="true"
lock-item-weights="false" in-objcomp-summ-display="false" in-objcomp-summ-
overall-rating="false" show-comp-expected-rating="false" comp-expected-rating-
format="0" show-behavior-expected-rating="false" behavior-expected-rating-
format="0" behavior-weighted="false" sect-mode="normal" ez-rater-expand-
all="false" show-calculated-section-rating="true">
```

6.5.2.2 Rating Behaviors

You can configure the `use-behavior` attribute for customers to rate behaviors instead of competencies.

Context

Behaviors are shown under each competency and can be rated. Competencies can't be rated and their rating is calculated based on the ratings of behaviors.

If users can rate behaviors, they can also add behaviors to the form. To achieve that, make sure that the `configurable` attribute is set to `true`.

Procedure

1. In an XML form template, set the `behavior-mode-opt` attribute to `0`.
2. Set the `use-behavior` attribute to `true`.
3. Specify the `behavior-cmt-opt` attribute to determine the comment options for behaviors.

Value	Description
0	Comments are enabled.
1	Comments are disabled.

4. Specify the `behavior-rating-opt` attribute to determine the rating options for behaviors.

Value	Description
0	Ratings are enabled for managers only.
1	Ratings are enabled for employees and managers.
2	Ratings are enabled for all.

> **Note**
>
> If `behavior-cmt-opt` is 1, regardless of the value of `behavior-rating-opt`, ratings are enabled for managers only.

6.6 Summary Section (summary-sect)

You can find the DTD definition, attributes, and elements applicable to this section. This topic lists only the attributes and elements that are commonly used. For more information, refer to the latest DTD file.

DTD Definition

```
<!ELEMENT summary-sect (summary-sect-name?, summary-sect-intro?, fm-sect-config?,
action-permission*, field-permission*, official-rating-permission*, enforce-
maximum-overall-score?, fm-sect-scale?, summary-rating?, cal-summary-rating?,
unadjusted-overall-summary-rating?, overall-rating-label?, calc-rating-label?,
unadjusted-calc-rating-label?, group-matrix-other-label?, manual-rating-label?,
final-comment-label?, show-gap-competencies-in-summary?, allow-close-individual-gap-
in-summary?, show-gap-behaviors-in-summary?, show-behaviors-in-summary?, show-cdp-
wizard-button?, fm-element*, fm-comment*)>
```

```
<!ATTLIST summary-sect
    index CDATA #REQUIRED
    mgt-only (true | false) "false"
    ask-4-comment (true | false) "false"
    manual-rating (true | false) "true"
    override-unrated (true | false) "false"
    split-cmt (true | false) "false"
```

```
    rating-opt CDATA "0"
    cmt-opt (0 | 1) "0"
    cmt-max-limit CDATA "-1"
    show-listing (true | false) "true"
    rating-mode CDATA "text"
    use-adjusted-scale-for-section-header-rating (0 | 1 | 2) "0"
    show-group-matrix (true | false) "true"
    overall-rating-display-order (manual-calc | calc-manual) "manual-calc"
    pdf-page-break-opt (0 | 1 | 2) #IMPLIED
>
```

Attributes

Attribute	Description
index	A number that represents the display order of the section on the form, for example, 0, 1, 2, 3. 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.
mgt-only	Set to `true` if you want only managers and HR to view the section.
manual-rating	Set to `true` to allow users to give an overall rating for the summary section. If it's set to `false`, the calculated rating is the overall rating, `fm-sect-scale` is ignored, and users aren't allowed to override it.
override-unrated	This attribute is applicable only if `manual-rating` is `true`. • Set this value to `false` to define manual rating always as the overall rating. • Set this value to `true` to define the calculated rating as the overall rating when 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 overridden by the calculated rating. • If the manual rating is unrated when the form is routed, then the overall rating will be overridden by the calculated rating.
split-cmt	Set to `true` if you want the subject's and manager's comments to show side by side. **i Note** In Performance Management, the attribute is always set to `true`.
rating-opt	Option values are `0` (default), `1`, `2`, and `3`. See Rating Options for more information.

Attribute	Description
cmt-opt	Four comment options are available. • `0` (default): Shows both item and section comments. • `1`: Shows only section comments, no item comments. • `2`: Shows only item comments, no section comments. • `3`: Shows no item and section comments.
show-listing	Set to `true` to allow listing.
rating-mode	Use this attribute to configure the rating format. • `text` (default): displays ratings in text. • `graph`: displays ratings in a graphical format. • `mixed`: displays ratings in both text and graphical formats. If you use `graph` or `mixed` for `rating-mode`, the graphical rating bars only appear in completed forms.
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 can have subtotals using the same adjusted scale values defined in the meta section. • 0 (default): Displays the manual or calculated rating. For calculated ratings, there's only rating value without rating label. • 1: Uses the adjusted scale to display the adjusted rating label and value for the manual or calculated rating. • 2: Displays the original rating with the label defined in the adjusted scale. **i Note** In Performance Management, the adjusted rating for goal or competency section isn't supported in the summary section.
show-group-matrix	Set to `true` to display group matrix in the section.
overall-rating-display-order	The value is `manual-calc`. The manual rating is always shown above the calculated rating.

Elements

Element	Description
summary-sect-name	The name of the section
summary-sect-intro	The introduction of the section
fm-sect-config	See Additional Form Section Configuration (fm-sect-config) for more information.
field-permission	See Form Permissions in XML Template for more information.
fm-sect-scale	Not supported

Element	Description
summary-rating	Overall form rating. By default it's the calculated average rating of all sections included in overall calculation.
calc-summary-rating	Calculated form rating
unadjusted-overall-summary-rating	The original calculated form rating before any adjustments based on the adjusted scale
overall-rating-label	A non-zero-length string (including whitespace) will override 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 override 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 override the default `Other` label.
show-gap-behaviors-in-summary	The behaviors for each competency, if rated by behavior, are shown in the summary section along with the gap analysis.
show-behaviors-in-summary	The behaviors for each competency, if rated by behavior, are shown in the summary section.
show-gap-competencies-in-summary	The gap analysis scale for competencies is shown in the summary section.
allow-close-individual-gap-in-summary	If this element is added to the summary section, a clickable link will be available in the form for each competency, to which users can add development goals.

Related Information

Rating Options [page 51]
Additional Form Section Configuration (fm-sect-config) [page 149]
Form Permissions in XML Template [page 164]

6.6.1 Configuring Enforce Maximum Overall Score in XML Template

Configure Enforce Maximum Overall Score (EMOS) to set limitations on the rating that a specified role can give to an employee.

Prerequisites

The `manual-rating` attribute is set to `true`.

Context

Hre is an EMOS example. For role EM, if the goal section's item rating is below or equal to 3.0, and the competency section's item rating is below or equal to 4.0, then the maximum manual overall score cannot be greater than 2.0.

Procedure

1. In an XML form template, add the `<enforce-maximum-overall-score>` element to the summary section.

   Sample Code

   ```
   <enforce-maximum-overall-score condition='and'>
     <role-name>EM</role-name>
     <max-score>2.0</max-score>
   </enforce-maximum-overall-score>
   ```

   Note

   - If no role is specified (`role-name` is `*`), the EMOS rule applies to all roles.
   - Set `condition` to `or` if you want to trigger the EMOS rule when either of the conditions is satisfied.

2. In the goal section for which you want to configure EMOS, add the `<emos-min-score>` element.

   Sample Code

   ```
       <objective-sect index="1" ...>
         <obj-sect-name><![CDATA[Objective Section Name]]></obj-sect-name>
         <fm-sect-config>
           ...
         </fm-sect-config>
         ...
         <emos-min-score>3.0</emos-min-score>
         <sect-weight>50.0</sect-weight>
         ...
       </objective-sect>
   ```

3. In the competency section for which you want to configure EMOS, add the `<emos-min-score>` element.

Sample Code

```
<competency-sect index="2" ...>
  <comp-sect-name><![CDATA[Competency Section Name]]></comp-sect-name>
  <fm-sect-config>
    ...
  </fm-sect-config>
  ...
  <emos-min-score>4.0</emos-min-score>
  <sect-weight>50.0</sect-weight>
  ...
</competency-sect>
```

6.7 Goal Competency Summary Section (objcomp-summary-sect)

You can find the DTD definition, attributes, and elements applicable to this section. This topic lists only the attributes and elements that are commonly used. For more information, refer to the latest DTD file.

DTD Definition

```
<!ELEMENT objcomp-summary-sect (oc-sect-name?, oc-sect-intro?, fm-sect-config?,
field-permission*, matrix-grid-id?, matrix-grid-version?, comp-scale?, obj-scale?,
scale-adjusted-matrix?, grid-bg-color?, x-axis-label?, y-axis-label?, x-axis?, y-
axis?,
comp-summary-rating?, adjusted-comp-cal-summary-rating?, comp-cal-summary-rating?,
comp-cal-summary-weight?, comp-summary-rating-label?, comp-cal-summary-rating-
label?,
adjusted-comp-cal-summary-rating-label?, obj-summary-rating?, adjusted-obj-cal-
summary-rating? ,
obj-cal-summary-rating?, obj-cal-summary-weight?, obj-summary-rating-label?,
obj-cal-summary-rating-label?, adjusted-obj-cal-summary-rating-label?, fm-comment*)>
```

```
<!ATTLIST objcomp-summary-sect
    index CDATA #REQUIRED
    mgt-only (true | false) "false"
    comp-manual-rating (true | false) "true"
    obj-manual-rating (true | false) "true"
    comp-cal-rating (true | false) "true"
    obj-cal-rating (true | false) "true"
    split-cmt (true | false) "false"
    rating-opt CDATA "0"
    cmt-opt (0 | 1) "0"
    cmt-max-limit CDATA "-1"
    show-listing (true | false) "true"
    show-ococ-rating (true | false) "false"
    rating-mode CDATA "text"
    show-9box (true | false) "true"
    overall-rating-display-order (manual-calc | calc-manual) "manual-calc"
    section-display-order (comp-obj | obj-comp) "comp-obj"
    ococ-rating-calc-mode (matrix-lookup | avg | sum) "matrix-lookup"
```

```
    pdf-page-break-opt (0 | 1 | 2) #IMPLIED
>
```

Attributes

Attribute	Description
index	A number that represents the display order of the section on the form, for example, 0, 1, 2, 3. When you move a section in Provisioning, the index number assigned to the section will be updated automatically to reflect how you have rearranged the sections on the form.
mgt-only	Set to `true` if only managers and HR should view the section.
comp-manual-rating	Set to `true` if you allow the overall competency rating to be edited. Set to `false` if the overall competency rating should be the calculated rating.
obj-manual-rating	Set to `true` if you allow the overall goal rating to be edited. Set to `false` if the overall goal rating should be the calculated rating.
comp-cal-rating	Set to `true` if the overall competency rating should be calculated and shown. i Note If you set this attribute to `true`, the `<sect-weight-4-objcomp-summary>` element shoud be configured in competency sections.
obj-cal-rating	Set to `true` if the overall goal rating should be calculated and shown. i Note If you set this attribute to `true`, the `<sect-weight-4-objcomp-summary>` element shoud be configured in goal sections.
split-cmt	Set to `true` if you want subject's and manager's comments to show side by side.
rating-opt	The value is `0`. No ratings are next to each user's comment.
cmt-opt	Two comment options are available. • `0`: Shows section comments. • `1` (default): No section comments.
cmt-max-limit	Set to `-1` if you want section comments not to have a maximum character limit. Set to a value greater than `-1` if you want section comments to have a specified maximum character limit.
show-ococ-rating	Set to `true` to enable *OCOC Rating*.
rating-mode	Set to `text` to show ratings in text.
show-9box	Set to `true` to enable the chart of goal and competency ratings.

Attribute	Description
overall-rating-display-order	The value is `manual-calc`. The manual rating is always shown above the calculated rating.
section-display-order	Two display orders are available. • `comp-obj`: Competency sections are shown above goal sections. • `obj-comp`: Goal sections are shown above competency sections.
ococ-rating-calc-mode	Three calculation methods are available to calculate OCOC rating. • `matrix-lookup` (default): The OCOC rating is determined by the matrix lookup table defined in the `<scale-adjusted-matrix>` element. • `avg`: The OCOC rating is calculated by averaging the sum of the goal and competency ratings, for example, `sum (rating * weight) / sum (weight)`. • `sum`: The OCOC rating is calculated by the sum of the goal and competency ratings, `sum (rating * weight) / 100`. **Note** To ignore weights in calculating the OCOC rating, you also need to set the `rate-by-adding-values` attribute in the `<sf-pmreview>` element to `true`.
pdf-page-break-opt	Three options are available. • `0` (default): Page breaks are allowed in the PDF version. • `1`: Page breaks are avoided at the section level in the PDF version. • `2`: Page breaks at both the section level and item level are avoided in the PDF version.

Elements

Element	Description
oc-sect-name	The name of the section
oc-sect-intro	The introduction of the section
fm-sect-config	See Additional Form Section Configuration (fm-sect-config) for more information.
field-permission	See Form Permissions in XML Template for more information.
matrix-grid-id	The value must be `howvswhat_matrix_grid_report`.
comp-scale	See Configuring Matrix Grid Rating Scales for more information.
obj-scale	See Configuring Matrix Grid Rating Scales for more information.
scale-adjusted-matrix	See Configuring Matrix Lookup Table for OCOC Rating for more information.

Element	Description
x-axis	The x-axis of the chart for either the overall goal rating or the overall competency rating
y-axis	The y-axis of the chart for either the overall goal rating or the overall competency rating
comp-cal-summary-weight	The weight of the calculated competency rating for calculating OCOC rating by the average or sum method
comp-summary-rating-label	The label of *Overall Form Rating* for competencies can be configured.
comp-cal-summary-rating-label	The label of *Calculated Form Rating* for competencies can be configured.
obj-cal-summary-weight	The weight of the calculated goal rating for calculating OCOC rating by the average or sum method
obj-summary-rating-label	The label of *Overall Form Rating* for goals can be configured.
obj-cal-summary-rating-label	The label of *Calculated Form Rating* for goals can be configured.

Related Information

Additional Form Section Configuration (fm-sect-config) [page 149]
Configuring Matrix Grid Rating Scales [page 69]
Configuring Matrix Lookup Table for OCOC Rating [page 135]
Form Permissions in XML Template [page 164]

6.7.1 Configuring Matrix Lookup Table for OCOC Rating

If you enable OCOC rating, the default calculation method is using a matrix lookup table, so you need to define the table using the `<scale-adjusted-matrix>` element.

Context

The mapped score for the OCOC rating is determined based on the overall goal rating and overall competency rating. For example, if the overall goal rating is from 1.0 to 1.49 and the overall competency rating is from 1.0 to 1.49, the OCOC rating should be 1.0.

Procedure

1. In an XML form template, add the `<scale-adjusted-matrix>` element.

i Note

For the location where the element should be added, refer to the DTD Definition section in Goal Competency Summary Section (objcomp-summary-sect).

2. Define the matrix lookup table according to customer's business needs.

i Note

The `<rating-label>` element under `<scale-adjusted-matrix>` is used to define the label of OCOC rating.

If you don't use the matrix lookup table for OCOC rating but want to change the OCOC rating label, set the `enable` attribute of `scale-adjusted-matrix` from `true` to `false`.

Sample Code

```
<scale-adjusted-matrix enable="true"  show-value="true">
    <rating-label><![CDATA[Overall Performance Rating]]></rating-label>
    <default-rating><![CDATA[unrated]]></default-rating>
    <matrix-map-value>
      <obj-score-min>1.0</obj-score-min>
      <obj-score-max>1.49</obj-score-max>
      <comp-score-min>1.0</comp-score-min>
      <comp-score-max>1.49</comp-score-max>
      <mapto-score>1.0</mapto-score>
      <mapto-desc><![CDATA[Below]]></mapto-desc>
    </matrix-map-value>
    <matrix-map-value>
      <obj-score-min>1.5</obj-score-min>
      <obj-score-max>2.49</obj-score-max>
      <comp-score-min>1.0</comp-score-min>
      <comp-score-max>1.49</comp-score-max>
      <mapto-score>1.0</mapto-score>
      <mapto-desc><![CDATA[Below]]></mapto-desc>
    </matrix-map-value>
    <matrix-map-value>
      <obj-score-min>2.5</obj-score-min>
      <obj-score-max>3.49</obj-score-max>
      <comp-score-min>1.0</comp-score-min>
      <comp-score-max>1.49</comp-score-max>
      <mapto-score>1.0</mapto-score>
      <mapto-desc><![CDATA[Below]]></mapto-desc>
    </matrix-map-value>
    <matrix-map-value>
      <obj-score-min>3.5</obj-score-min>
      <obj-score-max>4.49</obj-score-max>
      <comp-score-min>1.0</comp-score-min>
      <comp-score-max>1.49</comp-score-max>
      <mapto-score>1.0</mapto-score>
      <mapto-desc><![CDATA[Below]]></mapto-desc>
    </matrix-map-value>
    <matrix-map-value>
      <obj-score-min>4.5</obj-score-min>
      <obj-score-max>5.0</obj-score-max>
      <comp-score-min>1.0</comp-score-min>
      <comp-score-max>1.49</comp-score-max>
      <mapto-score>1.0</mapto-score>
      <mapto-desc><![CDATA[Below]]></mapto-desc>
    </matrix-map-value>
    <matrix-map-value>
      <obj-score-min>1.0</obj-score-min>
      <obj-score-max>1.49</obj-score-max>
      <comp-score-min>1.5</comp-score-min>
```

```
        <comp-score-max>2.49</comp-score-max>
        <mapto-score>1.0</mapto-score>
        <mapto-desc><![CDATA[Below]]></mapto-desc>
      </matrix-map-value>
      <matrix-map-value>
        <obj-score-min>1.0</obj-score-min>
        <obj-score-max>1.49</obj-score-max>
        <comp-score-min>2.5</comp-score-min>
        <comp-score-max>3.49</comp-score-max>
        <mapto-score>1.0</mapto-score>
        <mapto-desc><![CDATA[Below]]></mapto-desc>
      </matrix-map-value>
      <matrix-map-value>
        <obj-score-min>1.0</obj-score-min>
        <obj-score-max>1.49</obj-score-max>
        <comp-score-min>3.5</comp-score-min>
        <comp-score-max>4.49</comp-score-max>
        <mapto-score>1.0</mapto-score>
        <mapto-desc><![CDATA[Below]]></mapto-desc>
      </matrix-map-value>
      <matrix-map-value>
        <obj-score-min>1.0</obj-score-min>
        <obj-score-max>1.49</obj-score-max>
        <comp-score-min>4.5</comp-score-min>
        <comp-score-max>5.0</comp-score-max>
        <mapto-score>1.0</mapto-score>
        <mapto-desc><![CDATA[Below]]></mapto-desc>
      </matrix-map-value>
      <matrix-map-value>
        <obj-score-min>1.5</obj-score-min>
        <obj-score-max>2.49</obj-score-max>
        <comp-score-min>1.5</comp-score-min>
        <comp-score-max>2.49</comp-score-max>
        <mapto-score>2.0</mapto-score>
        <mapto-desc><![CDATA[Meets-]]></mapto-desc>
      </matrix-map-value>
      <matrix-map-value>
        <obj-score-min>2.5</obj-score-min>
        <obj-score-max>3.49</obj-score-max>
        <comp-score-min>1.5</comp-score-min>
        <comp-score-max>2.49</comp-score-max>
        <mapto-score>2.0</mapto-score>
        <mapto-desc><![CDATA[Meets-]]></mapto-desc>
      </matrix-map-value>
      <matrix-map-value>
        <obj-score-min>1.5</obj-score-min>
        <obj-score-max>2.49</obj-score-max>
        <comp-score-min>2.5</comp-score-min>
        <comp-score-max>3.49</comp-score-max>
        <mapto-score>2.0</mapto-score>
        <mapto-desc><![CDATA[Meets-]]></mapto-desc>
      </matrix-map-value>
      <matrix-map-value>
        <obj-score-min>2.5</obj-score-min>
        <obj-score-max>3.49</obj-score-max>
        <comp-score-min>2.5</comp-score-min>
        <comp-score-max>3.49</comp-score-max>
        <mapto-score>3.0</mapto-score>
        <mapto-desc><![CDATA[Meets]]></mapto-desc>
      </matrix-map-value>
      <matrix-map-value>
        <obj-score-min>3.5</obj-score-min>
        <obj-score-max>4.49</obj-score-max>
        <comp-score-min>2.5</comp-score-min>
        <comp-score-max>3.49</comp-score-max>
        <mapto-score>3.0</mapto-score>
        <mapto-desc><![CDATA[Meets]]></mapto-desc>
      </matrix-map-value>
```

```
        <matrix-map-value>
          <obj-score-min>2.5</obj-score-min>
          <obj-score-max>3.49</obj-score-max>
          <comp-score-min>3.5</comp-score-min>
          <comp-score-max>4.49</comp-score-max>
          <mapto-score>3.0</mapto-score>
          <mapto-desc><![CDATA[Meets]]></mapto-desc>
        </matrix-map-value>
        <matrix-map-value>
          <obj-score-min>1.5</obj-score-min>
          <obj-score-max>2.49</obj-score-max>
          <comp-score-min>3.5</comp-score-min>
          <comp-score-max>4.49</comp-score-max>
          <mapto-score>3.0</mapto-score>
          <mapto-desc><![CDATA[Meets]]></mapto-desc>
        </matrix-map-value>
        <matrix-map-value>
          <obj-score-min>1.5</obj-score-min>
          <obj-score-max>2.49</obj-score-max>
          <comp-score-min>4.5</comp-score-min>
          <comp-score-max>5.0</comp-score-max>
          <mapto-score>3.0</mapto-score>
          <mapto-desc><![CDATA[Meets]]></mapto-desc>
        </matrix-map-value>
        <matrix-map-value>
          <obj-score-min>3.5</obj-score-min>
          <obj-score-max>4.49</obj-score-max>
          <comp-score-min>1.5</comp-score-min>
          <comp-score-max>2.49</comp-score-max>
          <mapto-score>3.0</mapto-score>
          <mapto-desc><![CDATA[Meets]]></mapto-desc>
        </matrix-map-value>
        <matrix-map-value>
          <obj-score-min>4.5</obj-score-min>
          <obj-score-max>5.0</obj-score-max>
          <comp-score-min>1.5</comp-score-min>
          <comp-score-max>2.49</comp-score-max>
          <mapto-score>3.0</mapto-score>
          <mapto-desc><![CDATA[Meets]]></mapto-desc>
        </matrix-map-value>
        <matrix-map-value>
          <obj-score-min>3.5</obj-score-min>
          <obj-score-max>4.49</obj-score-max>
          <comp-score-min>3.5</comp-score-min>
          <comp-score-max>4.49</comp-score-max>
          <mapto-score>4.0</mapto-score>
          <mapto-desc><![CDATA[Meets+]]></mapto-desc>
        </matrix-map-value>
        <matrix-map-value>
          <obj-score-min>2.5</obj-score-min>
          <obj-score-max>3.49</obj-score-max>
          <comp-score-min>4.5</comp-score-min>
          <comp-score-max>5.0</comp-score-max>
          <mapto-score>4.0</mapto-score>
          <mapto-desc><![CDATA[Meets+]]></mapto-desc>
        </matrix-map-value>
        <matrix-map-value>
          <obj-score-min>4.5</obj-score-min>
          <obj-score-max>5.0</obj-score-max>
          <comp-score-min>2.5</comp-score-min>
          <comp-score-max>3.49</comp-score-max>
          <mapto-score>4.0</mapto-score>
          <mapto-desc><![CDATA[Meets+]]></mapto-desc>
        </matrix-map-value>
        <matrix-map-value>
          <obj-score-min>3.5</obj-score-min>
          <obj-score-max>4.49</obj-score-max>
          <comp-score-min>4.5</comp-score-min>
```

```
      <comp-score-max>5.0</comp-score-max>
      <mapto-score>5.0</mapto-score>
      <mapto-desc><![CDATA[Exceeds]]></mapto-desc>
    </matrix-map-value>
    <matrix-map-value>
      <obj-score-min>4.5</obj-score-min>
      <obj-score-max>5.0</obj-score-max>
      <comp-score-min>3.5</comp-score-min>
      <comp-score-max>4.49</comp-score-max>
      <mapto-score>5.0</mapto-score>
      <mapto-desc><![CDATA[Exceeds]]></mapto-desc>
    </matrix-map-value>
    <matrix-map-value>
      <obj-score-min>4.5</obj-score-min>
      <obj-score-max>5.0</obj-score-max>
      <comp-score-min>4.5</comp-score-min>
      <comp-score-max>5.0</comp-score-max>
      <mapto-score>5.0</mapto-score>
      <mapto-desc><![CDATA[Exceeds]]></mapto-desc>
    </matrix-map-value>
  </scale-adjusted-matrix>
```

6.8 Performance Potential Summary Section (perfpot-summary-sect)

You can find the DTD definition, attributes, and elements applicable to this section. This topic lists only the attributes and elements that are commonly used. For more information, refer to the latest DTD file.

DTD Definition

```
<!ELEMENT perfpot-summary-sect (pp-sect-name, pp-sect-intro?, fm-sect-config?,
field-permission*, perf-scale?, pot-scale?, manual-performance-rating?,
manual-performance-rating-label?, manual-potential-rating?, manual-potential-rating-
label?,
fm-comment*, sect-level-elements?)>
```

```
<!ATTLIST perfpot-summary-sect
    index CDATA #REQUIRED
    mgt-only (true | false) "false"
    perf-manual-rating (true | false) "true"
    pot-manual-rating (true | false) "true"
    cmt-opt (0 | 1) "0"
    cmt-max-limit CDATA "-1"
    show-9box (true | false) "true"
    section-display-order (perf-pot | pot-perf) "perf-pot"
    pdf-page-break-opt (0 | 1 | 2) #IMPLIED
>
```

Attributes

Attribute	Description
index	A number that represents the display order of the section on the form, for example, 0, 1, 2, 3. When you move a section in Provisioning, the index number assigned to the section will be updated automatically to reflect how you've rearranged the sections on the form.
mgt-only	Set to `true` if you want only managers and HR to view the section.
perf-manual-rating	Set to `true` to include a manual performance rating in the section.
pot-manual-rating	Set to `true` to include a manual potential rating in the section.
cmt-opt	Two comment options are available. • `0`: Shows section comments. • `1` (default): No section comments.
show-9box	Set to `true` to enable a chart of performance and potential ratings.

Elements

Element	Description
pp-sect-name	The name of the section
pp-sect-intro	The introduction of the section
fm-sect-config	See Additional Form Section Configuration (fm-sect-config) for more information.
field-permission	See Form Permissions in XML Template for more information.
perf-scale	See Configuring Matrix Grid Rating Scales for more information.
pot-scale	See Configuring Matrix Grid Rating Scales for more information.
manual-performance-rating	The default value of the performance rating
manual-performance-rating-label	The label of the performance rating field
manual-potential-rating	The default value of the potential rating
manual-potential-rating-label	The label of the potential rating field
fm-comment	Generic definition for comments
sect-level-elements	A list of `fm-element` attached to the section

Element	Description
perfpot-matrix-grid-filter	Use this element to determine who should be shown on the chart based on the filter option at Succession Management. You have two filter options: • `form-subject`: Shows only form subject on the chart. • `sm-matrix-grid-permissions`: Shows only form subject on the chart based on the Succession Management matrix grid permissions. As a precondition of this setting, enable Succession Management and grant the matrix grid report permission for users. Sample Code `<perfpot-matrix-grid-filter filter-option="form-subject">` `<role-name>EM</role-name>` `<route-step stepid="2"/>` `</perfpot-matrix-grid-filter>` Note This element doesn't check role names or route steps. It only checks whether the filter is included into the performance potential summary section.

Related Information

Additional Form Section Configuration (fm-sect-config) [page 149]
Configuring Matrix Grid Rating Scales [page 69]
Form Permissions in XML Template [page 164]

6.9 Customized Weighted Rating Section (customized-weighted-rating-sect)

The Customized Weighted Rating section displays the calculation details that arrive at the calculated form rating and supports two overall scores: the calculated rating and the manual rating.

You can find the DTD definition, attributes, and elements applicable to this section.

DTD Definition

```
<!--
PM Customized Weighted Rating Section.
```

```
    manual-rating: DEFAULT "true" allow manual rating to overwrite the calculated
rating
-->
<!ELEMENT customized-weighted-rating-sect (cwr-sect-name?, cwr-sect-intro?,
cwr-calculated-rating-label?, cwr-manual-rating-label?, fm-sect-config?, field-
permission*, fm-sect-scale?)>
<!ATTLIST customized-weighted-rating-sect
    index CDATA #REQUIRED
    mgt-only (true | false) "false"
    manual-rating (true | false) "true"
    override-unrated (true | false) "false"
>
<!ELEMENT cwr-sect-name (#PCDATA)>
<!ATTLIST cwr-sect-name
    msgKey CDATA #IMPLIED
    ver CDATA #IMPLIED
>
<!ELEMENT cwr-sect-intro (#PCDATA)>
<!ATTLIST cwr-sect-intro
    msgKey CDATA #IMPLIED
    ver CDATA #IMPLIED
>
<!ELEMENT cwr-calculated-rating-label (#PCDATA)>
<!ATTLIST cwr-calculated-rating-label
    msgKey CDATA #IMPLIED
    ver CDATA #IMPLIED
>
<!ELEMENT cwr-manual-rating-label (#PCDATA)>
<!ATTLIST cwr-manual-rating-label
    msgKey CDATA #IMPLIED
    ver CDATA #IMPLIED
>
```

Attributes

Attribute	Description
index	The order in which sections are displayed in the form is controlled by a section index number starting with `index="0"`. As a result, the form XML can list sections in any order. When you move sections, the index number assigned to a section is updated automatically to reflect how you've rearranged the sections in the form.
mgt-only	Set to `true` if only managers and HR should see this section.
manual-rating	Set to `true` to include a manual rating in the section.

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 overridden 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.

Elements

Element	Description
cwr-sect-name	The name of the section
cwr-sect-intro	The introduction of the section
cwr-calculated-rating-label	Used to define the label of the calculated rating field
cwr-manual-rating-label	Used to define the label of the manual rating field
fm-sect-config	Extra configuration about the section
field-permission	Permissions "read", "write", or "none" set with `<cwr-calculated-rating>` or `<cwr-manual-rating>`.
fm-sect-scale	Rating scale associated with this section

6.9.1 XML Example: Customized Weighted Rating Section

This is an example of a customized weighted rating section in an XML form template.

```
<customized-weighted-rating-sect index="1" mgt-only="false" manual-rating="true"
override-unrated="true">
  <cwr-sect-name><![CDATA[Customized Weighted Rating]]></cwr-sect-name>
  <cwr-sect-intro><![CDATA[]]></cwr-sect-intro>
  <cwr-calculated-rating-label><![CDATA[Customized Calculated Rating Label]]></cwr-
calculated-rating-label>
  <cwr-manual-rating-label><![CDATA[Customized Manual Rating Label]]></cwr-manual-
rating-label>
  <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>
  <field-permission type="read">
    <role-name>E</role-name>
    <role-name>EM</role-name>
    <field refid="cwr-calculated-rating">
      <owner-role>*</owner-role>
    </field>
    <route-step stepid="170332421074186"/>
    <route-step stepid="M1"/>
  </field-permission>
  <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>
</customized-weighted-rating-sect>
```

6.10 Miscellaneous Sections

When you configure a miscellaneous form section, use the corresponding section element with a nested `<fm-sect>` element.

Section	Element
Employee information section	`<userinfo-sect>`
Introduction section	`<introduction-sect>`
Review dates section	`<reviewinfo-sect>`
Signature section	`<signature-sect>` You can only specify signature section name and introduction. Other elements within this section will be ignored.
Custom section	`<custom-sect>`
Job description section	`<job-desc-sect>` This section shows the job-related information from Job Description Manager. If you use Job Profile Builder, the section is not supported.

DTD Definition

```
<!ELEMENT fm-sect (fm-sect-name,fm-sect-intro?, fm-sect-config?, fm-element*, fm-
comment*, fm-add-element?)>
```

```
<!ATTLIST fm-sect
index CDATA #REQUIRED
mgt-only (true | false) "false"
ask-4-comment (true | false) "false"
split-cmt (true | false) "false"
cmt-opt (0 | 1) "0"
>
```

Attributes

Attribute	Description
index	A number that represents the display order of the section on the form, for example, 0, 1, 2, 3. When you move a section in Provisioning, the index number assigned to the section will be updated automatically to reflect how you have rearranged the sections on the form.
mgt-only	Set to `true` if you want only managers and HR to view the section.
split-cmt	Set to `true` if you want the subject's and manager's comments to show side by side. **Note** In Performance Management, the attribute is always set to `true`.
cmt-opt	Four comment options are available. • `0` (default): Shows both item and section comments. • `1`: Shows only section comments, no item comments. • `2`: Shows only item comments, no section comments. • `3`: Shows no item and section comments.

Elements

Element	Description
fm-sect-name	The name of the section ℹ Note • The review dates section uses `<reviewinfo-sect-name>` for section name. • The job description section uses `<job-desc-sect-name>` for section name.
fm-sect-intro	The introduction of the section ℹ Note • The review dates section uses `<reviewinfo-sect-intro>` for section introduction. • The job description section uses `<job-desc-sect-intro>` for section introduction.
fm-sect-config	See Additional Form Section Configuration (fm-sect-config) for more information.
fm-element	See Employee Information Section (userinfo-sect) for more information.
fm-comment	Generic definition for comments
fm-add-element	Used to add custom fields

Related Information

Additional Form Section Configuration (fm-sect-config) [page 149]
Employee Information Section (userinfo-sect) [page 146]

6.10.1 Employee Information Section (userinfo-sect)

The employee information section uses the `<fm-element>` element to show employee information, which comes from the data elements in the employee table.

The following are accepted data elements:

- USERNAME
- FIRSTNAME
- LASTNAME

- MI
- GENDER
- EMAIL
- MANAGER
- HR
- DEPARTMENT
- JOBCODE
- DIVISION
- LOCATION
- TIMEZONE
- HIREDATE
- EMPID
- TITLE
- BIZ_PHONE
- FAX
- ADDR1
- ADDR2
- CITY
- STATE
- ZIP
- COUNTRY
- REVIEW_FREQ
- LAST_REVIEW_DATE
- CUSTOM01
- CUSTOM02
- CUSTOM03
- CUSTOM04
- CUSTOM05
- CUSTOM06
- CUSTOM07
- CUSTOM08
- CUSTOM09
- CUSTOM10
- CUSTOM11
- CUSTOM12
- CUSTOM13
- CUSTOM14
- CUSTOM15
- MATRIX_MANAGER

Attributes

Attribute	Description
index	A number that represents the display order of employee information. The index of the first element should be set to `0`.
type	The data type of employee information, which should be `3` (text).
sync-until-completion	By default, each data element displayed reflects the latest employee data at the time when the form is opened. You can set this attribute to `false` to preserve the original employee information when the form was created, regardless of data changes after that. If you set this attribute to `false`, the following elements in table reports reflect the data at the time of form launch: • Manager • Division • Department • Location

Elements

Element	Description
ekey	The text entered in this element should reflect the static name as listed in the first row of the user import file.
ename	This element should be left blank. It reflects the text that is associated with the field in the User Directory Settings.
evalue	This element should be left blank.

Example

Sample Code

```
<userinfo-sect>
  <fm-sect index="1" mgt-only="false" split-cmt="false" cmt-opt="1">
    <fm-sect-name><![CDATA[Employee Information]]></fm-sect-name>
    <fm-sect-intro><![CDATA[]]></fm-sect-intro>
    <fm-sect-config>
      <rating-label><![CDATA[Rating]]></rating-label>
      <rating-label-others><![CDATA[Rating]]></rating-label-others>
      <default-rating><![CDATA[unrated]]></default-rating>
      <hidden-strength-threshold>0.0</hidden-strength-threshold>
```

```
        <blind-spot-threshold>0.0</blind-spot-threshold>
        <num-decimal-places>2</num-decimal-places>
        <publish-button-label><![CDATA[Publish Content]]></publish-button-label>
      </fm-sect-config>
      <fm-element index="0" type="3">
        <ekey><![CDATA[FIRSTNAME]]></ekey>
        <ename><![CDATA[]]></ename>
        <evalue><![CDATA[]]></evalue>
      </fm-element>
      <fm-element index="1" type="3">
        <ekey><![CDATA[LASTNAME]]></ekey>
        <ename><![CDATA[]]></ename>
        <evalue><![CDATA[]]></evalue>
      </fm-element>
      <fm-element index="2" type="3">
        <ekey><![CDATA[HR]]></ekey>
        <ename><![CDATA[]]></ename>
        <evalue><![CDATA[]]></evalue>
      </fm-element>
      <fm-element index="3" type="3">
        <ekey><![CDATA[USERNAME]]></ekey>
        <ename><![CDATA[]]></ename>
        <evalue><![CDATA[]]></evalue>
      </fm-element>
    </fm-sect>
  </userinfo-sect>
```

6.11 Additional Form Section Configuration (fm-sect-config)

You can use the `<fm-sect-config>` element to configure additional section-level features. You can find the DTD definition and elements applicable to this element.

DTD Definition

```
<!ELEMENT fm-sect-config (rating-label?, rating-label-others?, default-rating?,
unrated-rating?,
weight-total?, hidden-strength-threshold?, blind-spot-threshold?, rating-bar-
color?, item-weights?,
hide-weight-percent-sign?, weight-label?, show-points?, section-comments-label?,
section-comments-blank-indicator?, section-manager-comments-label?, section-subject-
comments-label?,
comments-blank-indicator?, manager-comments-label?, subject-comments-label?,
calculated-rating-label?,
rating-display-format?, section-permission*, section-owner*, required-fields*,
calibration-mode?,
show-job-roles?, default-section-comments-label?, default-item-comments-label?,
weight-total-option?,
num-decimal-places?, publish-button-label?, publish-button-warning?, field-
publishing*, section-rating-calc?,
section-item-rating-calc?, ez-rater?, normalize-section-rating?)>
```

Elements

Element	Description
rating-label	The label of the official rating field. The default value is `Rating`.
rating-label-others	The label of unofficial rating fields, including unofficial user rating and subject rating. The default value is `Rating`. **Note** This label can be configured to show as *Rating by {employee name}* on the form. However, in the PDF and print version, the label is always shown as *Rating*.
default-rating	The label that is shown in the rating field if users haven't given a rating. The value in reports is shown as blank.
unrated-rating	The label of a special rating on the rating scale, for example, Too New to Rate. Performance reviewers can select this rating when they think it's too early to give a regular rating. This value is not included in the calculation.
weight-total	The total weight for a section. Negative number or null means ignoring the validation of the total weight. See also the `<weight-total-option>` element.
item-weights	The range of weights for a goal or competency. Use the `<item-weight-floor>` and `<item-weight-ceiling>` subelements to set the minimum weight required and the maximum weight allowed respectively. If the parameters are not met when the form is sent, a warning message is displayed.
hide-weight-percent-sign	The option to hide the percentage symbol (%) next to the weight for items. This element can be applied to goal section, competency section, summary section, and goal competency summary section.
weight-total-option	The option to show a warning or error message when the total weight validation is not passed. The configuration is relevant only if the `<weight-total>` element is also specified. Two valid values are available: • `enforce`: An error message is shown. Weights must add up to the specified value otherwise users cannot save or forward the form. • `warn` (default): A warning message is shown.

Element	Description
	ℹ Note If you use this option and don't allow ratings in forms, make sure that `no-rate` is set to `false` and rating fields are hidden from users. This is because forms must be rated to account for weights, even if forms don't count the ratings in.
normalize-section-rating	The option to normalize ratings to a rating scale at the section level. The default value is `true`. If customers want to disable normalization, set the value to `false`. This element can be applied to goal section, competency section, summary section, and goal competency summary section. To enable or disable normalization for the overall form rating at the form level, use the `<meta-normalize-form-rating>` element under `<fm-meta>` and set the value to `true` or `false` accordingly.
publish-button-label publish-button-warning field-publishing rating-bar-color	Not supported in Performance Management

6.11.1 Configuring Required Fields in XML Template

Configure required fields in a specific step to require users to complete the fields before they send the form.

Procedure

1. In an XML form template, add the `<required-fields>` element under `<fm-sect-config>` in a specific section.
2. Specify the role, field, step, and send action accordingly.

Subelement	Description
`<role-name>`	Role value. Example: E, EM
`<field>`	Field in the section. Example: Item Rating

Subelement	Description
	If the field is a text or text area field, you can also specify `min-value` and `max-value`.
`<route-step>`	Step ID
`<send-action>`	Action when required fields are validated. The following actions are supported: • `inner_step_send`: The form is sent within an iterative step or sent to someone within the current step, or someone replies within the current step. • `next_step`: The form is sent to the next step. • `sign`: The form is signed in a signature step.

In this example, managers are required to complete the item rating field in a specific step before they send the form to next step.

Sample Code

```
<fm-sect-config>
  <rating-label><![CDATA[Rating]]></rating-label>
  <rating-label-others><![CDATA[Rating]]></rating-label-others>
  <default-rating>Select a rating...</default-rating>
  <unrated-rating>Unable to Rate</unrated-rating>
  <hidden-strength-threshold>0.0</hidden-strength-threshold>
  <blind-spot-threshold>0.0</blind-spot-threshold>
  <required-fields>
    <role-name>EM</role-name>
    <field refid="item-rating" min-value="-1.0" max-value="-1.0"/>
    <route-step stepid="phase3"/>
    <send-action sendid="next_step"/>
  </required-fields>
  <num-decimal-places>2</num-decimal-places>
  <publish-button-label><![CDATA[Publish Content]]></publish-button-label>
</fm-sect-config>
```

In this example, managers are required to complete a custom text field with no more than five characters in a specific step before they send the form to the next step.

Sample Code

```
<fm-sect-config>
  <rating-label><![CDATA[Rating]]></rating-label>
  <rating-label-others><![CDATA[Rating]]></rating-label-others>
  <default-rating>Select a rating...</default-rating>
  <unrated-rating>Unable to Rate</unrated-rating>
  <hidden-strength-threshold>0.0</hidden-strength-threshold>
  <blind-spot-threshold>0.0</blind-spot-threshold>
  <required-fields>
    <role-name>EM</role-name>
    <field refid="custom-element" min-value="1.0" max-value="5.0">
      <ekey>target1</ekey>
    </field>
    <route-step stepid="manager"/>
    <send-action sendid="next_step"/>
  </required-fields>
```

```
    <num-decimal-places>2</num-decimal-places>
    <publish-button-label><![CDATA[Publish Content]]></publish-button-label>
  </fm-sect-config>
```

6.11.2 XML Example: Customized Rating Labels

This is an example of customized rating labels.

```
<fm-sect-config>
  <rating-label><![CDATA[Official Rating]]></rating-label>
  <rating-label-others><![CDATA[Unofficial Rating]]></rating-label-others>
  <default-rating><![CDATA[unrated]]></default-rating>
  <hidden-strength-threshold>0.0</hidden-strength-threshold>
  <blind-spot-threshold>0.0</blind-spot-threshold>
  <section-permission type="hidden">
    <role-name>*</role-name>
  </section-permission>
  <num-decimal-places>2</num-decimal-places>
  <publish-button-label><![CDATA[Publish Content]]></publish-button-label>
</fm-sect-config>
```

6.11.3 XML Example: Customized Default Rating and Unrated Rating

This is an example of customized default rating and unrated rating.

```
<fm-sect-config>
  <rating-label><![CDATA[Official Rating]]></rating-label>
  <rating-label-others><![CDATA[Unofficial Rating]]></rating-label-others>
  <default-rating>Choose One</default-rating>
  <unrated-rating>Not Observed</unrated-rating>
  <hidden-strength-threshold>0.0</hidden-strength-threshold>
  <blind-spot-threshold>0.0</blind-spot-threshold>
  <section-permission type="hidden">
    <role-name>*</role-name>
  </section-permission>
  <num-decimal-places>2</num-decimal-places>
  <publish-button-label><![CDATA[Publish Content]]></publish-button-label>
</fm-sect-config>
```

6.11.4 XML Example: Customized Comment Labels

This is an example of customized comment labels for managers and employees at the item and section level.

```
<fm-sect-config>
  <rating-label><![CDATA[Rating]]></rating-label>
  <rating-label-others><![CDATA[Rating]]></rating-label-others>
  <default-rating>Select a rating...</default-rating>
  <unrated-rating>Unable to Rate</unrated-rating>
```

```
  <hidden-strength-threshold>0.0</hidden-strength-threshold>
  <blind-spot-threshold>0.0</blind-spot-threshold>
  <section-manager-comments-label><![CDATA[Manager'''s Section Comments]]></section-manager-comments-label>
  <section-subject-comments-label><![CDATA[Employee'''s Section Comments]]></section-subject-comments-label>
  <manager-comments-label><![CDATA[Manager'''s Item Comments]]></manager-comments-label>
  <subject-comments-label><![CDATA[Employee'''s Item Comments]]></subject-comments-label>
  <num-decimal-places>2</num-decimal-places>
  <publish-button-label><![CDATA[Publish Content]]></publish-button-label>
</fm-sect-config>
```

Note

You need to type ''' to get an apostrophe (') in the customized label output.

6.12 Rating Scales (fm-sect-scale)

Use this element to associate a rating scale with a goal section, competency section or summary section.

DTD Definition

```
<!ELEMENT fm-sect-scale (scale-source?, scale-id, scale-type?, scale-value*, scale-adjusted-calculation?)>
```

```
<!ATTLIST fm-sect-scale show-value (true | false) "true" reverse-scale (true | false) #IMPLIED >
```

Attributes

Attribute	Description
show-value	Use this attribute to configure the rating format. • `true`: The rating is displayed as stars. • `false`: The rating is displayed as a dropdown list. To use the circle rating format, you can enable it in *Admin Center* > *Form Template Settings*. **Note** If a rating scale has more than 5 rating values, it can only display as a dropdown list and cannot be changed to other rating format.
reverse-scale	See Reversing a Rating Scale.

Elements

Element	Description
scale-id	The name of the rating scale
scale-type	Scale type. Set this value to `NULL`.

Related Information

Reversing a Rating Scale [page 157]

6.12.1 Mapping Rating Scales to Sections

Map rating scales to goal, competency, and summary sections so that users can give ratings on the form.

Context

By default, rating fields in goal and competency sections show the defined unrated rating and default rating, which are not editable on the form. You must map rating scales to the sections respectively to enable ratings.

You can map only one rating scale to one section. If multiple rating scales are mapped to sections in one form, ensure the rating scales have the same point scale.

Procedure

1. To map a rating scale to a goal or competency section, add the `<fm-sect-scale>` element to `<objective-sect>` or `<competency-sect>`.

   Sample Code

```
<objective-sect index="3" configurable="true" mgt-only="false" use-
jobcode="false" no-rate="false" no-weight="false" summ-opt="999999" split-
cmt="false" rating-opt="0" cmt-opt="0" in-summ-display="true" in-overall-
rating="true" no-group="true" use-milestone="false"if-no-ratings-then-ignore-
section="false" lock-item-weights="false">
  <obj-sect-name><![CDATA[Performance Objectives]]></obj-sect-name>
  <obj-sect-intro><![CDATA[Objective Intro Text]]></obj-sect-intro>
  <fm-sect-config>
    <rating-label><![CDATA[Rating]]></rating-label>
    <rating-label-others><![CDATA[Rating]]></rating-label-others>
    <default-rating><![CDATA[unrated]]></default-rating>
    <hidden-strength-threshold>0.0</hidden-strength-threshold>
    <blind-spot-threshold>0.0</blind-spot-threshold>
  </fm-sect-config>
  <sect-weight><![CDATA[0.0]]></sect-weight>
  <fm-sect-scale show-value="true">
    <scale-id><![CDATA[Default Scale]]></scale-id>
    <scale-type><![CDATA[null]]></scale-type>
  </fm-sect-scale>
  <obj-sect-type><![CDATA[plan]]></obj-sect-type>
  <obj-sect-plan-id>1</obj-sect-plan-id>
  <meta-grp-label><![CDATA[Group]]></meta-grp-label>
</objective-sect>
```

2. To map a rating scale to a summary section, add the `<fm-sect-scale>` element to `<fm-meta>`.

   Sample Code

```
<fm-meta>
  <meta-form-id>-1</meta-form-id>
  <meta-rated>true</meta-rated>
  <meta-rating>0.0</meta-rating>
  <meta-scale>0.0</meta-scale>
  <meta-grp-label><![CDATA[Group]]></meta-grp-label>
  <fm-sect-scale show-value="true">
    <scale-id><![CDATA[Performance & Development Scale]]></scale-id>
    <scale-type><![CDATA[null]]></scale-type>
  </fm-sect-scale>
  <meta-item-weight-floor-ceiling-option>warning</meta-item-weight-floor-
ceiling-option>
</fm-meta>
```

6.12.2 Reversing a Rating Scale

Reverse a rating scale so that the smallest number becomes the highest rating score.

Context

Generally in a rating scale the largest number is the highest rating and the smallest number the lowest. You can use the `reverse-scale` attribute to reverse the order. Read the following notes when using a reversed rating scale:

- **Reversed rating scales don't work with expected rating**: Expected rating is a value that administrators set for the competencies assigned to a job role. So, whenever an employee tries to rate a competency, a value is shown below the rating that specifies the expected rating for that job role. The problem is the expected rating won't be reversed together with the rating scale.
  For example, if the expected rating for an individual competency is set to 20%, and the default 5-point rating scale is used (1 being the lowest rating and 5 being the highest), then the normalized expected rating for this scenario is shown as 1, which is considered as the lowest value. In this case, if the rating scale is reversed (1 being the highest rating and 5 being the lowest), the normalized expected rating will still be shown as 1, which is now considered as the highest rating.
- **Reversed rating scales don't work with star rating format**: A reversed rating scale is always selected using a dropdown menu.
- **Reversed rating scales don't work with the chart in goal competency summary section**: The goal competency summary section calculates three ratings: an overall goal rating, an overall competency rating, and an overall goal competency rating. These ratings are calculated as an aggregation of the ratings from all the goal sections and competency sections to determine the quadrant in which an employee falls on the rating chart. When a reversed rating scale is used to calculate these ratings, the quadrant doesn't change according to the reversed rating scale.

Procedure

In the `<fm-sect-scale>` element, set the `reverse-scale` attribute to `true`.

Sample Code

```
<fm-sect-scale show-value="true" reverse-scale="true">
  <scale-id><![CDATA[Default Scale]]></scale-id>
  <scale-type><![CDATA[null]]></scale-type>
</fm-sect-scale>
```

Note

If you use multiple rating scales in one form, ensure to reverse all the rating scales so that users don't get confused or make accidental rating errors.

6.12.3 Configuring Scale Adjusted Calculation in XML Template

Configure scale adjusted calculation to adjust the calculated form rating to a fixed rating value, so that the calculated form rating with a decimal can be shown as an integer with a rating description.

Procedure

1. In an XML form template, add the `<scale-adjusted-calculation>` element under `<fm-sect-scale>` under `<fm-meta>`.
2. Set the `enable` attribute to `true`.
3. Optional: Set the `display-calculated-rating` attribute to `true` if you want to show the original calculated form rating under the adjusted calculated form rating.
4. Specify the following subelements to define adjusted ratings.

Subelement	Description
`<score-min>`	The lowest possible rating of the calculated form rating that will be adjusted to a fixed value. Example: 0.1
`<score-max>`	The highest possible rating of the calculated form rating that will be adjusted to a fixed value. Example: 1.49
`<mapto-score>`	A fixed value to which the calculated form rating in the range from `<score-min>` to `<score-max>` will be adjusted. Example: 1.0
`<mapto-desc>`	The rating description of the fixed value. Example: Below Expectations

Sample Code

```
<fm-meta>
  <meta-form-id>-1</meta-form-id>
  <meta-rated>true</meta-rated>
  <meta-rating>0.0</meta-rating>
  <meta-scale>0.0</meta-scale>
  <meta-grp-label><![CDATA[Group]]></meta-grp-label>
  <fm-sect-scale show-value="true">
    <scale-source>1</scale-source>
    <scale-id><![CDATA[Performance & Development Scale]]></scale-id>
    <scale-type><![CDATA[null]]></scale-type>
    <scale-adjusted-calculation enable="true" display-calculated-
rating="false">
      <rating-label><![CDATA[Overall Rating:]]></rating-label>
      <default-rating><![CDATA[Unrated]]></default-rating>
      <scale-map-value>
        <score-min>0.1</score-min>
        <score-max>1.49</score-max>
        <mapto-score>1.0</mapto-score>
        <mapto-desc><![CDATA[Below Expectations]]></mapto-desc>
      </scale-map-value>
      <scale-map-value>
        <score-min>1.5</score-min>
        <score-max>2.49</score-max>
```

```
        <mapto-score>2.0</mapto-score>
        <mapto-desc><![CDATA[Meets Some Expectations]]></mapto-desc>
      </scale-map-value>
      <scale-map-value>
        <score-min>2.5</score-min>
        <score-max>3.49</score-max>
        <mapto-score>3.0</mapto-score>
        <mapto-desc><![CDATA[Meets Expectations]]></mapto-desc>
      </scale-map-value>
      <scale-map-value>
        <score-min>3.5</score-min>
        <score-max>4.49</score-max>
        <mapto-score>4.0</mapto-score>
        <mapto-desc><![CDATA[Exceeds Some Expectations]]></mapto-desc>
      </scale-map-value>
      <scale-map-value>
        <score-min>4.5</score-min>
        <score-max>5.99</score-max>
        <mapto-score>5.0</mapto-score>
        <mapto-desc><![CDATA[Exceeds Expectations]]></mapto-desc>
      </scale-map-value>
    </scale-adjusted-calculation>
  </fm-sect-scale>
  <meta-item-weight-floor-ceiling-option>warning</meta-item-weight-floor-
ceiling-option>
</fm-meta>
```

5. Set the `use-adjusted-scale-for-section-header-rating` attribute in the summary section to 1.

6.13 Custom Fields (fm-element)

You can find the DTD definition, attributes, and elements applicable to custom fields.

DTD Definition

```
<!ELEMENT fm-element (ekey, ename?, evalue?, elist?, text-size?, text-maxlength?)>
```

```
<!ATTLIST fm-element
 index CDATA #REQUIRED
 type (1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10) #REQUIRED
 checked (true | false) "false"
 min CDATA #IMPLIED
 max CDATA #IMPLIED
 sync-until-completion (true | false) "true"
 waca (true | false) "false"
>
```

Attributes

Attribute	Description
index	A number that represents the display order of custom fields. The index of the first element should be set to `0`.
type	The data type of custom fields. Each of the numbers from 2 to 9 represents a specific data type. • 2: Label • 3: Text • 4: Text area • 5: Date • 6: List • 7: Integer • 8: Double • 9: Checkbox For more information on data types, see Configuring Custom Fields.
checked	This attribute is only applicable to checkbox. The value is `true` if the checkbox is selected by default.
sync-until-completion	This attribute is not relevant to custom fields but used in the employee information section. See Employee Information Section (userinfo-sect) for more information.
waca	This attribute is applicable to text area in competency sections. The value is `true` if Writing Assistant is enabled for the custom field.

Elements

Element	Description
ekey	The key of custom fields. The value should always be one word and you can use mixed cases and underscores. The value must be unique for each custom field within the same form. Though using the same value doesn't fail the form template validation, it may lead to unexpected issues and will cause a problem in reporting.
ename	The label of custom fields. Its length should be 128 characters or fewer. Otherwise, this will cause a problem if any custom database reports need to be run on the data.
evalue	The default value of custom fields.

Element	Description
	i Note If you use a checkbox type, you must specify the evalue such as `True`, `Y`, `Yes`. This is the value that will be stored when users select the checkbox. If you don't specify a value, no value will be stored in the database.
elist	This element is only applicable to list. See Configuring a Custom Dropdown List Field for more information.
text-size	The width of the text field in pixel.

Related Information

Employee Information Section (userinfo-sect) [page 146]
Configuring Custom Fields [page 89]
Configuring a Custom Dropdown List Field [page 161]

6.13.1 Configuring a Custom Dropdown List Field

Configure a custom dropdown list field in an XML form template according to customer's business needs.

Procedure

1. In an XML form template, add the `<fm-element>` element.

   > **i Note**
   >
   > For the location where the element should be added, refer to the DTD definition of a specific section.

2. Specify the common attributes and elements of custom fields, for example, `index`, `type`, `<ekey>`, and `<ename>`.

   > **i Note**
   >
   > Leave the `<evalue>` element blank if customers use one of the following scenarios:
   >
   > - The Incomplete Items pod is used.
   > - The custom dropdown list field is configured with different access permissions for users.

3. Specify the `<elist>` element to define a data type and dropdown values.
   a. Use the `elist-value-type` attribute to define the data type of the dropdown list.

Available types are: 3 - text, 5 - date, and 7 - integer.

b. Use the <elist-element> subelement to define dropdown values.

If a picklist is defined, the dropdown list is loaded from the picklist.

The following table shows the subelements available under <elist-element>.

Subelement	Description
elist-default-name	The first choice shown in the dropdown list
elist-default-value	The value to be reported if no choice is selected
elist-name	The name of the choice shown in the dropdown list
elist-value	The value of the choice in reporting

This is an example of a custom dropdown list field in a goal section.

Sample Code

```
<objective-sect index="3" configurable="true" mgt-only="false" use-
jobcode="false" no-rate="false" no-weight="false" summ-opt="999999" split-
cmt="false" rating-opt="0" cmt-opt="0" in-summ-display="true" in-overall-
rating="true" no-group="true" use-milestone="false"if-no-ratings-then-ignore-
section="false" lock-item-weights="false">
 <obj-sect-name><![CDATA[Performance Objectives]]></obj-sect-name>
 <obj-sect-intro><![CDATA[Objective Intro Text]]></obj-sect-intro>
 <fm-sect-config>
  <rating-label><![CDATA[Rating]]></rating-label>
  <rating-label-others><![CDATA[Rating]]></rating-label-others>
  <default-rating><![CDATA[unrated]]></default-rating>
  <hidden-strength-threshold>0.0</hidden-strength-threshold>
  <blind-spot-threshold>0.0</blind-spot-threshold>
 </fm-sect-config>
 <sect-weight><![CDATA[0.0]]></sect-weight>
 <fm-sect-scale show-value="true">
  <scale-id><![CDATA[Default Scale]]></scale-id>
  <scale-type><![CDATA[null]]></scale-type>
 </fm-sect-scale>
 <obj-sect-type><![CDATA[plan]]></obj-sect-type>
 <obj-sect-plan-id>1</obj-sect-plan-id>
 <sect-fm-elements>
  <fm-element index="0"
type="6">
    <ekey><![CDATA[SumCareerObj]]></ekey>
    <ename><![CDATA[Employee's job satisfaction:]]></ename>
    <evalue><![CDATA[]]></evalue>
    <elist elist-value-type="7" elist-default-name="None Selected" elist-
default-value="">
       <elist-element elist-index="0" elist-selected="false">
          <elist-name><![CDATA[Satisfied with current position]]></elist-name>
          <elist-value><![CDATA[Satisfied]]></elist-value>
       </elist-element>
       <elist-element elist-index="1" elist-selected="false">
          <elist-name><![CDATA[Interested in future opportunities]]></elist-
name>
          <elist-value><![CDATA[Dissatisfied]]></elist-value>
       </elist-element>
    </elist>
  </fm-element>
 </sect-fm-elements>
</objective-sect>
```

6.13.2 XML Example: Custom Checkbox Field

This is an example of a custom checkbox field.

```
<fm-element index="0" type="9">
  <ekey><![CDATA[EmpMgrMeetingCheckBox]]></ekey>
  <ename><![CDATA[Check  to indicate that the Employee Dialog Meeting has
occurred]]></ename>
  <evalue><![CDATA[Y ]]></evalue>
</fm-element>
```

6.13.3 XML Example: Custom Field in a Goal Section

This is an example of a custom field that is displayed between each goal's description and rating in a goal section.

> **Note**
>
> When you define the custom field, it appears for each item and not just once in the section.

```
<objective-sect index="3" configurable="true" mgt-only="false" use-jobcode="false"
no-rate="false" no-weight="false" summ-opt="999999" split-cmt="false" rating-
opt="0" cmt-opt="0" in-summ-display="true" in-overall-rating="true" no-
group="true" use-milestone="false"if-no-ratings-then-ignore-section="false" lock-
item-weights="false">
 <obj-sect-name><![CDATA[Performance Objectives]]></obj-sect-name>
 <obj-sect-intro><![CDATA[Objective Intro Text]]></obj-sect-intro>
 <fm-sect-config>
  <rating-label><![CDATA[Rating]]></rating-label>
  <rating-label-others><![CDATA[Rating]]></rating-label-others>
  <default-rating><![CDATA[unrated]]></default-rating>
  <hidden-strength-threshold>0.0</hidden-strength-threshold>
  <blind-spot-threshold>0.0</blind-spot-threshold>
 </fm-sect-config>
 <sect-weight><![CDATA[0.0]]></sect-weight>
 <fm-sect-scale show-value="true">
  <scale-id><![CDATA[Default Scale]]></scale-id>
  <scale-type><![CDATA[null]]></scale-type>
 </fm-sect-scale>
 <obj-sect-type><![CDATA[plan]]></obj-sect-type>
 <obj-sect-plan-id>1</obj-sect-plan-id>
 <sect-fm-elements>
      <fm-element index="0" type="4">
        <ekey><![CDATA[PerformanceMeasures]]></ekey>
        <ename><![CDATA[Performance Measures:]]></ename>
        <evalue><![CDATA[]]></evalue>
      </fm-element>
 </sect-fm-elements>
</objective-sect>
```

6.14 Form Permissions in XML Template

Learn about the form permissions for buttons, tabs, sections, actions, and fields in an XML form template.

Permission	Element in XML Template	Location in XML Template	Examples	More Information
Button Permissions	`<button-permission>`	In the meta section (`<fm-meta>`)	XML Example: Button Permissions [page 164]	Button Permissions [page 76]
Tab Permissions	`<tab-permission>`	• To configure the permissions at the form level: In the meta section (`<fm-meta>`) • To configure the permissions at the section level: In available sections	XML Example: Tab Permissions [page 165]	Tab Permissions [page 79]
Section Permissions	`<section-permission>`	Under the `<fm-sect-config>` element of available sections	XML Example: Section Permissions [page 168]	Section Permissions [page 80]
Action Permissions	`<action-permission>`	In available sections	XML Example: Action Permissions [page 168]	Action Permissions [page 81]
Field Permissions	`<field-permission>`	In available sections	XML Example: Field Permissions [page 169]	Field Permissions [page 82]

6.14.1 XML Example: Button Permissions

Learn about button permission examples in an XML form template.

Example 1

In this example, employee is the only role who can't see the *Get Feedback* button in all steps.

```
<button-permission type="none">
    <role-name>E</role-name>
    <button refid="get-comments"/>
    <route-step stepid="*"/>
</button-permission>
<button-permission type="none">
    <role-name>E</role-name>
    <button refid="get-edits"/>
    <route-step stepid="*"/>
</button-permission>
```

Example 2

In this example, manager is the only role who can see the *Add Modifier* button in all steps.

```
<button-permission type="none">
    <role-name>*</role-name>
    <button refid="add-modifier" />
    <route-step stepid="*" />
</button-permission>
<button-permission type="enabled">
    <role-name>EM</role-name>
    <button refid="add-modifier" />
    <route-step stepid="*" />
</button-permission>
```

6.14.2 XML Example: Tab Permissions

Learn about tab permission examples in an XML form template.

Example 1

In this example, nobody can view the *Goal Details*, *Other Details*, and *Achievements* tabs in a goal section.

```
<objective-sect index="0" configurable="true" mgt-only="false" use-jobcode="false"
no-rate="false" develop-goal="false" show-learning-activity-competency="false" no-
weight="true" summ-opt="999" split-cmt="true" rating-opt="3" cmt-opt="3" in-summ-
display="true" in-overall-rating="true" no-group="false" use-milestone="false"
if-no-ratings-then-ignore-section="true" lock-item-weights="false" in-objcomp-summ-
display="true" in-objcomp-summ-overall-rating="true" auto-pop-weights="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="popup" show-calculated-section-rating="true" avoid-obj-plan-
state-change-by-multiple-forms="false" use-mlt-rating-if-present="false">
  <obj-sect-name msgKey="PM_GoalSection_name"><![CDATA[Goals]]></obj-sect-name>
  <obj-sect-intro msgKey="PM_GoalSection_intro"></obj-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 msgKey="PM_GoalSection_defaultrating"><![CDATA[Select a
rating...]]></default-rating>
    <unrated-rating msgKey="PM_GoalSection_unrated"><![CDATA[Unable to Rate]]></
unrated-rating>
    <weight-total><![CDATA[100.0]]></weight-total>
    <hidden-strength-threshold>0.0</hidden-strength-threshold>
    <blind-spot-threshold>0.0</blind-spot-threshold>
    <item-weights>
      <item-weight-floor>0.0</item-weight-floor>
      <item-weight-ceiling>100.0</item-weight-ceiling>
    </item-weights>
    <section-comments-label msgKey="PM_GoalSection_sectcomment"><![CDATA[Overall
Section Comments]]></section-comments-label>
    <section-manager-comments-label msgKey="PM_GoalSection_sectmgrcomment"><!
[CDATA[{0}'''s Comments]]></section-manager-comments-label>
    <section-subject-comments-label msgKey="PM_GoalSection_sectsubjcomment"><!
[CDATA[{0}'''s Comments]]></section-subject-comments-label>
```

```
    <manager-comments-label msgKey="PM_GoalSection_mgrcomment"><![CDATA[{0}'''s
Comments]]></manager-comments-label>
    <subject-comments-label msgKey="PM_GoalSection_subjcomment"><![CDATA[{0}'''s
Comments]]></subject-comments-label>
    <weight-total-option><![CDATA[enforce]]></weight-total-option>
    <num-decimal-places>2</num-decimal-places>
    <publish-button-label><![CDATA[Publish Content]]></publish-button-label>
  </fm-sect-config>
  <tab-permission type="none">
    <role-name>*</role-name>
    <tab refid="goal-details"/>
    <tab refid="other-details"/>
    <tab refid="achievements"/>
    <route-step stepid="*"/>
  </tab-permission>
  <sect-weight>50.0</sect-weight>
  <sect-weight-4-objcomp-summary>50.0</sect-weight-4-objcomp-summary>
  <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>
  <obj-sect-type autosync="true"><![CDATA[plan]]></obj-sect-type>
  <obj-sect-plan-id>10</obj-sect-plan-id>
  <meta-grp-label><![CDATA[Group]]></meta-grp-label>
</objective-sect>
```

Example 2

In this example, only managers can view the *Ratings from Others* tab in all steps for available sections.

```
<fm-meta>
  <meta-form-id>-1</meta-form-id>
  <meta-rated>true</meta-rated>
  <meta-rating>0.0</meta-rating>
  <meta-scale>0.0</meta-scale>
  <meta-grp-label><![CDATA[Group]]></meta-grp-label>
  <fm-sect-scale show-value="true">
    <scale-source>1</scale-source>
    <scale-id><![CDATA[2005b]]></scale-id>
    <scale-type><![CDATA[null]]></scale-type>
  </fm-sect-scale>
  <meta-item-weight-floor-ceiling-option>warning</meta-item-weight-floor-ceiling-
option>
  <others-ratingtab-permission type="none">
    <role-name>*</role-name>
    <route-step stepid="*"/>
  </others-ratingtab-permission>
  <others-ratingtab-permission type="enabled">
    <role-name>EM</role-name>
    <route-step stepid="*"/>
  </others-ratingtab-permission>
</fm-meta>
```

Example 3

You can use the `<others-ratingtab-item-permission>` element at the section level to configure the field permissions on the *Ratings from Others* tab. In this example, nobody can view the Item Rating field on the tab in a goal section in a specific step.

```
<objective-sect index="0" configurable="true" mgt-only="false" use-jobcode="false"
no-rate="false" develop-goal="false" show-learning-activity-competency="false" no-
weight="true" summ-opt="999" split-cmt="true" rating-opt="3" cmt-opt="3" in-summ-
display="true" in-overall-rating="true" no-group="false" use-milestone="false"
if-no-ratings-then-ignore-section="true" lock-item-weights="false" in-objcomp-summ-
display="true" in-objcomp-summ-overall-rating="true" auto-pop-weights="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="popup" show-calculated-section-rating="true" avoid-obj-plan-
state-change-by-multiple-forms="false" use-mlt-rating-if-present="false">
  <obj-sect-name msgKey="PM_GoalSection_name"><![CDATA[Goals]]></obj-sect-name>
  <obj-sect-intro msgKey="PM_GoalSection_intro"></obj-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 msgKey="PM_GoalSection_defaultrating"><![CDATA[Select a
rating...]]></default-rating>
    <unrated-rating msgKey="PM_GoalSection_unrated"><![CDATA[Unable to Rate]]></
unrated-rating>
    <weight-total><![CDATA[100.0]]></weight-total>
    <hidden-strength-threshold>0.0</hidden-strength-threshold>
    <blind-spot-threshold>0.0</blind-spot-threshold>
    <item-weights>
      <item-weight-floor>0.0</item-weight-floor>
      <item-weight-ceiling>100.0</item-weight-ceiling>
    </item-weights>
    <section-comments-label msgKey="PM_GoalSection_sectcomment"><![CDATA[Overall
Section Comments]]></section-comments-label>
    <section-manager-comments-label msgKey="PM_GoalSection_sectmgrcomment"><!
[CDATA[{0}'''s Comments]]></section-manager-comments-label>
    <section-subject-comments-label msgKey="PM_GoalSection_sectsubjcomment"><!
[CDATA[{0}'''s Comments]]></section-subject-comments-label>
    <manager-comments-label msgKey="PM_GoalSection_mgrcomment"><![CDATA[{0}'''s
Comments]]></manager-comments-label>
    <subject-comments-label msgKey="PM_GoalSection_subjcomment"><![CDATA[{0}'''s
Comments]]></subject-comments-label>
    <weight-total-option><![CDATA[enforce]]></weight-total-option>
    <num-decimal-places>2</num-decimal-places>
    <publish-button-label><![CDATA[Publish Content]]></publish-button-label>
  </fm-sect-config>
  <others-ratingtab-item-permission type="none">
    <role-name>*</role-name>
    <tab-item refid="item-rating"/>
    <route-step stepid="1"/>
  </others-ratingtab-item-permission>
  <sect-weight>50.0</sect-weight>
  <sect-weight-4-objcomp-summary>50.0</sect-weight-4-objcomp-summary>
  <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>
  <obj-sect-type autosync="true"><![CDATA[plan]]></obj-sect-type>
  <obj-sect-plan-id>10</obj-sect-plan-id>
  <meta-grp-label><![CDATA[Group]]></meta-grp-label>
</objective-sect>
```

6.14.3 XML Example: Section Permissions

Learn about section permission examples in an XML form template.

Example 1

In this example, managers and employees can edit the section in all steps while other roles can only view the section in all steps.

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

Example 2

In this example, nobody can view the section in a specific step. You can look for the step ID in a route map.

```
<section-permission type="hidden">
    <role-name>*</role-name>
    <route-step stepid="7"/>
</section-permission>
```

6.14.4 XML Example: Action Permissions

Learn about action permission examples in an XML form template.

Example 1

In this example, employees are not allowed to add or remove goals in any steps.

```
<action-permission type="none">
    <role-name>E</role-name>
    <action refid="add-item" />
    <action refid="remove-item" />
    <route-step stepid="*"/>
</action-permission>
```

Example 2

In this example, nobody can add or remove goals while managers can do so.

```
<action-permission type="none">
    <role-name>*</role-name>
    <action refid="add-item"/>
    <action refid="remove-item"/>
</action-permission>
<action-permission type="enabled">
    <role-name>EM</role-name>
    <action refid="add-item"/>
    <action refid="remove-item"/>
</action-permission>
```

6.14.5 XML Example: Field Permissions

Learn about action permission examples in an XML form template.

Example 1

In this example, everyone can at least view the Item Rating, Item Weight, and Item Group fields, managers can edit the Item Rating and Item Weight fields, and employees can edit the Item Group and Item Weight fields.

```
<field-permission type="read">
    <role-name>*</role-name>
    <field refid="item-rating"/>
    <field refid="item-weight"/>
    <field refid="item-group"/>
</field-permission>
<field-permission type="write">
    <role-name>EM</role-name>
    <field refid="item-rating"/>
    <field refid="item-weight"/>
</field-permission>
<field-permission type="write">
    <role-name>E</role-name>
    <field refid="item-group"/>
    <field refid="item-weight"/>
</field-permission>
```

Example 2

In this example, employees can edit a specific custom field in all steps and everyone can view another custom field in a specific step.

```
<field-permission type="write">
    <role-name>E</role-name>
    <ekey>target3</ekey>
```

```
    <route-step stepid="*"/>
</field-permission>
<field-permission type="read">
    <role-name>*</role-name>
    <ekey>Results_obj</ekey>
    <route-step stepid="set_goals"/>
</field-permission>
```

7 Enabling Form Features

Performance Management forms have many features that can improve user experience in performance reviews. Learn about the features in detail and how to enable them.

In competency sections, users can view the last competency rating, which is the most recent rating that employees have received for a competency.

Legal Scan [page 219]

The Legal Scan tool checks for any improper or discriminatory language in the comment fields of a form.

Out of Turn Access [page 220]

Out of Turn Access (OOTA) allows users to access a copy of forms from Team Overview before the forms officially reach them.

Spell Check [page 223]

The Spell Check tool helps make sure words entered as comments in a form are correctly spelled.

Stack Ranker [page 225]

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.

Step Exit Reminder [page 229]

When users send the form to the next step, a reminder message pops up and they can decide whether they want to review the form or move it forward.

Team Overview [page 230]

Team Overview is used by managers to organize and conduct their team's performance reviews. It also provides a one-stop status summary of the performance review of all their reports.

Writing Assistant [page 233]

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

Rating Calculation [page 235]

Provides information on rating calculations used in Performance Forms.

7.1 Add Modifier

The Add Modifier feature allows performance reviewers to include other users into the form review process at the Modify stage.

After the users are added to the form, they will appear in the Route Map section on the form and be recorded in the Audit Trail page. They will receive the form in their Inbox when the form is sent to the next step. They can provide ratings and comments on the form, or access the form in Team Overview. After their review is done, they can send the form forward to the next step without having to send it back to the user who added them to the route map. When the form is completed, they will get a copy of the form in the Completed folder.

7.1.1 Enabling Add Modifier

Configure your form template so that users can add modifiers on the form.

Procedure

1. In Admin Center, go to *Form Template Settings* and open a form template.
2. Select *Allow Add Approver/Evaluator*.
3. Choose *Update Form Template*.

   Add Modifier is available to all users under the *Actions* dropdown in the Route Map section and at the bottom of the form. It applies to the forms that have been already launched as well.
4. Optional: Define the `add-modifier` permission to control user access to the button.

   > → 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.

Related Information

Form Permissions in XML Template [page 164]

7.2 Add Signer and Remove Signer

Users can add and remove signers as necessary in a performance review.

When users do a performance review, if they want to let other users sign on the form, they can add those users as signers. They can also remove them at the current step. When the form is routed to another step, if they want to remove the signers that they added, they can open the copy of the form in the En Route folder and remove them.

Add Signer

When users add a signer at the Modify stage, the signer is added before the existing signers. The added signer is the first one to sign the form. When users add a signer at the Signature stage, the signer is added after the current signer. When the current signer routes the form to the next step, the added signer is the next one to sign the form.

Remove Signer

When users remove signers, they can only remove the signers that were added by them. If they remove signers who have received the form in their Inbox, the form is automatically routed to the next step. In the case when the form has only one signer, we recommend that add the right signer before removing the wrong signer. So, the form is not auto-completed when the only signer is removed.

Additionally, if signers have received the form in their Inbox and later are removed, admins can enable an email notification to inform those signers. The email notification used is Removing Current Signer Notification. For more information, see Configuring e-mail Notifications and E-mail Notifications in Performance Management.

Exceptional Cases

When users have added a signer to sign the form at different steps, if the form hasn't routed to the signer, removing the signer will remove all the steps related to the signer. If the form has routed to the signer, users can choose to remove the signer in the current step, remove the signer in other steps except the current step, or both.

When users remove a signer who owns the current step of the form and add a new signer, if the form is rejected at the Signature stage, the form is routed back to the last step at the Modify stage. In the meantime, the route map at the Signature stage doesn't refresh with the latest change. The previously removed signer appears again in the route map.

Related Information

Email Notifications [page 201]
Configuring e-mail Notifications

7.2.1 Enabling Add Signer and Remove Signer

Configure your form template so that users can add and remove signers on the form.

Procedure

1. In Admin Center, go to *Form Template Settings* and open a form template.
2. Deselect *Hide Add/Remove Signer buttons*.
3. Choose when to display the buttons.
    - *Option 1 - Allow adding/removing signers only during the Modification stage*
    - *Option 2 - Allow adding/removing signers during both the Modification and Signature stages*

4. Choose *Update Form Template*.

   Add Signer and *Remove Signer* are available to all users. It applies to the forms that have been already launched as well.
5. Optional: Define the `add-signer` permission to control user access to the buttons.

> → 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.

Results

When the form is currently with users, they can choose the buttons:

- In the *Actions* dropdown menu in the Route Map section
- In the *Actions* dropdown menu in the top right of the form
- At the bottom of the form

When the form is routed to another step, they can choose the buttons in the *Actions* dropdown menu in the top right of the form.

Related Information

Form Permissions in XML Template [page 164]

7.3 Add to Outlook

With Outlook calendar integration, users can add a performance review to their Outlook calendar for personal reminders.

When they choose *Add to Outlook*, an Outlook meeting request is generated. It contains form title, form link, and form due date. Users can send the meeting request to themselves and later the calendar will remind them to do the performance review.

You can find the feature at two places:

- In the Action column in form Inbox, as an icon *(Add to Outlook)*
- In the *Actions* dropdown in the top-right corner of the form, as a button

7.3.1 Enabling Add to Outlook

Configure your system to allow users to add performance review reminders to Outlook calendar.

Prerequisites

Your company is using the latest version of Outlook for Office, Office 2010, 2007, and 2003 Outlook calendars.

Procedure

1. In *Admin Center*, go to *Company System and Logo Settings*.
2. Select *Outlook Calendar Integration*.
3. Choose *Save Company System Setting*.

7.4 Ask for Feedback

The Ask for Feedback feature is an integrated approach to solicit feedback from people through email. Managers can send an email to one or more individuals asking for feedback, and the individuals can reply directly to the email with their feedback.

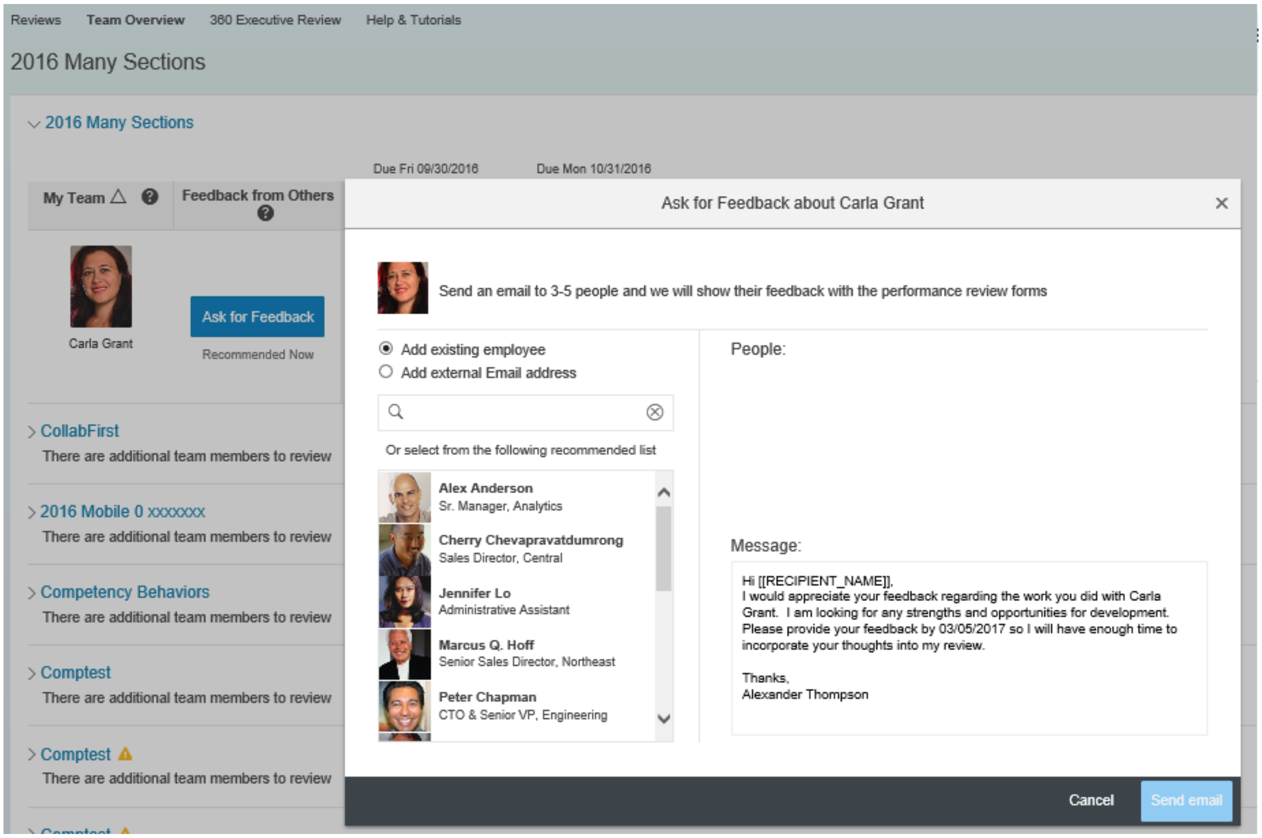
Context

Effective and timely feedback is key to a successful performance review. If effective feedback is given to employees on their progress towards their goals, employees are more likely to improve their performance. A multiperspective set of feedback allows managers to provide a more balanced review that considers other people's points of view.

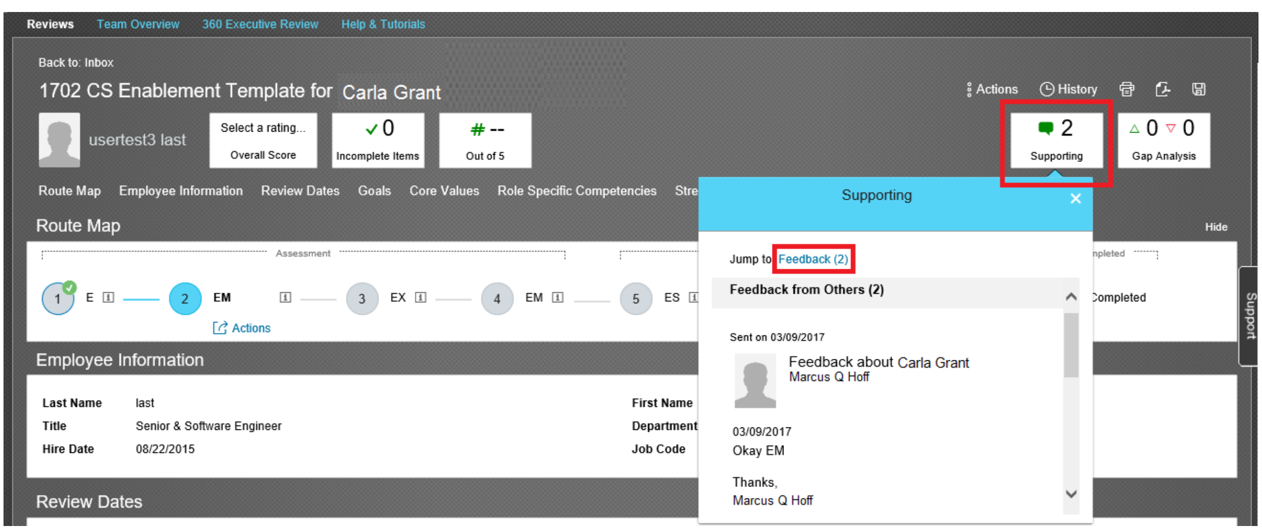
Feedback can come from many different sources: managers, supervisors, peers, and customers, just to name a few. This feature allows people from outside the organization, who can't be added to a route map, to provide feedback about an employee's performance.

Use

Managers can choose *Ask for Feedback* in *Team Overview* to select people and draft the email body for requesting feedback, as shown in the following screenshot. They can ask the same person for feedback at multiple times, as long as they send request emails on different days. When managers send a request email, they are cc'ed automatically.



After individuals give feedback by replying to the email, the feedback will appear in the Supporting Information pod on the form, as shown in the following screenshot.



Messages Explained

In the *Feedback from Others* column in *Team Overview*, managers can see different messages under different circumstances. The following table shows all the messages, when they appear, and whether they coexist with the *Ask for Feedback* button.

Message	When Shown	If Shown with Ask for Feedback
Recommended Later	Before the date range for collecting feedback	Yes
Recommended Now	Within the date range for collecting feedback	Yes
You have requested feedback about {employee's first name} from {n} people	The manager has asked for feedback about the employee from one or multiple people.	No
You chose not to request feedback about {employee's first name}	• The end date for collecting feedback is past; and • The manager hasn't asked for feedback.	No
	• The modify stage is over; and • The manager hasn't asked for feedback.	No

For more information about setting the date range for collecting feedback, refer to Configuring Ask for Feedback.

Related Information

Configuring Ask for Feedback [page 178]

7.4.1 Configuring Ask for Feedback

For managers to use Ask for Feedback, you need to set a date range in a form template for them to send request emails.

Prerequisites

Disable Ask For Feedback functionality in *Form Template Settings* is not selected.

Procedure

1. In Admin Center, go to *Form Template Settings* and open a form template.
2. Under *Date range for collecting feedback from employees*, set a fixed or relative start date and end date to define the period during which managers can request and people can respond with feedback.

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

Example

You can set the start date as 10 days after the form creation date and the end date as form due date.

3. Optional: Select *Disable the external email address feedback option* to ask for feedback from internal employees only.

   If you select this option, *Add external Email address* will not be available in the *Ask for Feedback about {employee name}* popup window.
4. Choose *Update Form Template*.

7.4.2 Allowing Other Roles to View Feedback

By default, only the managers who have asked for feedback can view the feedback in the Supporting Information pod on the form. You can allow other roles who have access to the form to view the feedback as well.

Context

The option to allow all roles to view feedback applies to new, in-progress, and completed forms. If you want to further configure permissions for different roles, we recommend that you launch forms after configuration to apply the permissions in new forms.

Procedure

1. In Admin Center, go to *Form Template Settings* and open a form template.
2. Select *Enable Ask for Feedback Responses in Supporting Pod permissions* and choose *Update Form Template*.

   If this option is selected, all roles in the route map of the form can view the feedback.
3. To configure permissions for different roles in different steps, go to *Manage Templates* > *General Settings* and choose *0 Ask for Feedback data in Supporting Information Pod Permission(s) defined. Click to modify*.

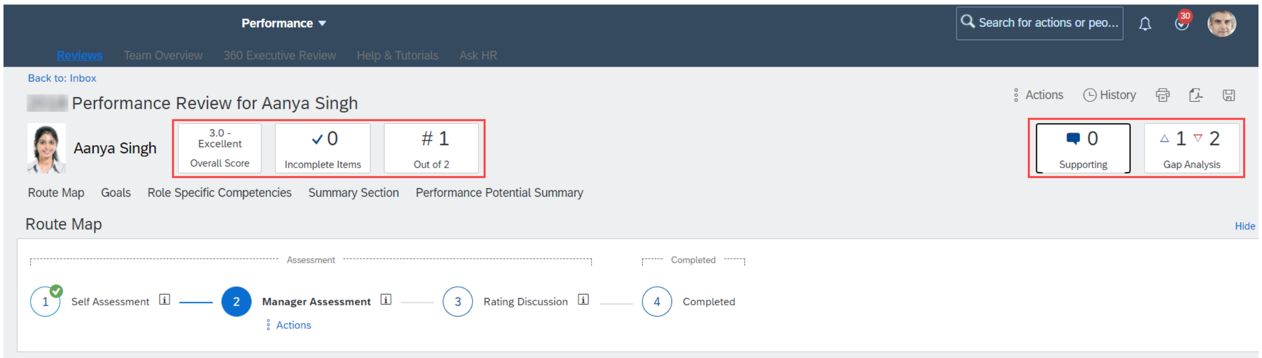
   The *Ask for Feedback data in Supporting Information Pod Permission(s)* popup window appears.
4. Select the permission type, roles, and route steps accordingly.

   You can grant the *None* permission to all roles in all steps first and grant the *Read* permmission to some roles in specific steps.
5. Choose *Done* and save the template.

7.5 Available Pods

Performance Management provides users with various summary pods on forms.

The pods are shown at the top of the form, right beside the employee photo and name. From left to right in the screenshot below are the Overall Score, Incomplete Items, Team Ranker, Supporting Information, and Gap Analysis pods.



i Note

The Team Ranker and Gap Analysis pods are for manager view only.

You can configure the permission for pods by configuring button permissions. For more information, see the topics about configuring form permissions.

Overall Score Pod [page 181]
: The Overall Score pod displays the overall score of the ratings in the current performance review step. By choosing the pod, users can view the detailed ratings of each section.

Incomplete Items Pod [page 181]
: The Incomplete Items pod displays the number of incomplete items that users need to finish in the current performance review step.

Team Ranker Pod [page 182]
: The Team Ranker pod displays the ranking of an employee among their peers based on the overall form rating. By choosing the pod, managers can view the full ranking list including the overall form rating of each direct report.

Supporting Information Pod [page 182]
: The Supporting Information pod displays the number of feedback, notes, and attachments.

Gap Analysis Pod [page 183]
: The Gap Analysis Pod displays the number of items that have rating gaps between employees and managers. By choosing the pod, managers can view individual items where such gaps exist.

Related Information

Configuring Form Permissions [page 75]

7.5.1 Overall Score Pod

The Overall Score pod displays the overall score of the ratings in the current performance review step. By choosing the pod, users can view the detailed ratings of each section.

In the Modify stage, the pod is available to the current user when the following configurations are met:

- The form has the summary section.
- All sections that have ratings are displayed in the summary section.
- The user has one of the following rating permissions in all sections in the current step:
  - Item rating (item-rating), also known as official rating
  - Unofficial user rating (item-cmt-rating)
  - Subject rating (subject-item-rating)
  - Item rating and unofficial user rating

The overall score is the calculated or manual overall rating based on users' rating permissions in the current step. See the following table for details.

Rating Permissions	Overall Score
Item rating	Calculated overall official rating
Unofficial user rating	Calculated overall unofficial rating
Subject rating	Calculated overall subject rating
Item rating and unofficial user rating	Calculated overall official rating

> **Note**
>
> If other than the above permissions, users have the permission to give a manual rating in the summary section, the overall score is the manual rating.

In the Signature stage, if the user is granted with the permission to view the Overall Score pod, they can view the overall official rating of the form. By choosing the pod, they can view the official rating of each item.

7.5.2 Incomplete Items Pod

The Incomplete Items pod displays the number of incomplete items that users need to finish in the current performance review step.

Before users send the form to the next step, the following required fields, if configured, are counted by this pod.

- Item comment
- Item rating
- Item weight
- Section comment
- Section weight
- Manual rating

7.5.3 Team Ranker Pod

The Team Ranker pod displays the ranking of an employee among their peers based on the overall form rating. By choosing the pod, managers can view the full ranking list including the overall form rating of each direct report.

The overall form rating of other direct reports is from the latest Performance Management form based on the same form template.

To show all direct reports who have the in-progress form in the pod, make sure that *Start of Review* is selected in a route map step.

Related Information

Creating a Route Map [page 26]

7.5.4 Supporting Information Pod

The Supporting Information pod displays the number of feedback, notes, and attachments.

- Feedback: Users can view the feedback about the form subject provided through the Ask for Feedback feature. For more information, refer to Ask for Feedback.
- Notes: Users can view the notes retrieved from the Notes block in People Profile. Notes are displayed with a maximum count limit of 1000, and there's no filter on date range.
  Employees for whom notes are created can view the notes only in their People Profile. Managers who create notes for their employees can view the notes in this pod on employees' form.
- Attachments: Users can upload attachments to forms and download and delete attachments from forms. Deleted attachments aren't accessible from the deleted section of the *Manage Documents* admin tool, because they've been physically removed from the system.
  You can configure permissions to manage attachments. For more information, refer to Configuring Permissions for Attachments.

Related Information

Ask for Feedback [page 176]
Configuring Permissions for Attachments [page 101]

7.5.5 Gap Analysis Pod

The Gap Analysis Pod displays the number of items that have rating gaps between employees and managers. By choosing the pod, managers can view individual items where such gaps exist.

To use this pod, make sure that there's a self-assessment step in the route map.

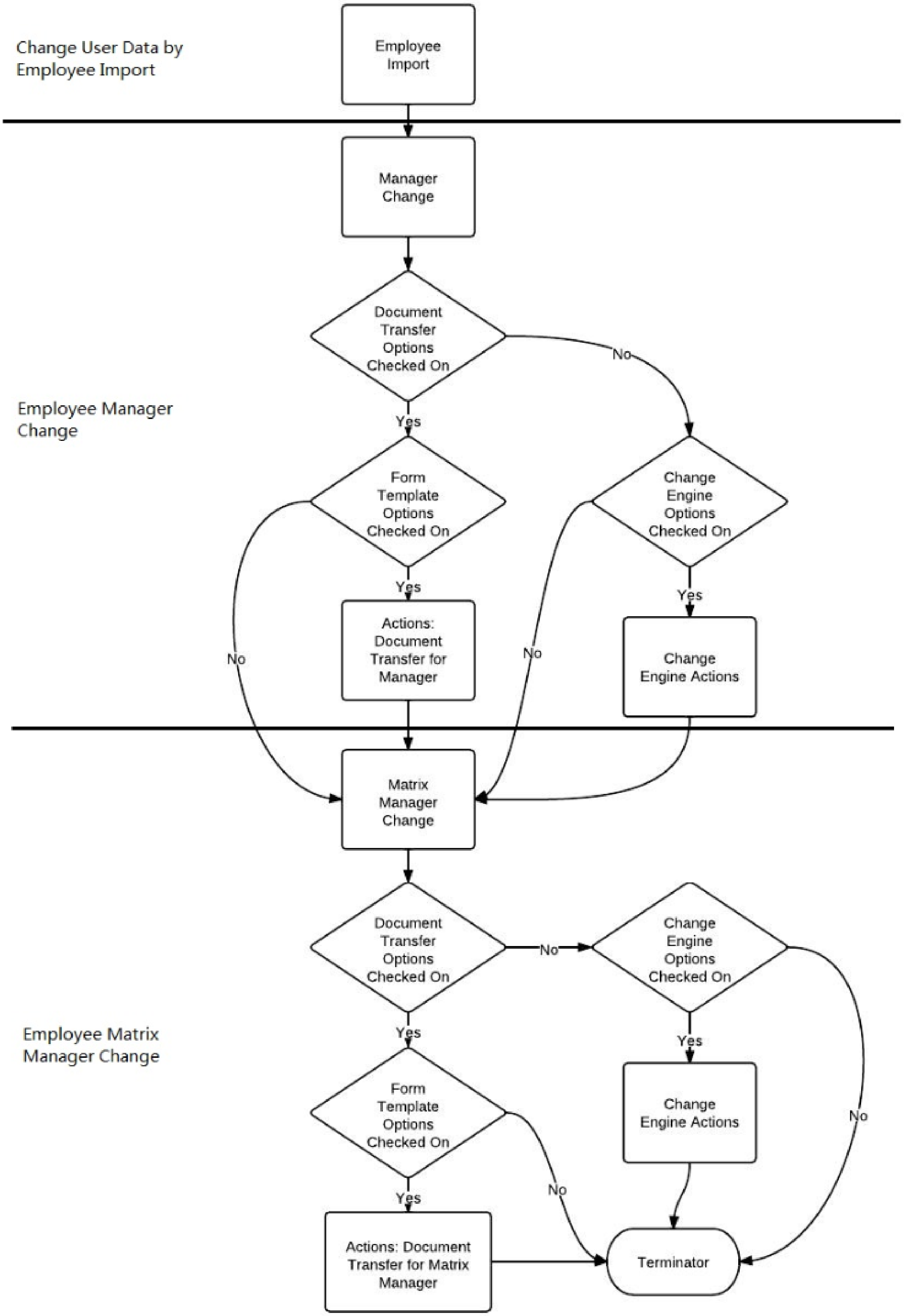
7.6 Change Engine

Change engine is used to define rules for document changes and transfer when the employee data is changed. Settings are maintained for each change event and are applicable to the entire system.

Change engine allows you to set up rules that will trigger actions based on employee data changes, but the feature is more often used to keep forms at the old manager's side. For example, when employee's manager is changed, the old manager can provide final ratings and comments and move the form directly to completion.

Relationship Between Document Transfer and Change Engine

Document transfer and change engine are parallel functions, which means when one is working, the other will be inactive. The following flowchart illustrates how they work in cases of employee import.


Change User Data by Employee Import
Employee Import
Manager Change
Document Transfer Options Checked On
No
Yes
Employee Manager Change
Form Template Options Checked On
Change Engine Options Checked On
Yes
No
Actions: Document Transfer for Manager
No
Yes
Change Engine Actions
Matrix Manager Change
Document Transfer Options Checked On
No
Change Engine Options Checked On
Yes
Employee Matrix Manager Change
Yes
Form Template Options Checked On
Change Engine Actions
No
No
Yes
Actions: Document Transfer for Matrix Manager
Terminator

7.6.1 Configuring Change Engine Rules

Configure change engine rules, so that when the manager, matrix manager, or HR of employees is changed, change engine will trigger actions for form changes.

Prerequisites

- *Enable document transfer for Matrix Manager change* and *Enable document transfer for HR Manager change* are selected in the *Cross Talent Feature Settings* admin tool.
- *Do Not Trigger Change Engine* is not selected in *Form Template Settings*.
- All settings are disabled in the *Automatic Manager Transfer* admin tool.
- The permission of *Change Engine Configuration* under *Administrator Permissions* > *Manage System Properties* in *Manage Permission Roles* is granted.

Procedure

1. In Admin Center, go to *Configure Change Engine*.
2. In the left panel called *Rules*, choose *Manager Change*.

> **Note**
>
> Manager change refers to direct manager change. For matrix managers and HR representatives, select *Matrix Manager Change* and *HR Rep. Change* respectively.

3. In *Actions*, select the following options that you want to apply when the change occurs.

Option	Description
Auto complete old forms	With this option selected, as soon as there's a change in manager, a new step will be inserted into the route map of the form and owned by the old manager. The following configuration `<freeze-user-to-role><![CDATA[true]]></freeze-user-to-role>` will be automatically added to the route map so that the old manager can keep the form. In the newly added step, the old manager can provide final comments and ratings and then send the form to completion. All future steps will be skipped.
Disable autosync in old forms	Autosync between goal sections in forms and goal plans from Goal Management will be disabled.
Keep forms with old manager	The old manager will keep forms for the ongoing performance review.

Option	Description
	With this option selected, as soon as there's a change in manager, the following configuration <freeze-user-to-role><![CDATA[true]]></freeze-user-to-role> will be automatically added to the route map. This configuration applies to not only the manager, the role for which you're setting the change engine rule, but also all other roles in the future steps. **i Note** Once this option is selected, the *Auto complete old forms* option is not supported.
Send copy of old form to new manager on completion	A copy of completed forms will be sent to the new manager.

In *HR Rep. Change*, you can also configure document transfer options for HR changes.

- Insert New HR Rep. as next document recipient if not already
- Transfer documents in Inbox to new HR Rep
- Transfer documents in En Route to new HR Rep
- Send copy of completed forms to new HR Rep

4. Choose *Save* to save changes without leaving the page.

   If you choose *I'm Done*, all changes are saved and you're back to Admin Center.

7.6.2 Configuring Template-Level Rules for HR Changes

Instead of the system-wide settings of change engine, you can configure document change and transfer rules for HR changes for a specific form template.

Procedure

1. In Admin Center, go to *Form Template Settings* and open a form template.
2. Select *Trigger Change Engine (for HR Rep. change)*.

   Relevant options, grouped under *Document Changes* and *Document Transfer*, become active for this template.
3. Select the following options that you want to apply for the forms based on this template.

   - Auto complete old forms
   - Disable autosync in old forms
   - Keep forms with old HR Rep
   - Send copy of a form to new HR Rep. on completion

- Insert New HR Rep. as next document recipient if not already
- Transfer documents in Inbox to new HR Rep
- Transfer documents in En Route to new HR Rep
- Send copy of completed forms to new HR Rep

4. Choose *Update Form Template*.

Results

When employee's HR is changed, if the forms are based on this form template, document changes and transfer are triggered as configured.

7.7 Document Transfer

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

There are some occasions that require employee's performance forms 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 forms between users.

Document transfer controls forms in the current step only. For example, only when forms are in the Inbox of the old manager at the time of manager change does document transfer take effect. Here are some cases where document transfer is not triggered as expected. For these cases, admins should manually route the form to the next step using *Route Form*.

- If an employee's manager is changed from A to B and document transfer is not enabled yet, manager A keeps the employee's form. Later if the manager is changed from B to C and document transfer is enabled, document transfer is not triggered. This is because the form is not in manager B's form folder.
- If an employee's manager is deleted from the system and a new manager is added, document transfer is not triggered.

To enable document transfer, the first step is to configure the document transfer settings in form templates. Then you need to configure document transfer at the user data level in different tools, for example, user import tool. The form template configuration will override the configuration at the user data level.

7.7.1 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. Therefore, 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.

Setting	Description
	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>

<table>
<tr><th>Setting</th><th>Description</th></tr>
<tr><td></td><td>
<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

ℹ 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>
</td></tr>
<tr><td>Automatic Manager Transfer > Automatic insertion of new manager as next document recipient if not already</td><td>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.

ℹ 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,

</td></tr>
</table>

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.

7.7.2 Triggering Document Transfer

After configuring the document transfer settings in form templates, you need to work in different tools to trigger document transfer when an employee's manager is changed.

In addition to the following tools, you can also use OData API to update managers and specify document transfer options. For more information, refer to Managing User API Options.

To trigger document transfer for HR manager changes in the system with Employee Central enabled, you can use the following ways:

- Position Change, if cross-entity rules to update HR managers are configured. For more information, refer to Cross-Entity Rules.
- Employee Data Import
- `EmpJobRelationships` OData API
- Job Relationship block in People Profile

> **Note**
>
> In the system with or without Employee Central enabled, document transfer isn't triggered when you update HR managers through `User` OData API or the Basic User Information block in People Profile.

User Import Tools [page 193]
You can use *Employee Import*, *Manage Users*, HRIS Sync, and more to import or update users and set up document transfer options.

Transferring Forms to New Manager [page 196]
You can use *Transfer Forms to New Manager* to manually transfer in-progress, en-route, and a copy of completed forms to the new manager after an employee's manager change.

Configuring Document Transfer for Changing Managers in People Profile [page 197]
If your system doesn't have Employee Central enabled, and you change employee's manager or matrix manager in People Profile, you can use *Automatic Manager Transfer* to set up central rules for document transfer.

7.7.2.1 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.

7.7.2.2 Transferring Forms to New Manager

You can use *Transfer Forms to New Manager* to manually transfer in-progress, en-route, and a copy of completed forms to the new manager after an employee's manager change.

Context

You can transfer the forms of only one employee at a time.

Procedure

1. In Admin Center, go to *Transfer Forms to New Manager*.

   The *Documents Transfer* page opens.
2. Enter the username of employee whose forms need to be transferred in the *Transfer Employee* field.

   The *Transfer From Manager* field will be populated automatically. If not, enter the username of the employee's old manager.
3. Enter the username of the new manager in the *Transfer To Manager* field, and select *Yes* in *Update Employee's Manager Field* to update the employee's manager.

   > **Note**
   >
   > If you select *No*, manager will not be updated even though document transfer is triggered.
4. Select appropriate options for document transfer.

Option	Description
Automatic insertion of new manager as next document recipient if not already	The new manager will become a part of the review process and the old manager will be removed from any accountability going forward. **Note** This option is not supported for Performance Management forms.

Option	Description
Automatic Inbox Document Transfer to New Manager	All the forms in the old manager's Inbox will be sent to the new manager's Inbox.
Automatic En Route Document Transfer To New Manager	All the forms in the old manager's En Route folder will be sent to the new manager's En Route folder.
Automatic Completed Document Copy to New Manager	A copy of forms in the old manager's Completed folder will be sent to the new manager's Completed folder.
Automatic Process Owner Change To New Manager For In-Progress Documents When Old Manager is Process Owner (Only for 360)	The process owner of in-progress 360 Reviews forms will be changed from the old manger to the new manager.
Automatic Process Owner Change To New Manager For Completed Documents When Old Manager is Process Owner (Only for 360)	The process owner of completed 360 Reviews forms will be changed from the old manger to the new manager.

5. Choose *Transfer Employee's Document* to trigger document transfer as configured.

7.7.2.3 Configuring Document Transfer for Changing Managers in People Profile

If your system doesn't have Employee Central enabled, and you change employee's manager or matrix manager in People Profile, you can use *Automatic Manager Transfer* to set up central rules for document transfer.

Procedure

1. In Admin Center, go to *Automatic Manager Transfer*.
2. Select the appropriate options for document transfer.

Option	Description
Automatic Completed Document Copy to New Manager	All the forms in the old manager's Completed folder will be moved to the new manager's Completed folder.
Automatic En Route Document Transfer To New Manager	All the forms in the old manager's En Route folder will be moved to the new manager's En Route folder.
Automatic Inbox Document Transfer To New Manager	All the forms in the old manager's Inbox will be moved to the new manager's Inbox.
Automatic insertion of new manager as next document recipient if not already	The new manager will become a part of the review process and the old manager will be removed from any accountability going forward.

3. Choose *Save* to save changes.

Results

When employee's manager or matrix manager is updated in People Profile, document transfer is triggered as configured.

7.7.3 Document Transfer for Matrix Managers

When document transfer is triggered for matrix managers, forms are transferred to the primary matrix manager of employees.

System Without Employee Central

In the system that doesn't enable Employee Central, the first matrix manager that appears in the *Employee Import* or *Manage Users* admin tool is identified as the primary matrix manager.

- If the primary matrix manager is changed, forms are transferred to the new primary matrix manager.
- If a non-primary matrix manager is changed or removed, or a new matrix manager is added, the primary matrix manager keeps or receives forms.
- If the order of non-primary matrix managers is changed, or all matrix managers are removed, no document transfer happens. The matrix manager who has received forms before the change keeps the forms.

You can also update employees' matrix managers using the related block in the People Profile. However, if employees have more than one matrix manager, when you update the EP role in the block, document transfer may not work as expected, so we do not recommend that you update the EP role using the block in the People Profile.

System with Employee Central Enabled

In the system that enables Employee Central, currently, the primary matrix manager can't be identified. If employees have more than one matrix manager, when you update the EP or EX role in the route map step where the role reviews forms, document transfer is not supported. We recommend that you avoid changing matrix managers in the step where the EP or EX role is assigned to review forms.

7.7.4 Example: Transferring Inbox Forms When Manager Changed

This example describes how to transfer Performance Management forms from the old manager's Inbox to the new manager's Inbox when employees' manager is changed.

Context

You have launched forms for employees within a department to evaluate their last year's performance. The forms have been sent to their manager's Inbox and displayed in To-Do and Team Overview. A personnel change occurs and the manager of the department is changed, and therefore, the forms in the old manager's Inbox need to be transferred to the new manager's Inbox.

Procedures

Here is how you should configure the document transfer options to meet your needs:

1. Select *Automatic Inbox Document Transfer To New Manager* in *Form Template Settings*.
2. Launch forms and route the forms to the manager's Inbox.
3. Update the manager in the *Employee Import* admin tool. Make sure that *Automatic Inbox Document Transfer To New Manager* is selected in the *Import Users* page.
   You can also use other tools to update the manager. For more information, refer to User Import Tools [page 193].

Results

- When the new manager logs in to the system, the forms appear in their Inbox, To-Do, and Team Overview. On choosing ⓘ *(Information)*, they find their name displayed in the Routing Map section of the form information page.
- When the old manager logs in to the system, the forms are in their En Route folder instead of Inbox.

7.7.5 Enabling Automatic Fixing of Document Transfer and Change Engine Issues Caused by RBP Refresh Failures

Enable the feature so that the Document Transfer and Change Engine issues caused by RBP refresh failures are automatically fixed on a daily basis.

Prerequisites

You have the *Administrator Permissions* > *Manage System Properties* > *Performance Management Feature Settings* permission.

Context

RBP refresh failures block form transfers. With a daily backend check and fix, the blocked processes resume automatically. You no longer need to manually run the check *No document transfer job requests are blocked due to an RBP refresh failure* and quick fix issues in *Check Tool*.

> **Note**
>
> When this feature is enabled for the first time, if you've also enabled *Document Routing Notification* or *Employee Transfer Notification*, users may receive a large number of email notifications about previously blocked forms that aren't relevant to them any more.
>
> To avoid such case, we recommend that you use *Check Tool* to check the number of issues before enabling this feature. You can temporarily disable the email notifications, and then enable this feature.

Procedure

1. Go to *Admin Center* > *Performance Management Feature Settings*.
2. Select *Automatically Fix Document Transfer and Change Engine Issues*.
3. Save your change.

Related Information

Configuring E-Mail Notifications

7.8 Email Notifications

You can enable email notifications so that users will receive emails when specific actions occur.

The following table lists email notifications used in Performance Management.

Type	Description	Special Tokens in Addition to Common Ones
Disabled User Notification	An email notification will be sent when a user is deactivated and there are forms to be completed in their form Inbox. Recipients: The person who initiates the data upload that deactivates the user	
Document Creation Notification	An email notification will be sent when a form is created. Recipients: The first step owner in the route map **Note** • If the form sender and the form recipient are the same person, this email notification will not be triggered. • Make sure that when you launch forms, you also select *Send email notifications to form recipients* in *Launch Forms*.	• [[DOC_ID]]: Form's ID • [[DOC_ACCESS_DECLINE]]: Used to decline to access the form • [[DOC_ACCESS_ACCEPT]]: Used to accept to access the form • [[EXTERNAL]]: Used to check whether the participant is internal or external • [[DOC_ACCESS_URL]]: The URL to access the form • [[DOC_ACTION]]: The action that the email recipient needs to do

Type	Description	Special Tokens in Addition to Common Ones
Document Routing Notification	An email notification will be sent when a form reaches a user's form Inbox. Recipients: The user who receives the form in their form Inbox	• [[DOC_ID]]: Form's ID • [[DOC_ACCESS_DECLINE]]: Used to decline to access the form • [[DOC_ACCESS_ACCEPT]]: Used to accept to access the form • [[EXTERNAL]]: Used to check whether the participant is internal or external • [[DOC_ACCESS_URL]]: The URL to access the form • [[DOC_ACTION]]: The action that the email recipient needs to do
Document Reject Notification	An email notification will be sent when a form is rejected in the Signature stage. Recipients: The step owner of the previous step	• [[DOC_ID]]: Form's ID • [[DOC_ACCESS_DECLINE]]: Used to decline to access the form • [[DOC_ACCESS_ACCEPT]]: Used to accept to access the form • [[EXTERNAL]]: Used to check whether the participant is internal or external • [[DOC_ACCESS_URL]]: The URL to access the form • [[DOC_ACTION]]: The action that the email recipient needs to do
Document Completed Notification	An email notification will be sent when a form is completed. Recipients: Any users that you select in the *Recipients* field	• [[DOC_ACCESS_URL]]: The URL to access the form

Type	Description	Special Tokens in Addition to Common Ones
Document Forward Notification	An email notification will be sent when a completed form is forwarded to a user's Completed folder. Recipients: The user who receives the copy of the form	• [[DOC_ID]]: Form's ID • [[DOC_ACCESS_DECLINE]]: Used to decline to access the form • [[DOC_ACCESS_ACCEPT]]: Used to accept to access the form • [[EXTERNAL]]: Used to check whether the participant is internal or external • [[DOC_ACCESS_URL]]: The URL to access the form • [[DOC_ACTION]]: The action that the email recipient needs to do
Removing Current Signer Notification	An email notification will be sent when the current signer is removed from a form. Recipients: The removed signer **Note** It works only when the signer is removed from the form. Removing signers in the *Modify Form Route Map* admin tool doesn't trigger the email notification.	

Type	Description	Special Tokens in Addition to Common Ones
Document Routing Step Exit Notification	An email notification will be sent when a form step is completed. Recipients: Any users that you select in the *Recipients* field You can select one of the following options for Document Routing Notification or Document Completed Notification: • Step Exit Notification Only • Document Notification Only • Both Step Exit and Document Notifications	• [[TO_STEP_DESC]]: Current step's description • [[FROM_STEP_DESC]]: Last step's description
Document Deletion Notification	An email notification will be sent when a form is deleted. Recipients: Any users that you select in the *Recipients* field	
Mass Create Form Instance Notification	An email notification will be sent when forms are mass created. Recipients: The user who requests mass form creation **Note** This email notification does not support common email tokens.	• [[PM_MASSCREATE_FORM_NAME]]: Form title • [[PM_MASSCREATE_JOB_ID]]: Job ID • [[PM_MASSCREATE_USER_NUMBER]]: The number of all form subjects • [[PM_MASSCREATE_USER_LIST]]: The list of form subjects • [[PM_MASSCREATE_DATE]]: The execution date of the job

Type	Description	Special Tokens in Addition to Common Ones
Document Due Notification	An email notification will be sent when the form due date is scheduled several days later. Recipients: The current step owner **i Note** The number of days at which this notification is triggered can be set in *Form Template Settings*.	• [[DOC_ID]]: Form's ID • [[DOC_ACCESS_URL]]: The URL to access the form • [[RECIPIENT_USER_ID]]: Recipient's ID
Document Late Notification	An email notification will be sent when the form due date has already passed. Recipients: The current step owner **i Note** The number of days at which this notification is triggered can be set in *Form Template Settings*.	• [[DOC_ID]]: Form's ID • [[DOC_ACCESS_URL]]: The URL to access the form • [[RECIPIENT_USER_ID]]: Recipient's ID
Step Due Notification	An email notification will be sent when the step due date is scheduled several days later. Recipients: The current step owner	• [[DOC_ID]]: Form's ID • [[DOC_ACCESS_URL]]: The URL to access the form • [[RECIPIENT_USER_ID]]: Recipient's ID • [[STEP_NAME]]: Step name • [[EXTERNAL]]: Used to check whether the participant is internal or external

Type	Description	Special Tokens in Addition to Common Ones
Step Over Due Notification	An email notification will be sent when the step due date has already passed. Recipients: The current step owner	• [[DOC_ID]]: Form's ID • [[DOC_ACCESS_URL]]: The URL to access the form • [[RECIPIENT_USER_ID]]: Recipient's ID • [[STEP_NAME]]: Step name • [[EXTERNAL]]: Used to check whether the participant is internal or external
Request Feedback Notification	An email notification will be sent when a reviewer asks others to provide feedback about an employee. Recipients: Users who are asked to provide feedback	• [[SUBJECT_NAME]]: Name of the form subject • [[FEEDBACK_DUE_ON]]: Due date of the feedback
Performance Evaluation Kick-off Manager Notification	Not supported	
Feedback Request Reminder Notification	Not supported	
Performance Review Process Update for Manager	Not supported	

Common Tokens for Email Notifications

In the email body, tokens are used to populate data from forms into the email text. The following table lists common tokens used in Performance Management.

Token	Definition
[[SIGNATURE]]	Signature
[[DOC_TITLE]]	Form title
[[SENDER]]	Form sender
[[DOC_DUE_DATE]]	Form due date
[[REVIEW_END_ON]]	Form end date

Token	Definition
[[IS_WAS_DUE_ON]]	The token is used in two email notifications: • For Step Due Notification, it refers to the step due date in a route map. The format is MM/DD/YYYY. • For Document Due Notification, it refers to the form due date. The format is MM/DD/YYYY.
[[IS_WAS_DUE_ON_LONG]]	See the definition above. The example of the date format is November 20, 2018.
[[DOC_COMMENT]]	Comment from sender **Note** • If this token is not configured in the email body, users can't see the *Email Notification Comments* box when sending the form to the next step. • If the form sender and the form recipient are the same person, though this token is configured in the email body, users can't see the *Email Notification Comments* box when sending the form to the next step. • The comments generated by the system, for example, "Skipped on behalf of {user}", can't be translated.
[[NO_OF_DAYS]]	The number of days between the current date and due date
[[EMP_NAME]]	Subject's full name
[[EMP_USER_ID]]	Subject's ID
[[EMP_PASSWORD]]	Subject's password
[[RECIPIENT_USERNAME]]	Recipient's username
[[RECIPIENT_NAME]]	Recipient's full name
[[COMPANY_NAME]]	Company name
[[DOC_COMPLETION_DATE]]	Date of form completion
[[DOC_LASTMODIFIED_DATE]]	Last modified date of the form

Related Information

Configuring E-Mail Notifications

7.8.1 Customizing Email Notification Settings for Form Templates

You can customize email notification settings for one or more form templates, including enablement, consolidated email notifications, and additional recipients.

Context

You can customize the settings of the following email notifications.

- Document Creation Notification
- Document Routing Notification
- Document Reject Notification
- Document Completed Notification
- Document Forward Notification
- Document Deletion Notification

Procedure

1. In Admin Center, go to *E-Mail Notification Templates Settings*.
2. Select an email notification on the left of the page.

   All available settings appear on the right of the page.
3. Choose *Customize Settings for Form Templates*.

   The *Customize Settings for Form Templates* dialog box appears.
4. In the dialog box, set up the following options for one or more form templates.
   a. To enable the email notification, select the checkbox in the *Enabled* column.
   b. To set up a consolidated email notification, select the checkbox and choose an interval in the *Consolidated & Interval* column, and make sure the scheduled job *Process Batched Emails* is 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.

      For example, if you choose 24 hours as the interval for Document Routing Notification for a form template, every 24 hours users will be notified of all the forms based on this form template that have been routed in the last 24 hours.

      For information on consolidated email notifications, refer to Understanding Consolidated e-mail Notifications.
   c. To allow users other than initial recipients to receive email notifications, select roles in the *Additional Recipients* column.

For initial recipients of a specific email notification, refer to Email Notifications.

5. Choose *Close* when you're done.

Related Information

Email Notifications [page 201]
Understanding Consolidated Email Notifications

7.9 EZ Rater

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

It can be used in goal sections and competency sections. 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.

→ Recommendation

- If you use EZ Rater, we recommend that you use rating option 3. Employee self-ratings and manager ratings can be shown side by side, and the rating gap will be shown in the gap analysis chart.
  If you use other rating options, only official ratings are shown in the collapsed view and the gap analysis chart is unavailable. If users don't have read or write permission for official ratings, no rating is shown in the collapsed view. If users have permission for unofficial ratings, when they expand the view, they can see rating information.
- If you've configured a rating scale with more than one digit, for example, "50: Primarily meets expectations", "100: Meets requirements", and "150: Exceeds requirements", the numbers may overlap in the gap analysis chart. Therefore, we recommend that if you are using the rating scale with more than one digit, do not enable EZ Rater.

i Note

When EZ Rater is enabled, the rating labels of official rating (`item-rating`) are defined differently for the form and the PDF and print version.

- For the form, the label is defined by `FB_UI_SPEED_RATER_OFFICIAL_RATING` (for the employee view), `split_rating_title_format_no_colon` (for the manager view), and `TEXT_BY_USER` in the language package. It's shown as *Rating by {manager name}* for managers and *Official Rating* for employees and other users.
- For the PDF and print version, the label is defined by `<rating-label>` in XML.

To keep the rating labels consistent on the form and in the PDF and print version, make sure that the definitions in the language package and XML are consistent.

7.9.1 Enabling EZ Rater

Enable EZ Rater in an XML form template, so that users can use the feature on the form.

Context

→ 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. In an XML form template, set the `sect-mode` attribute of a goal section or competency section to `EZ-Rater`.
2. Set the `ez-rater-expand-all` attribute to `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.

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

```
<competency-sect index="0" configurable="false" mgt-only="false" use-
jobcode="true"
category-filter-opt="no-filter" no-rate="false" no-weight="true" summ-
opt="99999" split-cmt="false"
rating-opt="3" cmt-opt="2" suppress-item-comments="3" behavior-rating-opt="0"
behavior-cmt-opt="0"
behavior-mode-opt="0" in-summ-display="true" in-overall-rating="true" no-
group="false"
use-behavior="false" if-no-ratings-then-ignore-section="true" lock-item-
weights="false"
in-objcomp-summ-display="false" in-objcomp-summ-overall-rating="false" show-comp-
expected-rating="false"
comp-expected-rating-format="0" show-behavior-expected-rating="false" behavior-
expected-rating-format="0"
behavior-weighted="false" sect-mode="EZ-Rater" ez-rater-expand-all="false"
show-calculated-section-rating="true">
  <comp-sect-name><![CDATA[EZ Rater Comps]]></comp-sect-name>
  <comp-sect-intro><![CDATA[This is an example of using EZ rater.]]></comp-sect-
intro>
  <fm-sect-config>
    <rating-label><![CDATA[Rating]]></rating-label>
    <rating-label-others><![CDATA[Rating]]></rating-label-others>
    <default-rating><![CDATA[unrated]]></default-rating>
    <hidden-strength-threshold>0.0</hidden-strength-threshold>
    <blind-spot-threshold>0.0</blind-spot-threshold>
    <num-decimal-places>2</num-decimal-places>
    <publish-button-label><![CDATA[Publish Content]]></publish-button-label>
  </fm-sect-config>
  <sect-weight>0.0</sect-weight>
  <fm-sect-scale show-value="true">
    <scale-source>1</scale-source>
    <scale-id><![CDATA[2005b]]></scale-id>
    <scale-type><![CDATA[HORIZONTAL_RADIO]]></scale-type>
```

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

3. Optional: To disable the gap analysis chart, add `<ez-rater show-gap="false"/>` under the `<fm-sect-config>` element.
4. Optional: To show manager ratings before employee self-ratings, go to *Admin Center* > *Form Template Settings* and select *Show Manager Rating first for EZ Rater mode*.

7.10 Form Autosave

The system automatically saves Performance Management forms if users don't save the form in a minute.

Additionally, the system triggers form autosave when users leave a form, for example, users choose *Back to: Inbox*, *Team Overview*, *(Go to Home Page)*, or close the tab or browser. Meanwhile, a message is popped up to remind users that they probably lose changes after leaving the form.

Here are two exceptions:

- When users choose buttons on the form, for example, *Actions* > *Info about this form*, the form is automatically saved, but there's no reminder message.
- When users choose *Cancel* on the form, there's no autosave or reminder message. Any changes that have been autosaved won't be canceled.

When a session is going to expire in the system, the session timeout message is popped up to remind users. At that point,

- If the form has any unsaved changes, the form is automatically saved and the session keeps working without the message.
- If the form doesn't have unsaved changes, there's no form autosave and the message is popped up as usual.

> → Recommendation
>
> To make sure that form autosave works properly, don’t use Safari to edit forms.

7.11 Form History

Users can get an overview of form history, including all ratings and comments.

After users open a form, by choosing *History* > *Performance form history* in the top right of the form, they can access all form records of the form subject. In a separate window called *SuccessFactors Business Execution Suite Reviews*, they can specify the form start and due date to search for forms.

The *Document List* section shows completed forms by default. Users can select *Include In-Progress Documents* to search for in-progress forms. By choosing the form title, they can view a copy of the form in the section below.

> **Note**
>
> If you want to disable user access to form history, select *Disable Form button* in *Form Template Settings*.

7.12 Form Information

Users can know the basic information about a form, step status, current step owner and more on the Form Information page.

They can access the page in the following ways:

- In form Inbox, choose ⓘ in the *Action* column.
- In forms, choose *Info about this form* in the *Actions* dropdown.

> **Note**
>
> If you want to disable the access to the page, select *Disable Info button* in *Admin Center* > *Form Template Settings*.

Form Information shows three main sections:

- Route Map, which is the same as the one shown in the form
- Properties, including form originator, subject, due date, and document ID
- Approval Chain, including:
  - Routing Map, a table listing the type, stage, employee, name, and status of all the steps of the form
  - Audit Trail [page 212]

7.12.1 Audit Trail

Audit trail is shown as a table in the Form Information page. It records the changes that users made to a form in different steps and highlights the user to whom the form has currently been routed.

Entries in the audit trail are only created when a form moves from one step to the next, for example from step 1 to step 2. They won't be created if the step is an iterative or collaboration step where the involved employees are only moving the form back and forth between themselves.

Audit trail shows the following information.

Currently With

The *Currently With* column shows » *(arrow)* to indicate the current step of a form.

Employee

The *Employee* column shows the step owner of the form.

Status

The *Status* column shows the step status, including *Not Started*, *In Progress*, and *Completed*.

Act By

The *Act By* column shows the step completed date.

Comments in Audit Trail

The *Comments* column shows the system comments and the email notification comments entered by the sender when they send the form to the next step. Users can only view the comments they've sent and the comments sent to them.

If you don't want the comments to be stored and displayed in the audit trail, select *Do not store sender's comment on workflow action* in *Admin Center* > *Company System and Logo Settings*.

Action in Audit Trail

The *Action* column shows the changes that users made to a form. Changes of a step may be clickable and users can choose them to view a read-only snapshot of the form as it was in that step. To achieve this, you need to select the following options in *Admin Center* > *Company System and Logo Settings*:

- *Everyone can access the revision history of the document*
- *Manager can access the revision history of the document*

> **Note**
>
> - Even though neither of these options is selected, users who have updated the form in a step can always see a link to that step.
> - If users don't have permissions to a step, they can't view that step.
> - There's no link for the Create action.

The following table lists the actions on the form and corresponding values in the audit trail.

Action on Form	Action Value in Audit Trail
Create a form	Create
Route a form or mass route forms	Modify
Get feedback for comments	Ask For Comment
Provide comments to give feedback	Reply Comment
Get feedback for ratings and comments	Ask For Edit
Provide ratings and comments to give feedback	Reply Edit
Withdraw a request to give feedback	Recall Feedback
Move a form to another step on behalf of a user in *Route Form*	Manual Modify
Skip a form from a step in *Route Form*	Skip
Route a form automatically on the step due date	Auto Modify
Document transfer at the Modify stage	Auto Modify
Reject to sign a form	Reject

Action on Form	Action Value in Audit Trail
Delete a form	Deleted
Restore a form	Restored
Remove form visibility	Hide
Restore form visibility	Restore Visibility
Send a copy of a completed form	Send A Copy
Sign a form	Sign
Sign a form in *Sign Form*	Manual Sign
Move a form from a signature step to another step on behalf of a user in *Route Form*	Manual Sign
Skip a form from a signature step in *Route Form*	Skip
Route a form automatically on the due date of a signature step	Auto Sign
Document transfer at the Signature stage	Auto Sign

7.13 Get Feedback

With Get Feedback, performance reviewers can send an entire form to someone outside the route map to collect both ratings and comments, or comments only.

After the form is sent to a specified participant, the form will appear in their form Inbox. Their comments are not anonymous, and their name will be shown on the form as well.

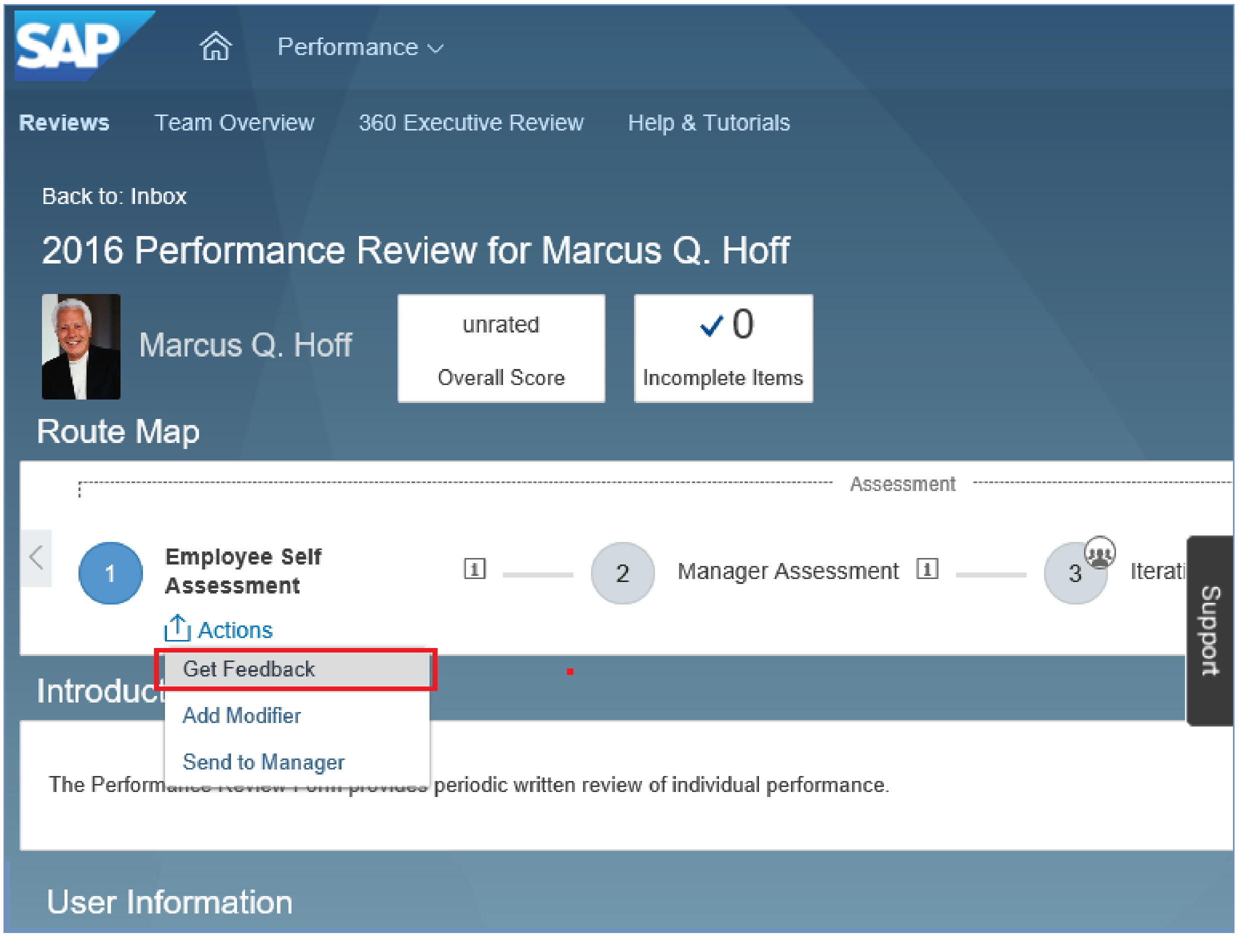
The following table compares Get Feedback and Ask for Feedback.

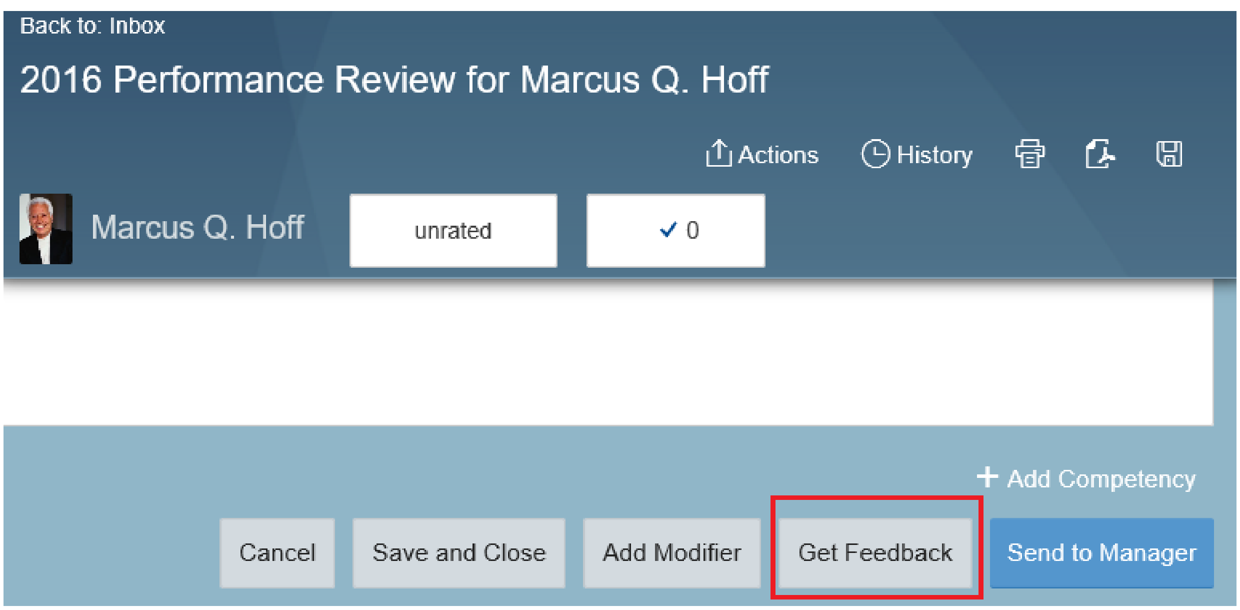
Features Compared	Get Feedback	Ask for Feedback
What is being sent?	The actual form	An email request
How many people can you send a request to at one time?	One individual	Up to 30 people
How do participants provide feedback?	Directly on the form	By replying to the email

> **Note**
>
> Get Feedback is not available in collaboration steps.

Use

The *Get Feedback* button appears under the *Actions* dropdown in the Route Map section and at the bottom of the form, as shown below. When you choose the button, you can search for the participant and select the type of feedback that you want them to give.





After you send the form to the participant, you can find the form in your En Route folder. If necessary, you can withdraw the request to give feedback by choosing *Recall Feedback* on the form.

7.13.1 Enabling Get Feedback

Configure your form template so that users can use Get Feedback on the form.

Context

The configuration applies to new and in-progress forms.

Procedure

1. In Admin Center, go to *Form Template Settings* and open a form template.
2. Deselect *Disable Ask For Comment Routing* or *Disable Ask For Edit Routing*, or both.

Option	Description
Disable Ask For Comment Routing	Users can ask others to give comments only.
Disable Ask For Edit Routing	Users can ask others to give ratings and comments. ℹ Note If the form template uses Rating Option 3, which allows only the employee and their manager to give ratings, people who're invited to give feedback can give comments only.

3. Choose *Update Form Template*.

7.14 Last Competency Rating

In competency sections, users can view the last competency rating, which is the most recent rating that employees have received for a competency.

Based on your configuration, the last competency rating is from either of the following:

- **Forms based on a specific form template**: If a form includes the same competency as in the current form, after the form is completed, the competency rating will be shown in the *Last Rating* tab of the competency in the current form. Users can also open the *Previous Form* link to view the completed form in detail.

> ℹ Note
>
> - In in-progress forms, the last competency rating is populated from the latest completed form. In completed forms, the rating is no longer updated.
> - If rating by behavior is enabled, the last competency rating will be the calculated competency rating. Users can open the previous form to see detailed behavior ratings.

- The display type of the last competency rating follows that in the current form. It only supports star ratings and circle ratings.
- The rating scale should be consistent in the current form and the completed form. Otherwise, the last competency rating is shown as unrated.

- **Rating sources in Job Profile Builder**: The rating sources include official ratings from Performance Management forms and ratings from self-assessment forms used in Career Development Planning. For more information on self-assessment forms, refer to Enabling Self-Assessment for Role Readiness.
  The most recent rating of a competency stored in the selected rating sources, along with the rating date and source, is shown in the *Last Rating* tab of the competency.

  > **i Note**
  >
  > The rating date is when the source form was completed.

  The last competency rating can also be prepopulated to rating fields, including official and unofficial ones. Users can then modify the rating as necessary. If a form has multiple reviewers, only the first reviewer sees the prepopulated rating. If the reviewer gives "Too New to Rate" or no rating for a competency, each time they open the form before sending it to the next step, the last competency rating is prepopulated.

  > **i Note**
  >
  > - If the last competency rating after rating normalization doesn't match a value in the rating field, it's mapped to the closest value when being prepopulated to the field.
  > - The rating will be updated according to the latest records in rating sources, so it may change from time to time during the performance review process.
  > - If a competency was rated in the last performance review as "Too New to Rate" or any other label defined in the form template, it's considered as the last competency rating.
  > - If a competency was unrated in the last performance review, the most recent rating of the competency is considered as the last competency rating.
  > - If the rating scale of the last competency rating is different from that of the current form, the rating will get normalized.
  > - When users add competencies to the form during review, they don't see the last competency rating immediately. To see the rating, they should save and close the form and reopen it.

By default, all users can view the last competency rating, if available, in the *Last Rating* tab. You can configure tab permissions to enable or disable the access. For more information, refer to Tab Permissions.

Related Information

Enabling Self-Assessment for Role Readiness
Tab Permissions [page 79]

7.14.1 Selecting a Form Template for Last Competency Rating

Configure form template settings to display the last competency rating from forms based on a specific form template.

Procedure

1. In Admin Center, go to *Form Template Settings*.
2. Select *From a Form Template* under *Display Last Competency Ratings*.
3. Select a form template from the dropdown list.
4. Choose *Update Form Template*.

7.14.2 Selecting Rating Sources for Last Competency Rating

Configure form template settings to display the last competency rating from rating sources in Job Profile Builder.

Prerequisites

- Job Profile Builder is enabled in your instance.
- There are forms completed after Q4 2019.

Procedure

1. In Admin Center, go to *Form Template Settings*.
2. Select *From Rating Sources* under *Display Last Competency Ratings*.
3. Select one or two of the following rating sources.
    - Performance Management Form Review
    - Career Development Planning Review
4. Choose whether to prepopulate the last competency rating.
5. Choose *Update Form Template*.

7.15 Legal Scan

The Legal Scan tool checks for any improper or discriminatory language in the comment fields of a form.

Legal Scan examines comments and highlights potentially improper words in red. When users choose the highlighted words, Legal Scan displays suggested actions or alternative terminology. It doesn't replace the highlighted words, but alerts users to alternatives. Users can choose to change the existing words based on the suggestions.

Users can scan the entire form at once or scan a specific field of the form.

- To scan the entire form at once, choose *Actions* in the top right of the form and select *Legal Scan the entire form*.
- To scan a specific field, choose 🏛 *(Run Legal Scan on the text you input here)* in the toolbar of the field.

7.15.1 Enabling Legal Scan

To use Legal Scan, you need to enable the feature both in Provisioning and a form template.

Prerequisites

You have access to 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. In Provisioning, select a company and go to *Company Settings*.
2. Select *Legal Scan* and choose *Save Feature*.
3. In Admin Center, go to *Form Template Settings* and open a form template.
4. Select *Enable Legal Scan*.
5. Optional: To disable legal scan to work when forms proceed along the steps, select *Disable Legal Scan on Route*.
6. Choose *Update Form Template*.

7.15.2 Maintaining Legal Scan Library

You can add or update individual terms in *Legal Scan Library*.

Context

SAP SuccessFactors provides you with a basic Legal Scan library that contains common controversial terms. You can use the library as is, or add other terms that your company deems controversial.

Procedure

1. In Admin Center, go to *Legal Scan Library*.
2. Select a locale, enter a controversial term in *Your Text*, and choose *Search*.
3. Follow one of the following actions:
    - If the term exists in the library, modify the suggested term in *Suggestions* and choose *Save entire form*.
    - If the term doesn't exist in the library, enter a suggested term in *Suggestions* and choose *Save entire form*.

Next Steps

If you have multiple terms, you can upload a file that contains all your terms using *Legal Scan Library Import*.

7.16 Out of Turn Access

Out of Turn Access (OOTA) allows users to access a copy of forms from Team Overview before the forms officially reach them.

You can enable OOTA only for the steps that follow the starting step of the form review. For example, the form review starts with the Self Assessment step, and therefore, OOTA can be enabled for the steps following the Self Assessment step.

To use OOTA, users can go to Team Overview and choose *Review {employee}* under their step. They will be directed to an open form where they can give ratings and comments. When the form is routed to their step, they can review the ratings and comments they've left before.

Managers can also use Stack Ranker with OOTA enabled. All competency ratings and comments given by them in Stack Ranker are saved. To allow using Stack Ranker with OOTA enabled, make sure that the `use-behavior` attribute in the competency section in an XML form template is set to `false`.

→ 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.

Please note the following before you choose to use OOTA.

- If a route map includes two steps for the same role, for example, manager, even though both steps are enabled with OOTA, managers can use OOTA only in the first step. However, we do not recommend that you enable OOTA for the step whose role is also involved in another step in the route map.
- If the current step is an iterative or collaboration step and involves the role - for example, manager - who is granted with OOTA permission in a future step, managers can't use OOTA for now. When the form is routed to the next step in which managers are not involved, they can then use OOTA.
- If a step with OOTA enabled is skipped because the form is routed one step forward or back, the ratings and comments provided using OOTA will still appear on the form.

Limitations

- OOTA is not supported for iterative or collaboration steps.
- When users use OOTA, the following actions are not supported.
  - Add or remove goals or competencies.
  - Edit item weights or section weights.
  - Edit custom sections or custom fields of goals or competencies.
  - Use Print or Save as PDF.
- In the following scenario, due to OOTA behaviors, EMM may not see the correct ratings provided by EM on the *Ratings from Others* tab.
  If both EM and EMM roles are granted with OOTA permission in their specific step, after EMM sends the form back to EM to update ratings, EMM will not see the updated ratings.

7.16.1 Document Transfer with Out of Turn Access

During document transfer, the ratings and comments provided by the old manager are only available when the new manager views the form in the employee's Inbox. They will get deleted once the form is routed to the new manager's Inbox.

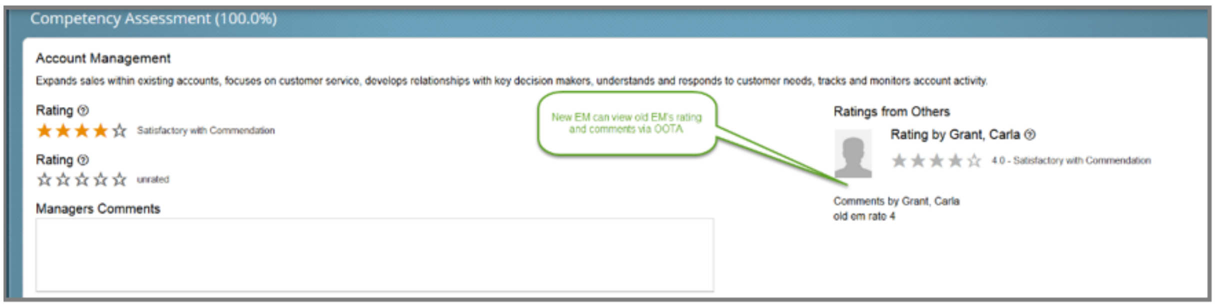
Learn about the following basic cases.

- **Case 1: When an employee's manager is changed**
  Steps in the route map: E (current) → (Old EM (OOTA) → New EM (OOTA))
  After document transfer, the old EM can't view the form in Team Overview, but the new EM can, as shown below.

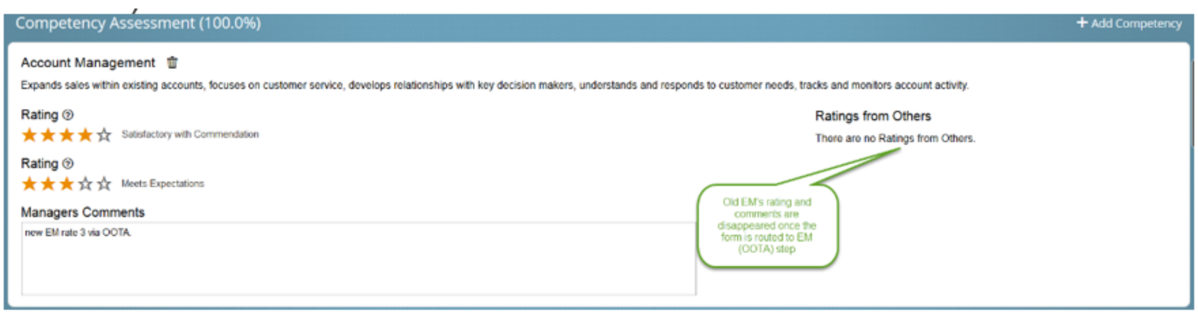
  i Note

  Since the form is in the E step, though the old EM has given ratings using OOTA, the rating is displayed as *unrated*.

After choosing *Review {employee}*, the new EM can see the old EM's ratings and comments on the *Ratings from Others* tab, as shown below.



When the form is routed to the new EM, that is, in the EM (OOTA) step, the ratings and comments provided by the old EM get deleted, as shown below.



> **i Note**
>
> If a route map includes two EM steps with OOTA enabled for the first EM step but not for the second EM step, and a manager change takes place in the first EM step, the old EM's ratings and comments are not saved. If a manager change takes place in the second EM step, the old EM's ratings and comments are saved.

- **Case 2: When an employee's manager is removed**
  Steps in the route map: E (current) → (Old EM (OOTA) → No manager) → E Signature
  The ratings and comments given by the old EM will get deleted after document transfer. When the form is in the E step, the old EM can view the form in Team Overview, but *Review {employee}* is not available. After the form is routed to the E Signature step, the old EM can still view the form in Team Overview, but with the following text: *The system could not find a user in this role or the step is skipped.*
- **Case 3: When an employee's manager is added**
  Steps in the route map: E (current) → (No manager → EM (OOTA)) → E Signature
  After the EM is added, the new EM can view the form in Team Overview and choose *Review {employee}* to access the form.

> **Note**
>
> The rules above apply both to manager changes and matrix manager changes.

7.16.2 Granting Out of Turn Access Permission

To allow users to use the Out of Turn Access (OOTA) feature, you need to configure the route map of forms to grant the permission to them.

Prerequisites

- The *Start of Review* option is enabled in a step that precedes the step for which you want to enable OOTA.
- The permission of *Team Overview Access* under *Performance* in *Manage Permission Roles* is granted to the users.

Procedure

1. In Admin Center, go to *Manage Route maps* and select a route map.
2. In the Modify stage, choose the step for which you want to enable OOTA.
3. Choose *Show advanced options* and select *Out of Turn Access*.
4. Choose *Save*.

Results

After you launch forms that use this route map, users who have a role involved in the step can use OOTA.

7.17 Spell Check

The Spell Check tool helps make sure words entered as comments in a form are correctly spelled.

Users can check the spelling for the entire form at once or for a specific field of the form.

- To check the spelling for the entire form at once, choose *Actions* in the top right of the form and select *Spell Check the entire form*.
- To check the spelling for a specific field, choose A-Z *(Run spell check on the text you input here)* in the toolbar of the field.

! Restriction

Spell Check doesn't work for other areas of the form, such as goal titles and descriptions. The goal fields are not editable in the form. Users can use the *Edit Goal* dialog box to edit goals and then use Spell Check to flag words that are not spelled correctly.

7.17.1 Enabling Spell Check

To use Spell Check, you need to enable the feature both in Provisioning and a form template.

Prerequisites

You have access to 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. In Provisioning, select a company and go to *Company Settings*.
2. Select *Spell Check* and choose *Save Feature*.
3. In Admin Center, go to *Form Template Settings* and open a form template.
4. Select *Enable Spell Check*.
5. Optional: To disable spell check to work when forms proceed along the steps, select *Disable Spell Check on Route*.
6. Choose *Update Form Template*.

7.17.2 Maintaining Company Dictionary

You can maintain a company dictionary that is used in Spell Check.

Procedure

1. In Admin Center, go to *Company Dictionary*.

The *Manage Company Dictionary* page opens.

2. Update words in the company dictionary by either of the following ways.
    - Add or remove individual words.
    - Import a word list file where words are separated by newlines.
    - Download the company dictionary, edit the dictionary offline, and upload it again.

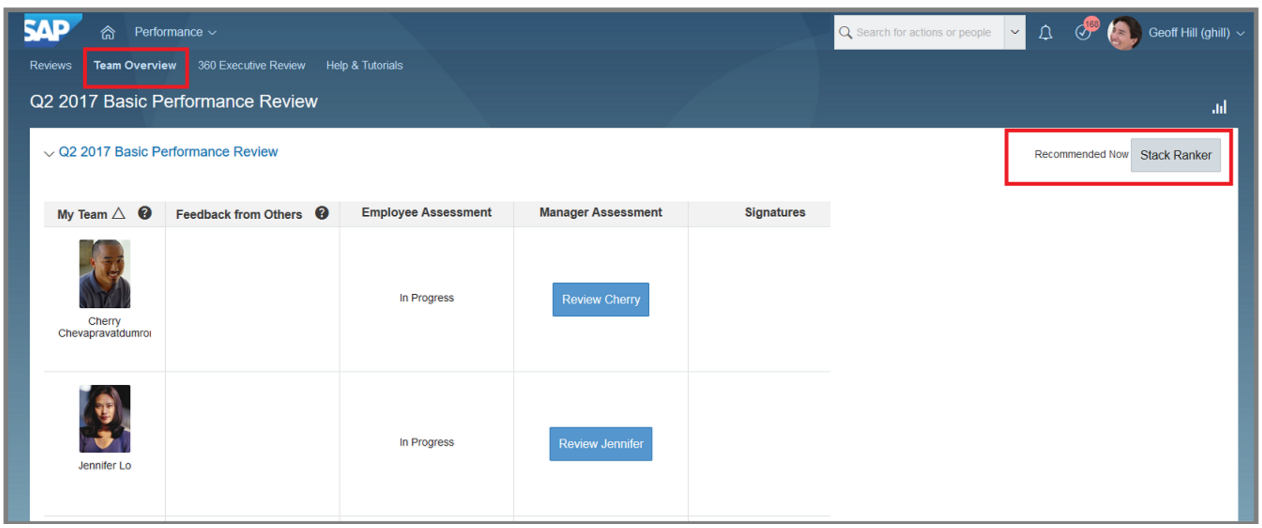
7.18 Stack Ranker

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.

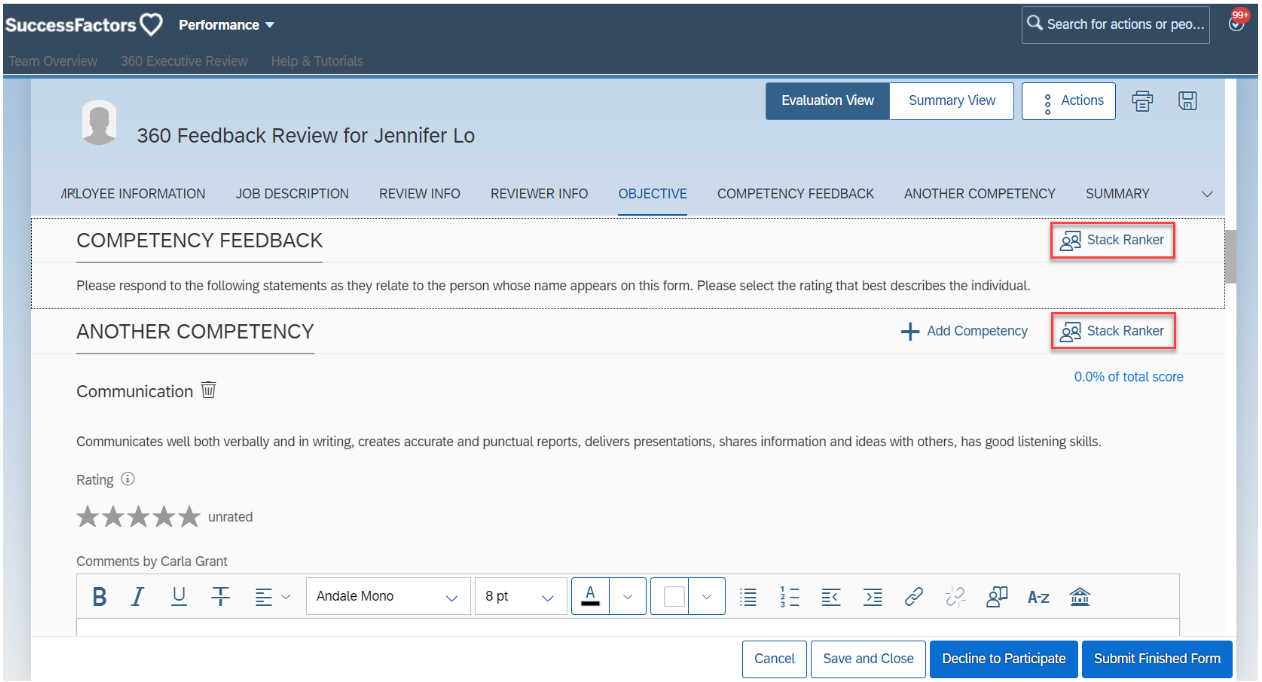
If direct reports have in-progress forms based on the same form template, managers can review their competency ratings at one time and quickly identify top and low performers.

Accessing Stack Ranker

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

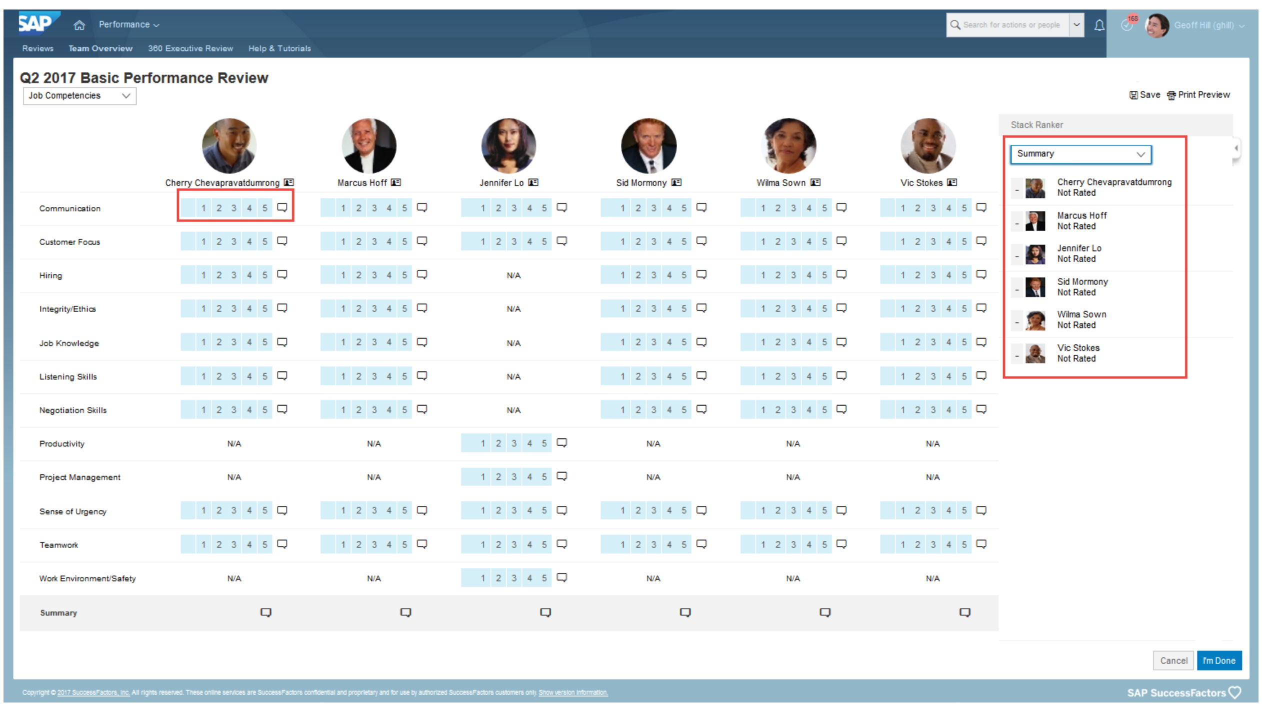


For 360 Reviews forms, managers can access Stack Ranker in the Competency section, as shown below.



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.

7.18.1 Using Stack Ranker: Recommendations and Limitations

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

Recommendations

Route Map

Set up a simple route map with a single modification step for the EM role and no signature step, so that managers get a quick and easy way to stack rank their team. If you configure steps before the EM step, make sure that automatically routing forms on the due date is enabled in the route map, so that managers can receive forms at once.

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.

If you want the overall competency rating to appear on the form, include a goal competency summary section.

Stack Ranker and Calibration Session

If managers use Stack Ranker and Calibration in the same performance review step, ratings provided in Stack Ranker can't be updated in calibration sessions automatically. After managers provide ratings in Stack Ranker, you need to sync data manually by using *Open&Save Documents* in *Form Template Settings*, so that the ratings are updated in calibration sessions. Nevertheless, this is not the recommended way, because the sync job is only done in Provisioning and thus not traceable in Admin Center.

If managers do have to use both Stack Ranker and Calibration in performance reviews, we recommend that you use them in two separate steps. In the manager rating step, managers do mass ratings using Stack Ranker. After forms are mass routed to the calibration step, ratings provided in the previous step are updated in calibration sessions. Disable Stack Ranker in the calibration step to not allow managers to adjust ratings in this step.

Team Rank Pod and Reporting

To sync ratings in the Team Rank pod and reporting, you need to go to *Form Template Settings*, open the form template that the performance review is using, and choose *Open&Save Documents*.

Limitations

There are a few limitations in Stack Ranker.

- If managers are involved in performance reviews with different route maps, or there is a manager 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.
- Collaborative steps are not supported.
- Comments for competency items or sections can't be printed out.

7.18.2 Enabling Stack Ranker for Performance Management

For managers to use Stack Ranker, you need to enable the feature both in an admin tool and a form template.

Prerequisites

The permission of *Performance Management Feature Settings* under *Manage System Properties* is granted.

Procedure

1. In Admin Center, go to *Performance Management Feature Settings* and select *Stack Ranker for Performance Management*.

> **i Note**
>
> As an implementation partner or Product Support, you can choose to select the option in *Company Settings* in Provisioning.

2. Optional: To allow users other than direct managers to access Stack Ranker, for example, matrix managers and second-level managers, select *Stack Ranker for Performance Management- Enable display of all forms but self*.
3. Choose *Save*.
4. Go to *Manage Templates* and open a form template.
5. Choose *General Settings* and select *Allow managers to stack rank employees on competency sections*.
6. Select any of the following options.
    - Select *Globally* to enable Stack Ranker for all competency sections.
    - Select *Section by Section*, and in specific competency sections, select *Allow managers to stack rank employees on this competency section*.
7. Choose *Save*.

    The configuration applies to all in-progress forms based on this form template.

7.18.3 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.

7.19 Step Exit Reminder

When users send the form to the next step, a reminder message pops up and they can decide whether they want to review the form or move it forward.

If users send the form to another user within the same step, the reminder doesn't pop up. For example, users send the form in iterative steps, or they get feedback or recall feedback in the current step.

If you've defined an exit user in collaboration steps, only the exit user receives the reminder. Otherwise, the reminder pops up to all users in collaboration steps when they exit their current step.

7.19.1 Enabling Step Exit Reminder

Configure a route map setting to allow users to receive a reminder in a specific step.

Context

You can enable the feature at the Modify and Signature stages.

Procedure

1. In Admin Center, go to *Manage Route Maps* and select a route map.
2. Choose a step and in its *Step Configurations*, choose *Show advanced options*.
3. Select the *Step Exit Reminder* checkbox.
4. Enter a message in the textbox.

   The rich text format is supported.
5. Choose *Save*.

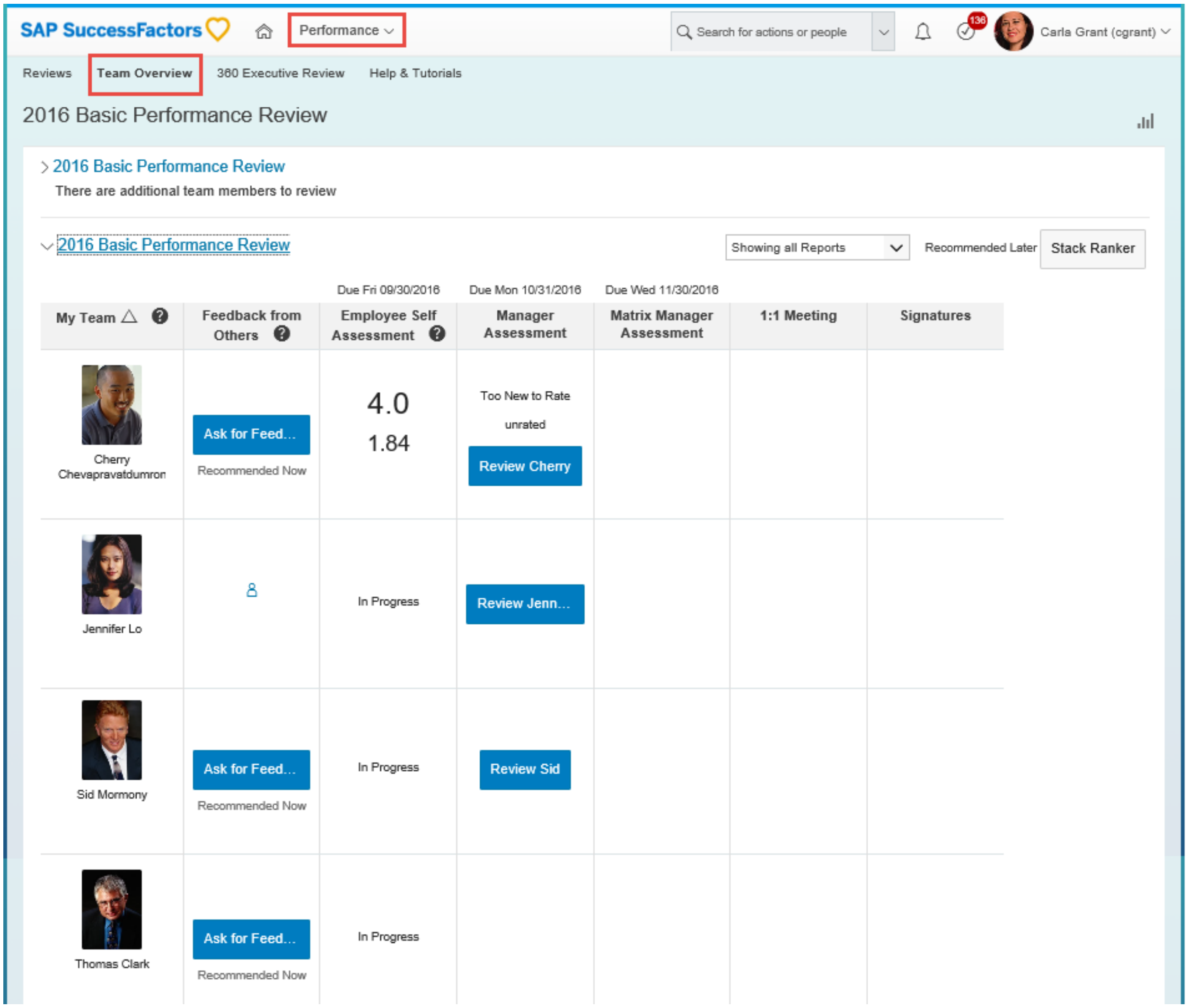
7.20 Team Overview

Team Overview is used by managers to organize and conduct their team's performance reviews. It also provides a one-stop status summary of the performance review of all their reports.

Accessing Team Overview

Managers who have the permission of *Team Overview Access* under *Performance* can access Team Overview. It's a dedicated tab in the Performance module, as shown below. There's no specific permission such as field and section permissions within Team Overview.

> **Note**
>
> Before granting the Team Overview access permission to managers, make sure that *Enable Team Overview Access Permission* is selected in the *Performance Management Feature Settings* admin tool.



Features

As a manager, you'll immediately notice any pending actions on the forms of your reports. Only the forms that have enabled the Start of Review step in the route map are available in Team Overview. For more information, see Creating a Route Map.

You can use the following features in Team Overview.

- You can select a type of reports and focus on the employees for which you want to review the performance summary. The options available for you depend on your role in the performance review. You can choose *Select all* to view the performance summary of all the employees reporting to you.
  - Direct Reports: Shows you the performance summary of your direct reports.
  - Indirect Reports: Shows you the performance summary of your indirect reports.
  - HR Reports: Shows you the performance summary of your HR reports.
  - Matrix Reports: Shows you the performance summary of your matrix reports.

> **i Note**
>
> If you participate in the performance review as a role other than EM, EMM, EH, or EX, for example, EA role, you can't filter the employees of your relevant reports.
>
> Reports you see in Team Overview depend on the route map of forms. If you're a step owner in the route map, but no longer an employee's manager, the employee's form is still available in your Team Overview. On the contrary, if you choose the *My Direct Reports* option in form Inbox, you see the forms of your direct reports based on the current org chart.

- Team Overview shows all the steps of the performance review in one area. In a specific step, you can choose a button to complete the pending action in the step. For example, you can choose *Review {employee name}* to give ratings and comments on the employee's form, choose *Confirm 1:1 Meeting* to confirm that the meeting with employees to discuss performance review results has finished, and choose *Sign* to sign the form.
- Team Overview shows each step's ratings directly on the page. Two kinds of ratings may be available in each step cell: one is the official rating shown as *Rating of Record* and the other is the unofficial rating shown as *User Rating*. If the goal competency summary section or performance potential summary section has been configured, you can hover the mouse over ⚠ in the bottom right of the cell to view ratings.

> **i Note**
>
> If manual rating and scale adjusted calculation have both been enabled for the summary section, Team Overview displays the manual rating rather than the adjusted rating.
>
> If numeric rating values are hidden from the form, note the following cases where Team Overview still shows numeric rating values.
>
> - Manual rating is enabled and calculated rating is an integer or a decimal number.
> - Manual rating is disabled and calculated rating is a decimal number.
> - Manual rating and scale adjusted calculation are both enabled, and calculated rating is a decimal number. In this case, only User Rating is shown as numeric rating values.

> **→ Tip**
>
> If ratings are not wanted, admins can select *Display check mark instead of rating in Team Overview* in *Form Template Settings*.

- You can ask for feedback about employees from other users. For more information, see Ask for Feedback.
- You can stack rank the competency ratings of your direct reports. For more information, see Stack Ranker.

Limitations

- If the form template is changed after forms are launched, Team Overview may not work properly. For example, if some sections are removed from the template, the Team Overview page may keep loading.
- When document transfer is triggered, even though the old manager hasn't rated the employee, the old manager's rating appears in Team Overview.

Related Information

[Ask for Feedback [page 176]](#)
[Stack Ranker [page 225]](#)
[Creating a Route Map [page 26]](#)

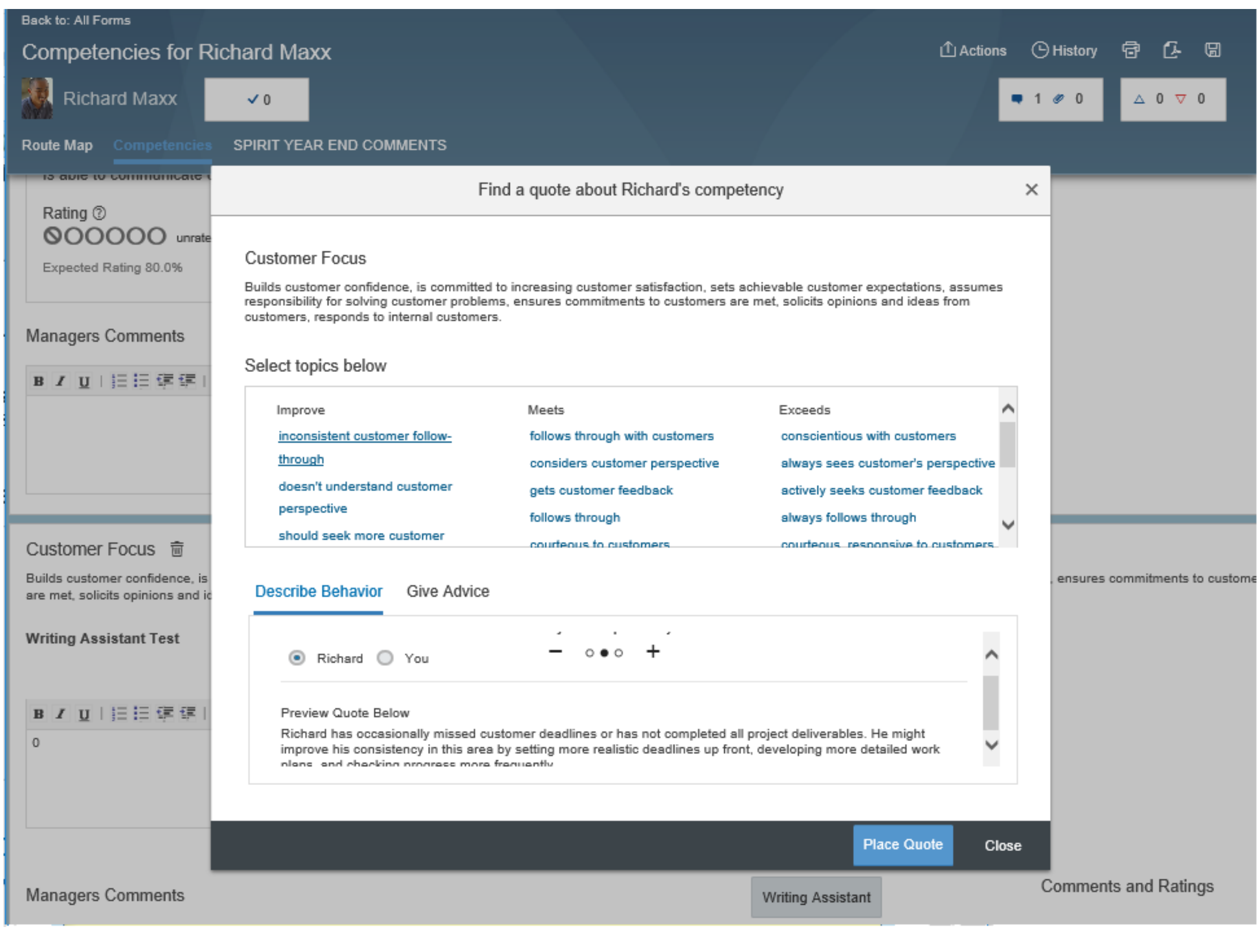
7.21 Writing Assistant

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

Writing Assistant provides complete sentences so that users don't have to type comments on their own. They can add as many sentences as they'd like. Once those sentences are in the form, they can modify them to better match their own writing style, or leave them as they are.

Use

When users choose *Writing Assistant* for a specific competency, a dialog box appears as follows.



They can use Writing Assistant in the following ways.

1. In *Select topics below*, select the level of behavior that best describes the employee's competency.
2. In *Describe Behavior*, select a narrative.
   Writing Assistant supports three narratives:
   - First person: Sentences that often start with I, for example, I am a team player.
   - Second person: Sentences that often start with You, for example, You are a team player.
   - Third person: Sentences that often start with a named person, for example, Richard is a team player.

   The narratives available to a particular user are determined by the user's role. Employees, as the subject of the form, can use the first and third person. Other users, for example managers, can use the second and third person.
   The narrative choices can't be hidden or removed. If users don't wish to provide sentences in a certain narrative, they can ignore that narrative.
3. In *Give Advice*, select the suggestions to support evaluation comments and choose *Place Quote*.
4. Based on the predefined sentences, change the tone of the sentences to make them sound more positive or less positive, to better emphasize one's own perspective.

> **i Note**
>
> To ensure that Writing Assistant works properly, users' first name must be maintained in the system. For more information on managing user information, refer to the Managing User Information Guide.
>
> If Job Profile Builder is used, the Writing Assistant content can be managed in *Manage Writing Assistant and Coaching Advisor*. For more information, refer to Adding Writing Assistant and Coaching Advisor Content from the UI.

Related Information

Field Requirements for the User Data File

7.21.1 Enabling Writing Assistant

To use Writing Assistant, you need to enable the feature both in Provisioning and a form template.

Prerequisites

You have access to 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. In Provisioning, select a company and go to *Company Settings*.
2. Select *Writing Assistant* and choose *Save Feature*.
3. In Admin Center, go to *Form Template Settings* and open a form template.
4. Select *Enable Writing Assistant* and choose *Update Form Template*.

7.22 Rating Calculation

Provides information on rating calculations used in Performance Forms.

Overview

Normally rating calculations are done at:

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

7.22.1 Configuring Rating Scale for Rating Calculation

Provides details for configuring the rating scale in form template.

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

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

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

```
<scale-adjusted-calculation enable="true"  display-calculated-rating="true">
  <scale-map-value>
    <score-min>0.01</score-min>
```

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

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

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

7.22.2 Configuring Weights for Rating Calculation

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

Section Weight

- **Predefined Section Weight**
  <sect-weight>: Section weight can be predefined with element <sect-weight>xx.x</sect-weight>. Once the Performance Form is created, the predefined section weight is shown in Summary section. This element is available for Objective section and Competency section.
  <sect-weight-4-objcomp-summary>: The weight configured in element <sect-weight-4-objcomp-summary> appears in OCOC section. Competency rating calculation and Objective rating calculation are performed based on the weight configured in this element. This element is available for Objective section and Competency section.
- **Related Attributes in <sf-pmreview> of form template**
  weight-lockdown: true if not allowing users to modify section weights if applicable.
  show-weight: true if display section weights if applicable.

Item Weight

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

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

  objective-sect / competency-sect:

  ```
  <weight-total><![CDATA[100.0]]></weight-total>
          <hidden-strength-threshold>0.0</hidden-strength-threshold>
          <blind-spot-threshold>0.0</blind-spot-threshold>
          <item-weights>
            <item-weight-floor>10.0</item-weight-floor>
            <item-weight-ceiling>70.0</item-weight-ceiling>
          </item-weights>
          <weight-total-option><![CDATA[warn]]></weight-total-option>
  ```
- **no-weight and auto-pop-weight**
  no-weight = true
  - User can see Objective weights neither on the PM form nor overall score callout. Objective Section rating is averaged of the rating of all objectives.
  - Objective Weight field in Goal Management has no linking to weight on Performance Management form.
  - ‘auto-pop-weight’ configuration is ignored.

  no-weight = false

  > **Note**
  >
  > If you set `no-weight` as `false` in a section but do not assign any weight to each item, then the overall calculated section rating will be `0`.

  - Objective weights in the PM form are based on the ‘auto-pop-weight’ configuration
  - **IF auto-pop-weight = false**
    - Goals do not use same weights as in the Goal Plan.
    - By default, all Goals in a section have weight 0.
    - User sees the Objective weight in the top right corner of each Objective and can edit the weight if permission settings allow.
    - Changes to Objective weight do not change the ‘Weight’ field of the Objective in Goal Plan.
  - **IF auto-pop-weight = true**
    - Goal weights in the section are same as their weight in the goal plan.
    - User can see Goal weights on the Performance Management form with 'read only' mode.
    - User can update Goal weights in the Goal Plan or on Goal detail dialog using the edit link for Goal item

Competency/Objective Summary Weight

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

objcomp-summary-sect:

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

7.22.3 Configuring Calculation Type for Rating Calculation

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

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

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

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

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

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

  Refer, Calculation Process [page 239] for information about the processes involved in rating calculation.
- Section: `section-rating-calc`: Use this element to select the rating calculation method at the section level.

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

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

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

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

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

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

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

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

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

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

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

7.22.4 Calculation Process

Provides information about the processes involved in rating calculation.

Normalization

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

Steps

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

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

Example

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

Calculation Formula

Average

This is the default calculation type ("avg")

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

Sum

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

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

Friendly

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

friendly = rating1 + rating2 + rating3

Matrix Lookup (OCOC)

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

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

Round of Rating

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

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

7.22.5 Scenarios with Overall Customized Weighted Rating Calculation

The overall customized weighted rating is calculated based on ratings from each role and the weights set for steps and roles in the route map of a Performance Management form. The overall form rating given at each step is part of the form's final score.

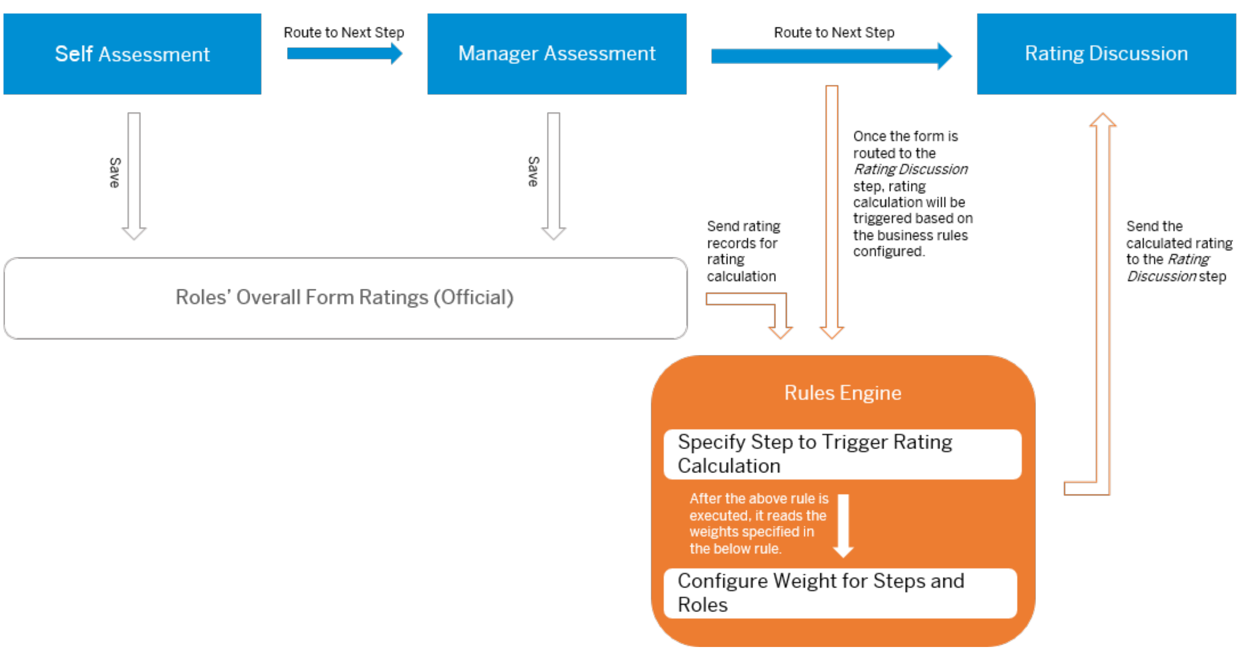
Only the overall form ratings given in the official rating field are included in the calculation of the overall customized weighted rating. Since the employee is assigned to the unofficial rating field in the rating option 3, the rating option 3 isn't recommended to use in the customized weighted rating feature.

If the overall form rating is rated as *Unrated* or *Too New to Rate*, it's ignored in the calculation of the overall customized weighted rating.

> **Note**
>
> If you use the *Route Form* tool to skip the step at which the calculation of the overall customized weighted rating is triggered, the calculation will still be triggered and you can get the calculated rating generated in the next step.

Workflow Diagram

Here is an example of diagram describing what the workflow is like in calculating the overall customized weighted rating:



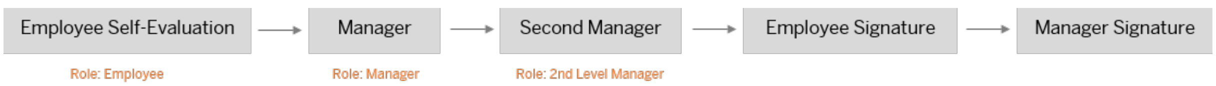
Supported Scenarios

We support the following three scenarios:

> **i Note**
>
> Each scenario defines one or more roles assigned to one or more users in one step. You can use different combinations of the three scenarios in your own route map.

The calculation formula is *(Role A's Rating * Role A's Weight + Role B's Rating * Role B's Weight + ...) / (Role A's Weight + Role B's Weight + ...)*. The total of weights doesn't have to be equal to 1.

- **Scenario A**: One role assigned to one user in one step
  An example of the route map is like this:

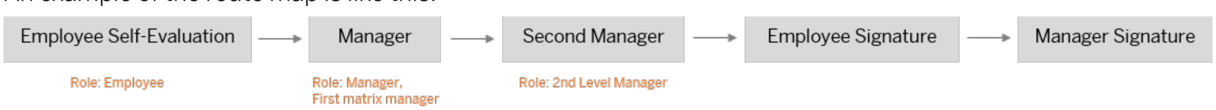


  The ratings and weights for each role are:

Role	Rating (0 - 5)	Weight
Manager	4.00	0.6
2nd Level Manager	3.50	0.4

  The overall form rating is calculated as follows:
  (4.00 * 0.6 + 3.50 * 0.4) / (0.6 + 0.4) = 3.80

- **Scenario B**: Two or more roles in one step
  An example of the route map is like this:

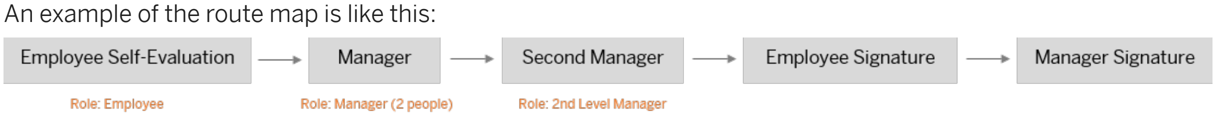


  The ratings and weights for each role are:

Role	Rating (0 - 5)	Weight
Manager	4.00	0.5
First matrix manager	Unrated	0.3
2nd Level Manager	3.80	0.2

  The overall form rating is calculated as follows:
  (4.00 * 0.5 + 3.80 * 0.2) / (0.5 + 0.2) = 3.94

- **Scenario C**: Two or more users with the same role in one step
  An example of the route map is like this:



The ratings and weights for each role are:
If the role of two or more users is the same in one step, set the weight for the step and the weight gets distributed evenly to each user in the step. In the following table, the weight for the *Manager* step is set to 0.6, and then the weight for each user is 0.3 (0.6/2).

Role	Rating (0 - 5)	Weight
Manager 1	4.00	0.3
Manager 2	3.80	0.3
Second Manager	3.80	0.4

The overall form rating is calculated as follows:
(4.00 * 0.3 + 3.80 * 0.3 + 3.80 * 0.4) / (0.3 + 0.3 + 0.4) = 3.86

7.22.5.1 Scenario A: Configuring Business Rules for Overall Customized Weighted Rating Calculation

You can configure business rules to trigger the calculation of the overall customized weighted rating for **Scenario A**.

Prerequisites

- Setting Up Provisioning for configuring business rules
- Assigning Role-Based Permissions for configuring business rules
- You've added the Customized Weighted Rating section in your own form template.
- You've created a route map in the language **English US (English US)**.

> **i Note**
>
> You can still create route maps of other languages for localization purposes, but you must ensure that a route map of **English US (English US)** is created as business rules used here only work for steps and roles defined in **English US (English US)**.

Context

The calculation of the overall customized weighted rating involves two rule scenarios:

- *Trigger Weighted Rating Rule*: You use it to specify the form template and the step at which the calculation of overall customized weighted rating is triggered.
- *Configure Weight for Steps and Roles*: You use it to configure the weights for different steps and roles in the route map.

Procedure

1. Go to *Admin Center* > *Configure Business Rules*.

   You're directed to the *Business Rules Admin* page that contains a list of business rules.
2. Select + .

   You're directed to the *Configure Business Rules* page.
3. Select *Performance Management Weighted Rating* > *Configure Weight for Steps and Roles*.
4. Enter the required information in the following fields:
   - *Rule Name*
   - *Rule ID*
   - *Start Date*

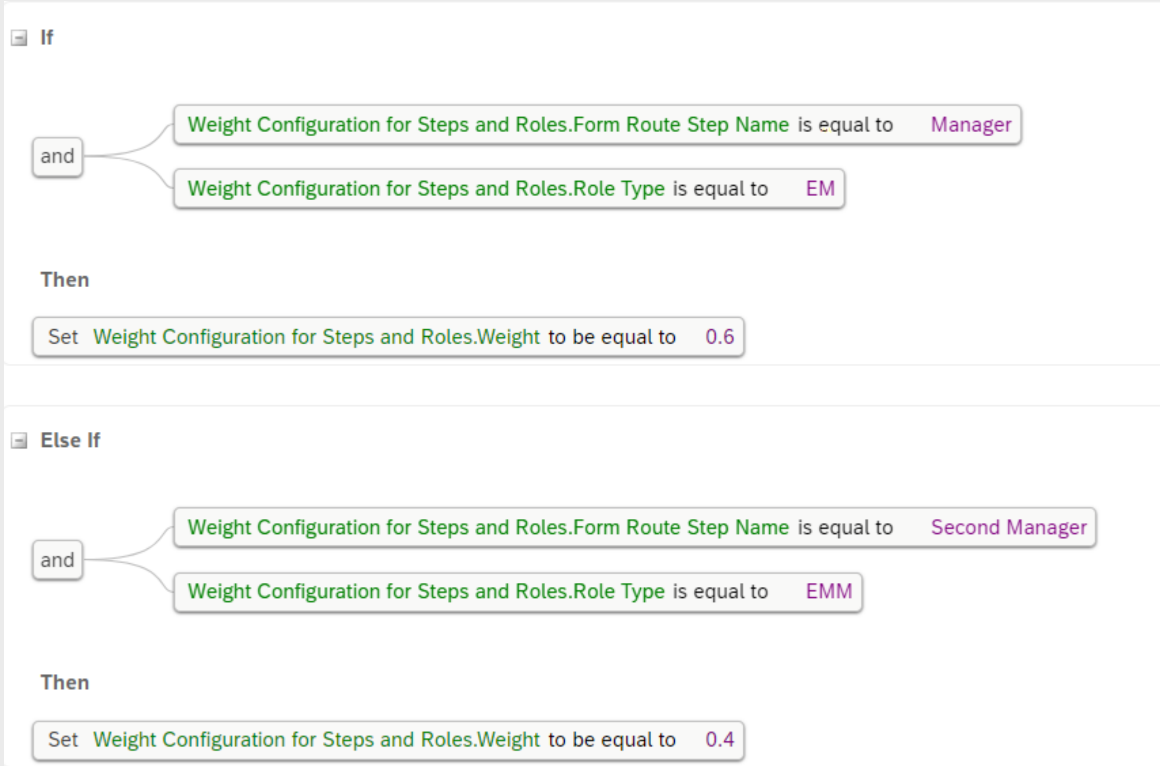
   For example, enter rule name as **`CWR-Demo-Weight`** and rule ID will be auto-filled.
5. Create the *If* and *Then* statements. You specify the step name and role type in the *If* statement and define a weight assigned to each step and role in the *Then* statement.

   Make sure that you enter the step name used in the route map that is created in the language **English US (English US)** and the role value described in Roles [page 32]. For example, if a step is called *Manager* in the route map, enter **`Manager`** as the step name here. If the role in the *Manager* step is Manager, enter *EM* as the corresponding role type.

   > → Tip
   >
   > Make sure that you specify both the step name and role type in the *If* statement.

   The weight can be a number, but not a percentage. For example, if the weight is 40%, enter 0.4.

   > i Note
   >
   > If the weight for a step or a role isn't set in the business rule, it's regarded as 0 in the calculation of the overall customized weighted rating.

> **Example**
>
> 
>

6. Select *Save*.
7. > **Caution**
   >
   > If you've created the **`ratingExtTriggerRule`** rule, don't create it again and you must add an *Else If* statement in this rule at step 9. If so, skip step 7 and 8.

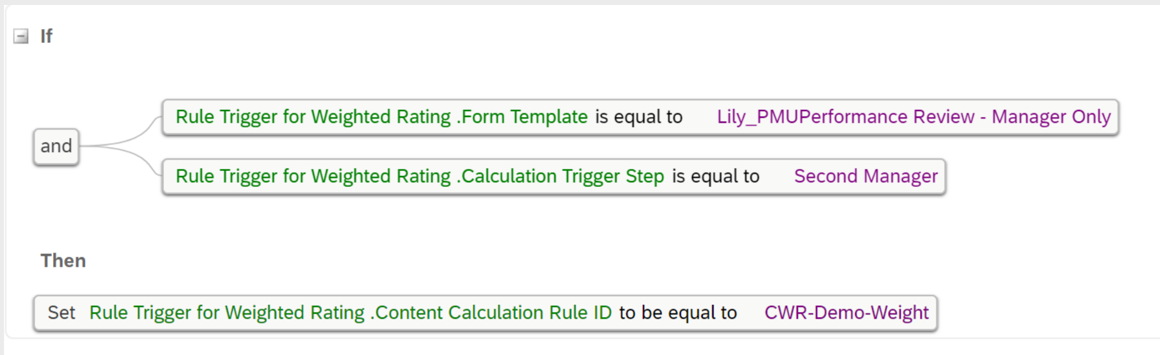
   Click *Create New Rule* and you're directed to the *Configure Business Rules* page. Create a business rule for *Performance Management Weighted Rating* > *Trigger Weighted Rating Rule*.
8. Enter the required information in the following fields:
   - *Rule Name*
   - *Rule ID*
   - *Start Date*

   Enter **`ratingExtTriggerRule`** as the rule name and the rule ID will be auto-filled.

   > **Caution**
   >
   > If you enter a different rule name/rule ID other than **`ratingExtTriggerRule`**, the rule doesn't work in the rating calculation.
9. > **Note**
   >
   > As it's the first time you've created the **`ratingExtTriggerRule`** rule, create an *If* statement as follows. Otherwise, you add an *Else If* statement.

Create the *If* and *Then* statements. You choose the form template for which you want to configure the business rule, specify the step to trigger the calculation in the *If* statement, and set the **Rule ID** created in step 4 in the *Then* statement.

Example



10. Select *Save*.

Next Steps

You can now go with the performance review process. The **`ratingExtTriggerRule`** rule will be executed after the user with the role of *2nd Level Manager* has given the rating at the *Second Manager* step and routed the form to next step. The calculated rating is available after the *Second Manager* step.

→ Tip

If the rule doesn't work as expected or a deep review of the logic of business rules is needed, you can trace a rule to try and figure out exactly what went wrong using the *Business Rule Execution Log* tool. When you create rule traces for *Trigger Weighted Rating Rule* and *Configure Weight for Steps and Roles*, enter the *Login User* as the user at the route step where the **`ratingExtTriggerRule`** rule is executed. See Business Rule Execution Log.

You create the rule traces before the form is routed to the step where the **`ratingExtTriggerRule`** rule is executed. After the form is routed to the step for rule execution and the user has given the rating and sent the form to next step, you can go to *Business Rule Execution Log* to download the full business rule execution log. And, you can set up a rule trace for a maximum time period of **two days**.

7.22.5.2 Scenario B: Configuring Business Rules for Overall Customized Weighted Rating Calculation

You can configure business rules to trigger the calculation of the overall customized weighted rating for **Scenario B**.

Prerequisites

- Setting Up Provisioning for configuring business rules
- Assigning Role-Based Permissions for configuring business rules
- You've added the Customized Weighted Rating section in your own form template.
- You've created a route map in the language **English US (English US)**.

> **i Note**
>
> You can still create route maps of other languages for localization purposes, but you must ensure that a route map of **English US (English US)** is created as business rules used here only work for steps and roles defined in **English US (English US)**.

Context

The calculation of the overall customized weighted rating involves two rule scenarios:

- *Trigger Weighted Rating Rule*: You use it to trigger the calculation of overall customized weighted rating.
- *Configure Weight for Steps and Roles*: You use it to configure the weights for different steps and roles in the route map.

Procedure

1. Go to *Admin Center* > *Configure Business Rules*.

   You're directed to the *Business Rules Admin* page that contains a list of business rules.
2. Select + .

   You're directed to the *Configure Business Rules* page.
3. Select *Performance Management Weighted Rating* > *Configure Weight for Steps and Roles*.
4. Enter the required information in the following fields:
   - *Rule Name*
   - *Rule ID*
   - *Start Date*

   For example, enter rule name as **`CWR-Demo-Weight-01`** and rule ID will be auto-filled.

5. Create the *If* and *Then* statement and define a weight assigned to each step and role in the *Then* statement.

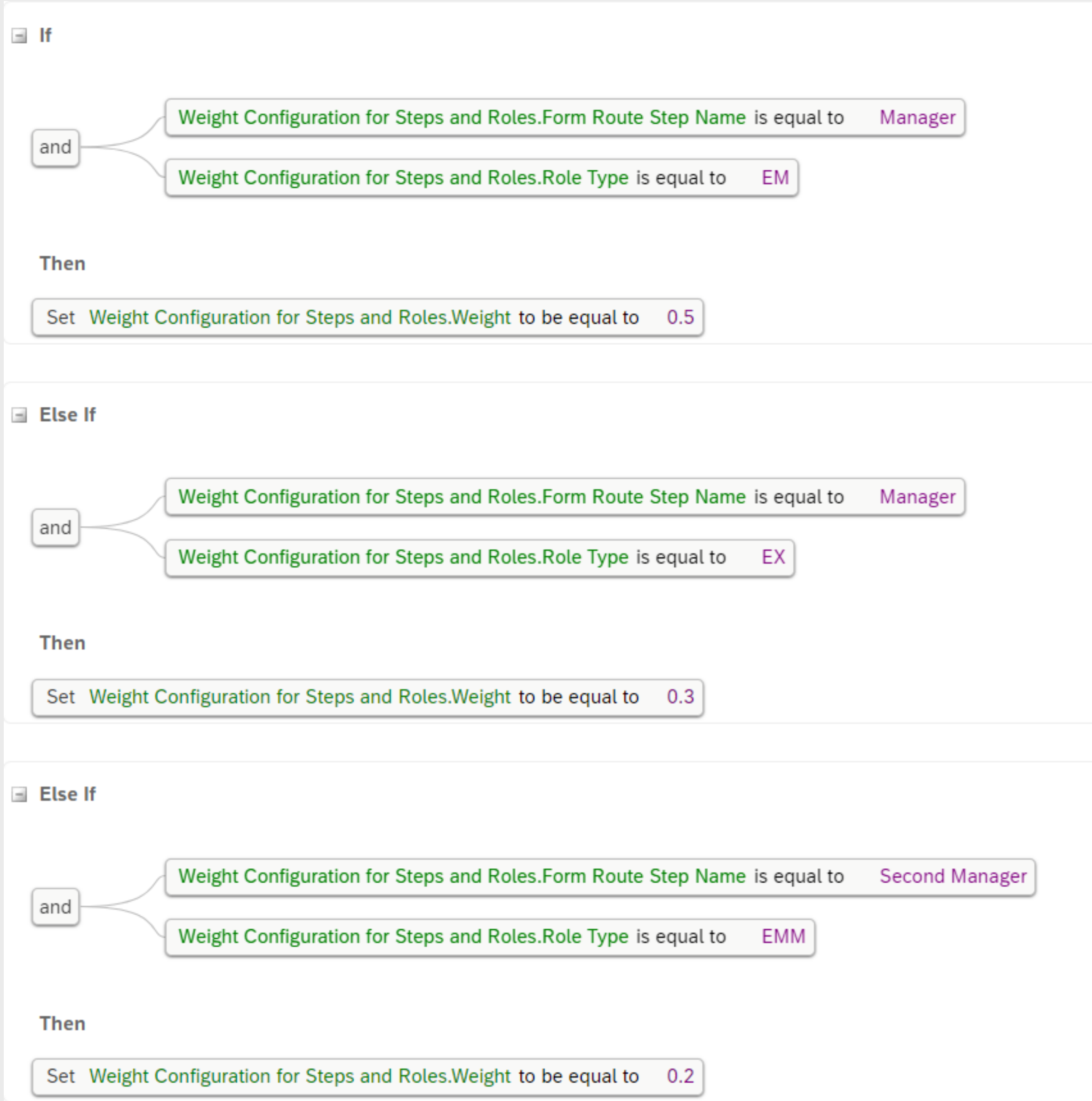
   Make sure that you enter the step name used in the route map that is created in the language **English US (English US)** and the role value described in Roles [page 32]. For example, if a step is called *Manager* in the route map, enter statements. You specify the step name and role type in the **`Manager`** as the step name here. If the role in the *Manager* step is Manager, enter *EM* as the corresponding role type.

   > → Tip
   >
   > Make sure that you specify both the step name and role type in the *If* statement.

   The weight can be a number, but not a percentage. For example, if the weight is 40%, enter 0.4.

   > i Note
   >
   > If the weight for a step or a role isn't set in the business rule, it's regarded as 0 in the calculation of the overall customized weighted rating.

Example



6. Select *Save*.
7. ⚠ Caution

   If you've created the **`ratingExtTriggerRule`** statements. You specify the step name and role type in the rule, don't create it again and you must add an *Else If* statement in this rule at step 9. If so, skip step 7 and 8.

   Click *Create New Rule* and you're directed to the *Configure Business Rules* page. Create a business rule for *Performance Management Weighted Rating* › *Trigger Weighted Rating Rule*.
8. Enter the required information in the following fields:
   - *Rule Name*
   - *Rule ID*

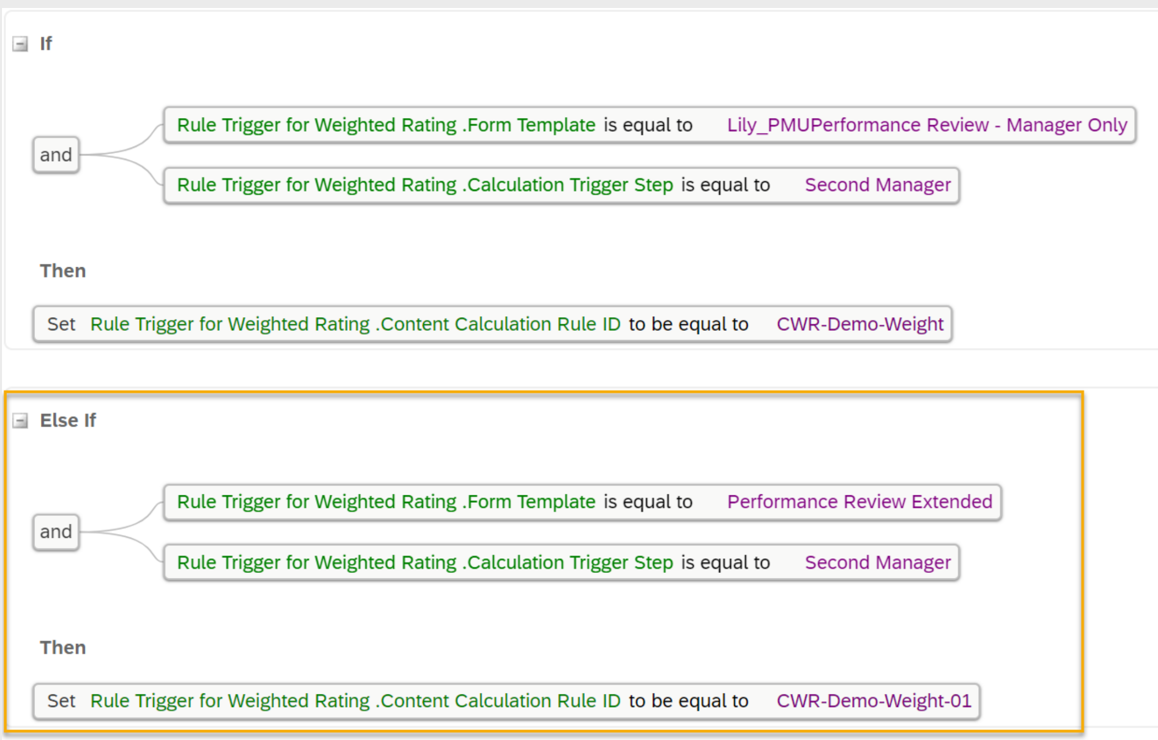
- *Start Date*

Enter **ratingExtTriggerRule** as the rule name and the rule ID will be auto-filled.

> ⚠ Caution
>
> If you enter a different rule name/rule ID other than **ratingExtTriggerRule**, the rule doesn't work in the rating calculation.

9. > i Note
   >
   > As the **ratingExtTriggerRule** rule already exists, add an *Else If* statement as follows. Otherwise, you create an *If* statement.

   Add the *Else If* and *Then* statements. You choose the form template for which you want to configure the business rule and specify the step to trigger the calculation in the *Else If* statement, and then set the **Rule ID** created in step 4 in the *Then* statement.

   > Example
   >
   > 
   >

10. Select *Save*.

Next Steps

You can now go with the performance review process. The **ratingExtTriggerRule** rule will be executed after the user with the role of *2nd Level Manager* has given the rating at the *Second Manager* step and routed the form to next step. The calculated rating is available after the *Second Manager* step.

→ Tip

If the rule doesn't work as expected or a deep review of the logic of business rules is needed, you can trace a rule to try and figure out exactly what went wrong using the *Business Rule Execution Log* tool. When you create rule traces for *Trigger Weighted Rating Rule* and *Configure Weight for Steps and Roles*, enter the *Login User* as the user at the route step where the **`ratingExtTriggerRule`** rule is executed. See Business Rule Execution Log.

You create the rule traces before the form is routed to the step where the **`ratingExtTriggerRule`** rule is executed. After the form is routed to the step for rule execution and the user has given the rating and sent the form to next step, you can go to *Business Rule Execution Log* to download the full business rule execution log. And, you can set up a rule trace for a maximum time period of **two days**.

7.22.5.3 Scenario C: Configuring Business Rules for Overall Customized Weighted Rating Calculation

You can configure business rules to trigger the calculation of the overall customized weighted rating for **Scenario C**.

Prerequisites

- Setting Up Provisioning for configuring business rules
- Assigning Role-Based Permissions for configuring business rules
- You've added the Customized Weighted Rating section in your own form template.
- You've created a route map in the language **English US (English US)**.

i Note

You can still create route maps of other languages for localization purposes, but you must ensure that a route map of **English US (English US)** is created as business rules used here only work for steps and roles defined in **English US (English US)**.

Context

The calculation of the overall customized weighted rating involves two rule scenarios:

- *Trigger Weighted Rating Rule*: You use it to specify the form template and the step at which the calculation of overall customized weighted rating is triggered.
- *Configure Weight for Steps and Roles*: You use it to configure the weights for different steps and roles in the route map.

Procedure

1. Go to *Admin Center* > *Configure Business Rules*.

   You're directed to the *Business Rules Admin* page that contains a list of business rules.
2. Select + .

   You're directed to the *Configure Business Rules* page.
3. Select *Performance Management Weighted Rating* > *Configure Weight for Steps and Roles*.
4. Enter the required information in the following fields:
   - *Rule Name*
   - *Rule ID*
   - *Start Date*

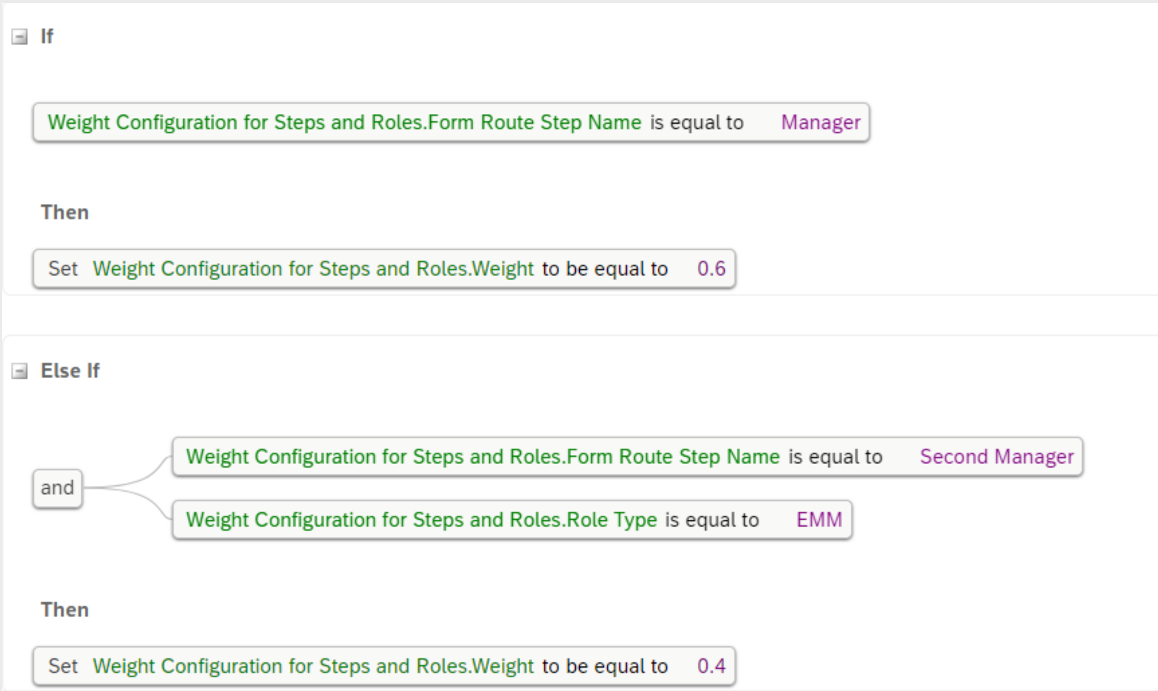
   For example, enter rule name as **`CWR-Demo-Weight-02`** and rule ID will be auto-filled.
5. Create the *If* and *Then* statements. You specify the step name and role type in the *If* statement and define a weight assigned to each step and role in the *Then* statement.

   Make sure that you enter the step name used in the route map that is created in the language **English US (English US)** and the role value described in Roles [page 32]. For example, if a step is called *Manager* in the route map, enter **`Manager`** as the step name here. If the role in the *Manager* step is Manager, enter *EM* as the corresponding role type.

   The weight can be a number, but not a percentage. For example, if the weight is 40%, enter 0.4.

   > **Note**
   >
   > If the weight for a step or a role isn't set in the business rule, it's regarded as 0 in the calculation of the overall customized weighted rating.

Example



6. Select *Save*.
7. **Caution**

   If you've created the **`ratingExtTriggerRule`** rule, don't create it again and you must add an *Else If* statement in this rule at step 9. If so, skip step 7 and 8.

   Click *Create New Rule* and you're directed to the *Configure Business Rules* page. Create a business rule for *Performance Management Weighted Rating* > *Trigger Weighted Rating Rule*.
8. Enter the required information in the following fields:
   - *Rule Name*
   - *Rule ID*
   - *Start Date*

   Enter **`ratingExtTriggerRule`** as the rule name and the rule ID will be auto-filled.

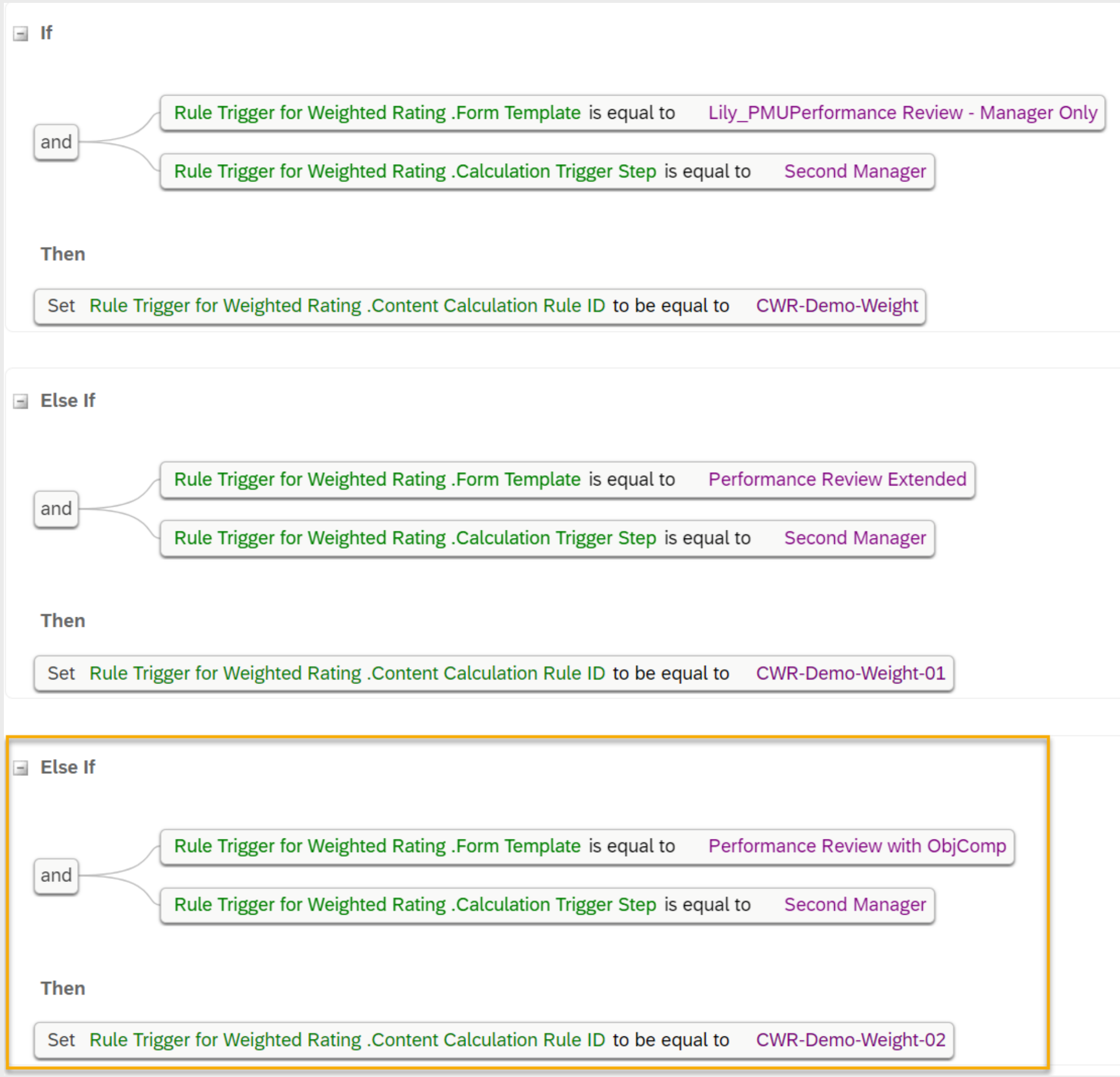
   Caution

   If you enter a different rule name/rule ID other than **`ratingExtTriggerRule`**, the rule doesn't work in the rating calculation.
9. **Note**

   As the **`ratingExtTriggerRule`** rule already exists, add an *Else If* statement as follows. Otherwise, you create an *If* statement.

   Add the *Else If* and *Then* statements. You choose the form template for which you want to configure the business rule and specify the step to trigger the calculation in the *Else If* statement, and then set the **Rule ID** created in step 4 in the *Then* statement.

Example



10. Select *Save*.

Next Steps

You can now go with the performance review process. The **`ratingExtTriggerRule`** rule will be executed after the user with the role of *2nd Level Manager* has given the rating at the *Second Manager* step and routed the form to next step. The calculated rating is available after the *Second Manager* step.

→ Tip

If the rule doesn't work as expected or a deep review of the logic of business rules is needed, you can trace a rule to try and figure out exactly what went wrong using the *Business Rule Execution Log* tool. When you create rule traces for *Trigger Weighted Rating Rule* and *Configure Weight for Steps and Roles*, enter the *Login User* as the user at the route step where the **`ratingExtTriggerRule`** rule is executed. See Business Rule Execution Log.

You create the rule traces before the form is routed to the step where the **`ratingExtTriggerRule`** rule is executed. After the form is routed to the step for rule execution and the user has given the rating and sent the form to next step, you can go to *Business Rule Execution Log* to download the full business rule execution log. And, you can set up a rule trace for a maximum time period of **two days**.

8 Launching Forms

Launch forms based on a well-configured form template so that employees and managers can start performance reviews in a specific time period.

Prerequisites

- You've enabled the permissions of *Mass Create Form Instances (Launch forms now)* and *Schedule Mass Form Creation (Launch forms later)* under *Manage Form Templates* in *Manage Permission Roles*.
- Make sure that employees for whom you want to launch forms have system logon permissions.

Procedure

1. In Admin Center, go to *Launch Forms*.
2. Select *Performance Management* as the type of form that you want to launch and select a form template that you want to use.

   Before going next, you can preview the template, or cancel the launch and modify the template.
3. Set up a launch date.

   You can launch forms now, later on a specified date, or according to a recurring schedule.

   > **Note**
   >
   > If you launch forms according to a recurring schedule, note the following:
   > - We recommend that you not schedule forms to be launched on the hire date. There could be some delay, of a day or two, in importing employee data into the system, and thus forms may fail to be launched on time. However, if you do so, we recommend that you not schedule forms to be launched on the hire date if it's February 29. Otherwise, forms will be launched every four years.
   > - If you choose to launch forms every month and start the recurring schedule on the 31st day of a month, the next launch date will be the last day of the next month. The rule applies to the recurring schedule of every three months and every six months as well.
   > - Make sure that you also create the Schedule Form Creation job in *Manage Scheduled Jobs* in Provisioning. Otherwise, forms will not be launched. For more information, see Creating Job Requests in Related Information.
   >
   > > **→ 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.

4. Select a review period.
5. Select employees for whom you want to launch forms.

Option	Description
All Active Employees	Select this option to launch forms for all active employees in the organization. You can choose to include inactive employees. **i Note** This option can be hidden by selecting the permission of *Hide 'All active/inactive employees' option in Launch Forms wizard* under *General User Permission*.
One Employee	Select this option to launch forms for individual employees. You can add several employees to this list.
Group of employees	Select this option to launch forms for a group of employees. You can select a predefined group, upload a CSV file, or use filters to find employees. **i Note** If you upload a CSV file, make sure that the file uses UTF-8 encoding.

You can also choose to launch forms only for users who don't have an existing form within a specified end date range.

> **i Note**
>
> Those selected employees are dependent on your target population. If you schedule forms to be launched later or according to a recurring schedule, and some of the selected employees have been removed from the target population before the launch date, forms won't be launched for them.

6. Review the previous selections and select the following options as necessary.
   - *Send email notifications to form recipients*: If you select this option, the first person in the route map will receive an email notification that a form is created.

     > **i Note**
     >
     > To send the email notification, make sure that you also set up Document Creation Notification in *E-Mail Notification Templates Settings*.
   - *Create En Route Copy*: If you select this option, the copy of the launched forms will be sent to your En Route form folder.
7. Choose *Launch*.

Results

Forms are launched. You can check progress from the reports tab.

Related Information

Creating Job Requests

8.1 Editing Custom Sections and Custom Fields When Launching Forms Now

When you launch forms now, you can edit the introductory text of custom sections and update custom fields in *Launch Forms*.

Prerequisites

- You've added a custom section in your form template and selected the *Edit Intro text description in Mass create* option for the section.
- You've defined a custom field and selected the *Editable during mass creation of forms* option for the field.

For more information, refer to Configuring Form Sections and Configuring Custom Fields.

Procedure

1. In Admin Center, go to *Launch Forms*.
2. Choose a form template and then select *Now* as the launch date.
3. In a step called Edit Introduction Texts, edit introductory text and custom fields.

Related Information

Configuring Form Sections [page 45]
Configuring Custom Fields [page 89]

8.2 Monitoring the Form Launch Job

After you launch forms using *Launch Forms*, you can monitor the job status and view a job summary within 30 days.

Prerequisites

You've enabled the permissions of *Read Execution Manager Events* and *Read Execution Manager Payload* under *Admin Center Permissions*.

Procedure

1. In Admin Center, go to *Execution Manager Dashboard*.
2. Select a timeframe, *Mass_Create_Form* as a process definition identifier, and process states.

   All form launch jobs within the timeframe are shown in a vertical bar chart.
3. In the job status table, choose ⓘ *(Summary So Far)* to view a job summary.

   The job summary includes the following:
   - Number of forms that were successfully launched
   - Number of forms that were skipped
   - Number of forms that ended with errors
   - Total time taken

8.3 Managing Scheduled Launches

After scheduling a form launch, you can modify or cancel the launch.

Prerequisites

You have scheduled a form launch that runs later. See Launching Forms.

Procedure

1. In *Admin Center*, go to *Manage Scheduled Reviews*.
2. View all the scheduled form launches. On the *Action* column, take the following actions as required.
    - Modify a launch: Choose *Take Action* > *Edit*, and make changes on the *Launch Forms* window.
    - Cancel a launch: Choose *Take Action* > *Delete*, and confirm in the dialog.

Related Information

Launching Forms [page 256]

9 Managing Forms

After launching forms, you can manage those forms in Admin Center while employees and managers are doing performance reviews. Learn about the tasks involved in managing forms.

9.1 Changing Form Dates

You can change the start, end, and due dates of a form.

Prerequisites

Grant the permission of *Change Document Date* under *Manage Documents*.

Procedure

1. In *Admin Center* > *Change Form Date*, search for the forms of which you want to modify the dates. You can do a search in either of the following ways.
    - *Employee Document Folder*: Search for forms in a specific user's inbox, En Route folder, or Completed folder.
    - *Advanced Search*: Search for forms based on user attributes or form attributes.
2. On the search result page, select the forms and choose *Change Date*.
3. In the *Change Document Date* dialog box, enter the new date in the dd/mm/yyyy format, or enter the number of days by which you want the existing date to be extended.
4. Save your changes.

9.2 Routing an Individual Form

As an administrator, you can route an in-progress form one step forward, one step back, to a specific step, or to a new step as necessary.

Prerequisites

Grant the permissions of *Route Document* under *Manage Documents*, including *Include Completed Documents* and *Allow Adding of a Step*.

Context

Each form includes a workflow sequence that determines all the people who review the form and the order in which they review the form. By routing an on-going form, you can manually change the order without modifying the route map.

Procedure

1. In Admin Center, go to *Route Form*.
2. Search for the form by *Form ID*, *Form Template*, *Employee's Folder*, or *Subject User*.
3. From the search results table, select the form you want to route and choose *Next*.
4. Select an option to route the form.
    - Move the form one step forward
    - Move the form one step back
    - Move the form to a specific step
    - Move the form to a new step

    > **i Note**
    >
    > If you select *Move the form one step forward*, you need to choose a validation option: *Skip form validation* or *Validate form*. If you choose the latter, the system validates required fields of the form at the current step according to the following rules:
    > - If the step is a single step, the system validates the fields required for the step owner.
    > - If the step is an iterative step, the system validates the fields required for the substep owner. For example, if the substep owner is EP, all matrix managers' required fields are validated.
    > - If the step is a collaboration step and has no exit user, the system validates the fields required for all collaboration step owners.
    > - If the step is a collaboration step and has one exit user, the system validates the fields required for the exit user.
    > - If the step is a collaboration step and has multiple exit users, the system validates the fields required for all exit users.
5. Select *Next*.
    The form is routed to the step that you selected.

9.3 Routing Multiple Forms by Specifying the Template

You can find all forms that were created based on the same template and mass route the forms at one go.

Prerequisites

Grant the permissions of *Route Document* under *Manage Documents*, including *Include Completed Documents* and *Allow Adding of a Step*.

Procedure

1. In Admin Center, go to *Route Form*.
2. From *Search By* dropdown list, choose *Form Template*.
3. Select a form template and choose *Done*.
4. Optional: Select forms based on groups in either way:
    - Select a form group and select forms based on route maps.
    - Select a form that was created or updated individually.

    For more information on form group, see Form Groups.
5. Choose *Search* to display the forms on the *Route Document* page.
6. Select all the forms you want to route and choose *Next*.

    > → Tip
    >
    > You can select all the listed forms from across the pages by selecting *Select all <n> documents in search results*, or select all the forms on the current page by selecting the *Form ID* checkbox.
7. On the *Select an Action* page, select a route option:
    - Move the form one step forward
    - Move the form one step back
    - Move the form to completion
8. Select a *Reason for changes* and choose *Next*.

Results

The forms are routed to a specific step.

9.3.1 Form Groups

A form group consists of the forms that were mass launched from one form template in a batch.

If you manually modify forms after they were mass launched, they are removed from their group. For example,

- You configured the *Automatic insertion of new manager as next document recipient if not already* setting for document transfer.
- You routed the form back from the signature or completion stage.
- You used User (U) steps in the route map.

For the ungrouped forms, you can route them individually. On average one administrator can route 100 forms an hour manually. Or you can open a support ticket to request these forms to be regrouped for mass routing. See the KBA 2086638.

Note the forms cannot be regrouped in the following cases:

- You configured the *Automatic insertion of new manager as next document recipient if not already* setting for document transfer.
- You routed the form back from the signature or completion stage, and this behavior inserted an additional U step.

9.4 Routing Multiple Forms by Uploading Form ID

You can route multiple forms by uploading form IDs stored in a CSV file to Admin Center.

Context

By uploading the CSV file, you can route multiple forms based on form ID, irrespective of whether the forms are part of different groups or use different form templates.

Procedure

1. In Admin Center, go to *Route Form*.
2. On the *Search for Forms* tab, search by *Form ID*, and choose *Upload CSV File*.
3. Choose *Choose File*, and select the CSV file that contains the form IDs of the forms to be routed, and choose *Upload*.

   > **i Note**
   >
   > If you are using this tool for the first time, choose *Download Template* to download the CSV file template. The CSV file consists of a single coulmn with a Form ID header.

   The corresponding forms are displayed.

4. Select the forms you want to route and choose *Next*.

> → Tip
>
> You can select all the listed forms from across the pages by selecting *Select all <n> documents in search results*, or select all the forms on the current page by selecting the *Form ID* checkbox.

5. On the *Select an Action* page, select a route option:
    - Move the form one step forward
    - Move the form one step back
    - Move the form to completion
6. Select a *Reason for changes* and choose *Next*.

Results

The forms are routed to a specific step.

9.5 Modifying Route Maps

Modify route maps to add, delete, or edit route steps for one or multiple forms that have been already launched.

Prerequisites

You have the role-based permission *Manage Documents* > *Modify Form Route Map*.

Procedure

1. Go to *Admin Center* > *Modify Form Route Map*.
2. Search for forms by *Form ID*, *Form Template*, *Employee's Folder*, or *Subject User*, and choose *Search*.
3. If you select a form template and specify a form group in step 2, you are navigated to the *Select An Action* page with the following options:

Action	What You Can Do
Modify common options	You can modify step name, step introduction, dates, and other text-based attributes.

Action	What You Can Do
Change step types and permissions	You can change the step type and associated permissions for a specific step. Note that these changes will only apply to forms that have not been routed to the selected step.
Add a step	You can add a modification or a signature step.
Remove a step	You can remove a modification or a signature step. Note that the step will only be removed from forms that have not reached the selected step.

4. On the *Modify Form Route Map* page, and add, delete, or edit the route steps within the form.
5. Choose *Next*, the route maps are modified accordingly, and you are navigated to the *Summary* page.

> **i Note**
>
> If you select more than 20 forms for route map modification, that will trigger a job in Provisioning and the system will send you an email about the detailed results.

Results

You have successfully modified the route maps.

9.6 Mass Updating Forms

If new goals are added to a goal plan after forms were launched, you can mass update the forms for newly created goals to display on individual forms and goal reports.

Procedure

1. In Admin Center, go to *Form Template Settings*.
2. Open a form template and select *Open & Save Document*.
3. In the popup window, enter the start and end dates of the forms that you want to update, and choose *Open & Save Document*.

Results

Now all the forms within the specified date range are updated to reflect new content, including new goals.

9.7 Configuring Custom Print

Customize the layout of a Performance Management form that's used for printing.

Prerequisites

The BIRT file of the custom print layout is generated.

Context

If you want to customize the form print layout, note that the BIRT tool doesn't respect field and section permissions configured in the form template.

Procedure

1. In Admin Center, go to *Form Template Settings*.
2. Choose the form template for which you want to customize the print layout.
3. Find the option *Enable Custom Layout Printing* and choose the *Manage Custom Layout* button.
4. Locate the BIRT file and choose *Upload Custom Layout*.

Results

The forms based on the selected template use the custom layout when they are printed.

9.8 Removing Form Visibility

You can make forms invisible to employees without deleting them.

Prerequisites

Grant the permission *Manage Document Visibility* under *Manage Documents*.

Context

You can hide forms from employees who no longer need access to them during a review or by the end of the review cycle. The form will be removed from both the employee's form list and the Team Overview page. This task might be required when employee relationships change during a review event.

> **Note**
>
> - You cannot remove form visibility for users who are outside the route map.
> - This feature only works for forms in the En Route, default Completed, and custom Completed folder.

Procedure

1. In Admin Center, go to *Manage Document Visibility*.
2. Locate forms and users in one of the following ways:
    - *by User*
        1. Enter the *User with Visibility* (from whom you want to remove the visibility) and the *Subject of Document* (the person who is reviewed) in the required fields, and choose *List Documents*.
        2. From the form list, select the forms you want to be invisible to the user.
    - *by Document Id*: Enter the *Document Id* and the *User with Visibility* in the required fields.
    - *by CSV Upload*: Mass remove form visibility by uploading a CSV file that contains form ID and either user ID or user role.
        1. Choose *Download CSV Template* and select *by Roles* or *by User ID* to download the template CSV file.
        2. Fill in the CSV file as required and upload the file to this page.
        3. From the form list, select the forms you want to be invisible to the user.

    > **Note**
    >
    > The maximum number of records in the CSV file is 50,000.
3. Choose *Remove Visibility*.

Results

You have successfully hidden forms from the selected users.

9.9 Restoring Form Visibility

If you've made forms invisible to some users, you can grant them access to the forms again.

Prerequisites

Grant the permission *Manage Document Visibility* under *Manage Documents*.

Context

This feature only works for forms in the En Route, default Completed, and custom Completed folder. If you restore the visibility of forms that was in the custom Completed folder, the forms will be restored into the default Completed folder (Un-Filed).

Procedure

1. In Admin Center, go to *Manage Document Visibility*.
2. Enter the *Document Id* and choose *List Removed Users*.
3. From the *User* table, select the users for whom you want to restore visibility to the form.
4. Choose *Restore Visibility*.

Results

You have successfully restored the access to the form for the selected users.

9.10 Deleting Forms

Delete forms to remove them from the system. You can delete multiple forms at once.

Prerequisites

Grant the permission of *Delete Documents* under *Manage Documents*.

Context

After you delete forms, the attachments included in the forms are not deleted from the system. They remain in the deleted section of the *Manage Documents* admin tool. If you want the attachments to be hard deleted from the system, delete the attachments from the forms directly.

Procedure

1. In Admin Center, go to *Delete Form*.
2. On the *Delete Document* page, search for the forms you want to delete in either of the following ways:

Search Option	Description
Employee Document Folder	Search for the forms in a specific user's Inbox, En Route folder, or Completed folder. **Note** With this option, the form title is displayed in the default language of the form template name rather than in the language of your instance. If your language is different from the default language, we recommend that you use advanced search.
Advanced Search	Search for forms by specifying user attributes, form attributes, or by uploading a CSV file of form ID.

3. Select the forms and choose *Delete*.

> → Tip
>
> You can select all the listed forms from across the pages by selecting *Select all <n> documents in search results*, or select all the forms on the current page by selecting the *Form ID* checkbox.

4. Choose *Yes* to confirm that you want to delete the selected forms.

Results

The forms are removed from the system.

9.11 Restoring Deleted Forms

You can restore a deleted form to the route map step when it was deleted.

Prerequisites

Grant the permission of *Restore Deleted Documents* under *Manage Documents*.

Procedure

1. In Admin Center, go to *Restore Deleted Forms*.
2. On the *Restore Deleted Document* page, search for the forms you want to restore in either of the following ways:

Search Option	Description
Employee Document Folder	Search for the forms in a specific user's Inbox, En Route folder, or Completed folder. **Note** With this option, the form title is displayed in the default language of the form template name rather than in the language of your instance. If your language is different from the default language, we recommend that you use advanced search.
Advanced Search	Search for forms by specifying user attributes or form attributes.

3. Select the forms and choose *Restore*.

> → Tip
>
> You can select all the listed forms from across the pages by selecting *Select all <n> documents in search results*, or select all the forms on the current page by selecting the *Form ID* checkbox.

4. Choose *Yes* to confirm that you want to restore the selected forms.

Results

The forms are restored into the system.

9.12 Importing Overall Scores

You can manually update overall scores for multiple forms by importing a CSV file.

Prerequisites

Grant the permission of *Import Overall Scores Only for Target Population* or *Include All Employees* under *Manage Documents*.

> ℹ Note
>
> *Import Overall Scores Only for Target Population* allows users that have been granted this permission to update manual overall scores for a target population. *Include All Employees* allows users that have been granted this permission to update manual overall scores for all employees.

Context

There're two primary use cases for this feature:

- You have a performance evaluation process that includes a calibration process carried outside the SAP SuccessFactors system, and therefore you need to update the overall scores in Performance Management forms.
- After you start using Performance Management, you want to migrate the performance ratings of employees from previous applications to the SAP SuccessFactors system. With that, you can take advantage of reports and dashboards including all performance ratings of employees in one central place.

You can update performance rating, potential rating, overall competency rating, and overall goal rating. If you update performance rating, and there's more than one section that contains performance rating, the section with highest priority is updated. The following sections are listed in the order of priority from high to low: the customized weighted rating section, the performance potential summary section, and the summary section.

Please note that this feature has the following prerequisites and limitations:

- The sections for which you want to update the score must have manual rating enabled. Otherwise, the import fails with `PERFORMANCE: Manual rating not enabled for Performance score for document Id xxxxx`.
- You can only update rating scale values (scores).
- The imported score must have a match in the section's rating scale value. Rating scale descriptions are not supported.
- The OCOC score is recalculated when the overall competency rating or overall goal rating is updated.
- This feature only works for forms at the Modify stage.
- If an error occurs in one entry of a document, the system stops processing the other entries of that document, but continues to process the entries of other documents.
- For optimum performance, the file size should not exceed 5 MB.

- There's no audit entry made in the forms for scores that have been updated by the import.

Procedure

1. Prepare a CSV file for the import as follows:

   The file must be a CSV UTF-8 (comma-delimited) file and have a .csv extension.

   The header row must contain `DOCUMENT_ID` and at least one of the ratings (`COMPETENCY`, `OBJECTIVE`, `PERFORMANCE`, or `POTENTIAL`) you want to update.

Column	Description	Example
`DOCUMENT_ID`	Document ID. For more information, see Form Information.	5345
`PERFORMANCE`	Performance rating	• 2 • 2.0 • 2.00
`POTENTIAL`	Potential rating	• 2 • 2.0 • 2.00
`COMPETENCY`	Overall competency rating	• 2 • 2.0 • 2.00
`OBJECTIVE`	Overall goal rating	• 2 • 2.0 • 2.00
`USER_ID`	Username. It's a placeholder and performs no function in the import	cgrant

   > **i Note**
   >
   > - Besides numeric values, the following descriptive values are also accepted:
   >   - `UNRATED`: Change the overall score to the value of `default-rating`, which is often defined as "Unrated" rating. This value only works when the rating field is not marked as required.
   >   - `NA`: Change the overall score to the value of `unrated-rating`, which is often defined as "Not applicable" or "Too new to rate". This value is not supported in the goal competency summary section and performance potential summary section.
   > - The number of entries in the header row must match the number of entries in other rows.
   > - Invalid header row entries and blank entries are ignored.

   In this example, performance rating is updated to 3 in a form with the document ID 5245.

DOCUMENT_ID	PERFORMANCE	POTENTIAL	COMPETENCY	OBJECTIVE	USER_ID
5245	3				

2. In Admin Center, go to *Import Overall Scores*.
3. Choose *Browse* to locate the CSV file, and choose *Import Overall Scores*.

Results

When the import is complete, you receive an email about the detailed results of the import.

Related Information

Form Information [page 212]

9.13 Known Behaviors When Using Google Chrome

Learn about the known behaviors when you work with Performance Management forms in the Google Chrome browser.

- When you save your changes after adding or editing goals in a form, the page refreshes and you are taken to the top of the form page. To go to a section of your choice, use the top navigation bar of form sections.

  > **i Note**
  >
  > This is also a known behavior in other browers like Microsoft Edge and Firefox.

- When you add or delete competencies or behaviors in a form, the page refreshes and you are taken to the top of the form page. To go to a section of your choice, use the top navigation bar of form sections.
- If you choose the *Save as PDF* and then the *Show PDF* button, you cannot download and save the form as PDF. You can solve this in one of the following ways:
  - Switch to another web browser or PDF viewer.
  - In your instance using Google Chrome browser, choose the *Save as PDF* button on the form and then the *Show PDF* button. Next, in the preview stage, choose *Print* instead of *Download* icon, and then select *Change*. In the popup window, choose *Save as PDF*. This saves the form as PDF.

10 Integrating with Other Applications

To provide a seamless talent management experience, Performance Management can be integrated with other SAP applications, including those from SAP SuccessFactors. Learn about available integration features and how to achieve integration.

10.1 Performance Management Blocks

You can configure blocks in SAP SuccessFactors People Profile to display ratings from Performance Management forms.

Here's a list of supported blocks related to Performance Management.

- Trend blocks:
  - Overall performance rating block
  - Overall potential rating block
  - Overall goal rating block
  - Overall competency rating block

  These blocks display respective ratings from all forms as multiple records for employees. For more information, refer to Configuring a Trend Information Block in People Profile.
- Scorecard blocks:
  - Performance History block
  - Competencies block
  - Behaviors block
  - Goal Ratings block

  These blocks are affected by processes and display respective ratings according to configuration in a process. For more information, refer to Configuring a Scorecard Block in People Profile.
- History block in the History section: It shows employees' completed forms in the past 12 months. The data isn't configurable.

> **i Note**
>
> - Rating scale labels are displayed in their default language in the blocks.
> - The Performance History block uses predefined fields to display data. You can't add fields to or hide fields from the block.
> - Forms in the Performance History block are sorted alphabetically by form title in a descending order.
> - The Competencies block displays an average of the ratings from Performance Management forms, 360 Reviews forms, and competency ratings from SAP SuccessFactors Learning.
> - To display *Learning URL* in the Competencies block, make sure both the SAP SuccessFactors Learning integration and Transcript features are enabled. For more information, refer to Setting up and Enabling the Transcript Feature.
> - If a competency has more than one rating from different forms, the average rating is displayed in the Competencies block. The same rule applies to behaviors in the Behaviors block.
> - For Scorecard blocks, if the rating scale in a process is different from that in a form, ratings displayed in the blocks will be normalized to the rating scale in the process. For example, the form has a 5-point rating scale, and the rating scale selected in the process is a 3-point rating scale. Therefore, ratings will be normalized to the 3-point scale. Item weight won't be taken into account during the normalization. For more information about normalization, refer to Calculation Process.

Related Information

Calculation Process [page 239]
Configuring a Trend Information Block in People Profile
Configuring a Scorecard Block in People Profile [page 279]
Setting Up and Enabling the Transcript Feature

10.1.1 Source of Rating in Performance History Block

The Performance History block displays the performance, potential, goal, and competency rating, which are from different summary sections on Performance Management forms.

> **i Note**
>
> Make sure you have at least one goal section and one competency section on a form. Otherwise, there will be no ratings in the Performance History block.

The following table shows the sources for the four ratings in different form configurations.

If the form has...	Performance rating will be...	Potential rating will be...	Goal rating will be...	Competency rating will be...
Summary section	Overall form rating in this section	/	/	/
Goal competency summary section	OCOC rating in this section, if enabled	/	Overall goal rating in this section	Overall competency rating in this section
Performance potential summary section	Overall performance rating in this section	Overall potential rating in this section	/	/
Summary section Goal competency summary section	Overall form rating in the summary section	/	Overall goal rating in the goal competency summary section	Overall competency rating in the goal competency summary section
Summary section Performance potential summary section	Overall performance rating in the performance potential summary section	Overall potential rating in the performance potential summary section	/	/
Goal competency summary section Performance potential summary section	Overall performance rating in the performance potential summary section	Overall potential rating in the performance potential summary section	Overall goal rating in the goal competency summary section	Overall competency rating in the goal competency summary section

If the form has...	Performance rating will be...	Potential rating will be...	Goal rating will be...	Competency rating will be...
Summary section Goal competency summary section Performance potential summary section	Overall performance rating in the performance potential summary section	Overall potential rating in the performance potential summary section	Overall goal rating in the goal competency summary section	Overall competency rating in the goal competency summary section

10.1.2 Configuring a Scorecard Block in People Profile

Configure a Scorecard block to display the performance history, competency ratings, behavior ratings, or goal ratings of employees in People Profile.

Prerequisites

- You've added XML code for a background element to Succession Data Model. For more information, refer to Performance Management, 360 Reviews, and the Succession Data Model.
- You've created a process in *Admin Center* > *Processes and Forms* to define which ratings are displayed in the block.

> → Recommendation
>
> For the options of form drilling visibility, we recommend that you select *Managers can drill to see all forms in their team at any point in the process*. So, managers can open all forms in the block no matter whether the forms have been in their form inbox. Otherwise, they can only open the forms that have once been in their form inbox.

Procedure

1. In Admin Center, go to *Configure People Profile*.
2. Drag and drop a Scorecard block to your desired section.
3. Choose the block to open the edit panel and complete the following fields.

Field	Description
Block Title	(Required) The title of the block as it appears on the profile
Block Description	The description of the block, displayed as contextual help text on the profile

Field	Description
Show the description below the block title	By default, users access a block description through the ⓘ *Help* in the block. If you select this option, the block description is shown be-low the title for this block.
Show Ratings as	(Required for the Performance History block) The display option of ratings in the block. The following options are avail-able: • Rating (Unrounded) • Normalized Rating (Unrounded) • Normalized Rating (Rounded) • Normalized Rating (Rounded) - Labels only
Number of entries to display	(Required for the Competencies block) The number of com-petencies and their respective ratings to be displayed in the block
Sort by	(Required for the Competencies block) The display option of competencies. The following options are available: • Most frequently assessed • Competency name

4. On the *Configure People Profile* page, choose *General Settings* on the top.
5. On the right panel, complete the following fields under *Talent Data Settings*.

Field	Description
Include talent data within this date range	Defines a date range. Only ratings within the range are dis-played.
Include talent data from this process	Specifies the forms, succession data, or goal plans from which ratings are retrieved. If you select *All data sources*, all ratings are retrieved. If you select a process, you can check which rating sources are used in *Processes and Forms*.
Include in-progress forms	Defines whether ratings from in-progress forms are dis-played.

> **i Note**
>
> Any change in these fields affects the rating source for the Performance History, Competencies, Behaviors, and Goal Ratings blocks. Goal ratings come from associated forms. If there's no associated form, the goal rating is displayed as 0.

6. Choose *Save*.

Results

The respective data of employees within the configured date range and process is displayed in the block of the profile.

Related Information

Performance Management, 360 Reviews, and the Succession Data Model

10.1.3 Adding People Profile Block Links to Forms

You can add People Profile block links to forms so that users can view profile information when working on the form.

Context

You can add the following block links to the form:

- User Information
- Background
- MDF Information
- Badges
- Tags
- Development Goals
- Curricula Status
- Learning History
- Calibration History
- Position
- Successors
- Performance-Potential Historical Matrix
- How vs What Historical Matrix

For more information on the blocks, refer to Blocks in People Profile.

Procedure

1. In Admin Center, go to *Configure People Profile* and find the **Block Id** and **Block Type** of a block on the right panel.
2. Go to *Manage Templates*, open a form template, and choose a section.
3. Enter `[[BLOCKLINK|blockid|blockType|displayname]]` in *Description*.

   → Recommendation

   For example, in the Introduction section, put `[[BLOCKLINK|block30362|USERINFO_BLOCK|User Information]]` in the *Description* field to link to the User Information block.

4. Save the template.

Results

After forms are launched, users can choose the link in the forms to view profile information.

Related Information

Blocks in People Profile

10.1.4 Enabling Person-Based Performance History Block

For customers who use the multiple employment feature, enable the person-based Performance History block so that users can view employees' performance review data from multiple employments and inactive users' performance history.

Prerequisites

Before using it, please be aware of the following behavior:

When an employee under one employment views their Performance History block, they can view data related to their active employment only. Information about their inactive employment is not available to them because employees don't have the role-based permission to access inactive employment.

Procedure

1. In Admin Center, go to *Company System and Logo Settings*.
2. Select *Enable Person-Based Performance History Block*.
3. Save your change.

Results

A message strip appears in the block, informing that the block shows information from all employments. If there's no performance history, users are informed that no data is found for any employments. The exact number of employments that users view depends on their granted permissions.

10.2 Performance Reviews for Employees on Multiple Employments

Performance Management allows employees on global assignments or concurrent employment to do separate performance reviews.

If you've enabled global assignments or concurrent employment in Employee Central, the following features are supported in Performance Management.

- You can create separate forms for multiple employments of one person.
- Employees on multiple employments have multiple managers, matrix managers, and more. The relationship roles of one employment are involved to review the performance of that employment.
- Employees and managers can access, edit, and route the forms of inactive employment, as explained in the following table.

> **Note**
>
> As an administrator, you can't proxy as a user for their multiple employments and then access the forms from the to-do tasks on the home page. Therefore, you can't see the forms upon choosing them in To-Do.

Role	Action	Details
Employee who returned from multiple employments	Accessing To-Do on the home page	• When the employee logs in to their active employment, they see all forms in To-Do. • When they choose a form for their inactive employment, the form opens and they can rate, comment, and route the form forward. • When they choose a form for their inactive employment, their logon is automatically switched to that of the inactive user.
	Accessing forms in form folders	• When the employee logs in to their active employment, they don't see the forms of inactive employment. • If they switch to their inactive employment, they will see the forms of inactive employment. • From the form Inbox, they can rate, comment, and route the form forward.

Role	Action	Details
	Launching and Routing forms	• The employee can launch a form for which the first step is their former inactive employment. • They can route the forms of inactive employment through all the steps to completion.
Manager of an employee who returned from multiple employments	Accessing To-Do on the home page	• The manager will see all forms of the employee's inactive employment in To-Do. • When the manager chooses a form for the employee's inactive employment, the form opens and they can rate, comment, and route the form forward.
	Accessing forms in form folders	• The manager will see the forms of the employee's inactive employment in the form Inbox. From the Inbox, the manager can rate, comment, and route the form forward. • The manager will see the forms of the employee's inactive employment in Team Overview and Stack Ranker. If the form is in their form Inbox, or they have the Out of Turn Access permission, they can rate, comment, and route the form forward.
Manager who returned from multiple employments	Accessing To-Do on the home page	The manager can access employees' forms from their inactive employment in To-Do.

Role	Action	Details
	Routing forms	For active users who used to report to the manager's inactive employment, • If forms are to be sent to the manager, they will be routed to the form Inbox of the manager's inactive employment. • Forms in an iterative step will be routed to the form Inbox of the manager's inactive employment. • Forms in a collaboration step will be routed to the form Inbox of the manager's inactive employment. The manager will be the exit user.

- For the information about to-do tasks for employees with multiple employments, see To-Do List.

Limitations

- The competency information of inactive employment is not available in the Competency block in People Profile.

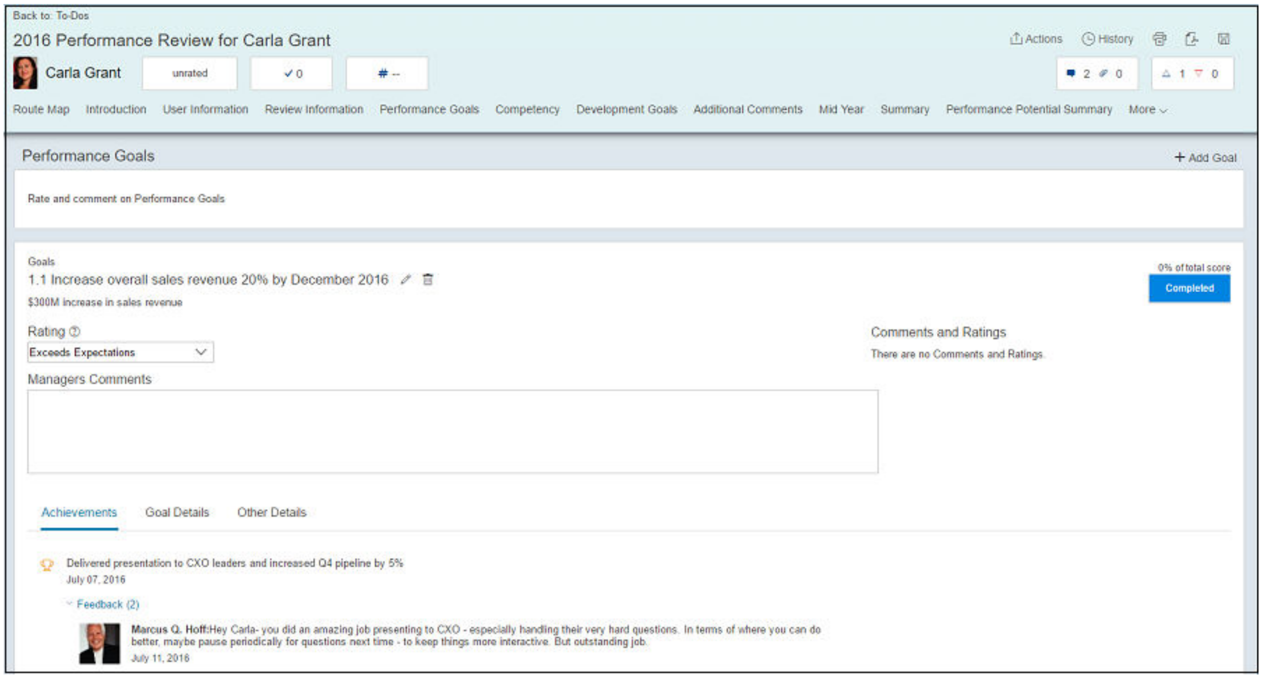
Related Information

Global Assignments Overview
Concurrent Employment
To-Do List

10.3 Achievements and Feedback from Continuous Performance Management

Performance Management forms can display achievements and feedback linked to employees' goals in Continuous Performance Management as supplemental information during the performance review cycle.

If configured, they're shown on the *Achievements* tab in goal sections, as shown in the following screenshot.



For the achievements to appear on the form, make sure that the achievements are dated between the start and end date of the form. For example, an achievement dated August 15 won't appear on a form with a start date of November 20 and an end date of December 10.

If achievements or feedback is deleted from Continuous Performance Management, the data is removed from forms as well, even though the forms might be completed. So, we recommend don't delete the data that is reused on forms.

10.3.1 Enabling Achievements and Feedback on Forms

Configure your form template so that users can view employee's achievements and feedback directly on forms.

Prerequisites

- Your product edition is Enterprise or SPRAC.
- You've granted users with the *View* permission of *Achievement* under *User Permissions* > *Continuous Performance Management* in *Manage Permission Roles*.

Procedure

1. In Admin Center, go to *Form Template Settings* and open a form template.
2. Select the following options.

- Enable Achievements tab in Performance Goal Section
- Display Achievement Feedback for Performance Goal Achievements
- Enable Achievements tab in Performance Development Goal Section
- Display Achievement Feedback for Development Goal Achievements

3. Choose *Update Form Template*.

   The *Achievements* tab is now available to all users with the role-based permission specified in Prerequisites. This applies to the forms that have been already launched as well.
4. Optional: Define the `<tab-permission>` element in the form template to control user access to the tab.

Related Information

Form Permissions in XML Template [page 164]

10.4 Configuring Compensation Section on Forms

Configure the Compensation section in a form template so that Performance Management forms can display compensation-related information and a link to the Compensation form.

Prerequisites

- You've enabled SAP SuccessFactors Compensation and configured a Compensation form template.
- You have access to 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. In Provisioning, go to *Form Template Administration* and copy the ID of the Compensation form template.
2. On the *All Form Templates* page, open the Performance Management form template that you want to configure.
3. Under *Add New Section*, select *Compensation*, add a name for the section, and choose *Add*.
4. Under *Edit Sections*, add the following elements in the newly added Compensation section.

Element	Description
`<compensation-template-id>`	Compensation form template ID
`<compensation-field>`	Field on Compensation forms that will be displayed on Performance Management forms

Sample Code

```
<compensation-template-id><![CDATA[708]]></compensation-template-id>
<compensation-field id="pmRating" show-if-value-empty="true"></compensation-
field>
```

5. Choose *Save Form*.

Results

After you launch a Performance Management form, the form will have a Compensation section. Also, a Compensation form will be created.

10.5 Data Integration with Human Resource Information System

Data integration between Performance Management and your Human Resource Information System (HRIS) or payroll system allows updating your employee data from a single source. With this simple data transfer process, the updates you enter into your HRIS will be passed to Performance Management without duplicated efforts.

Introduction

This integration requires the export of the defined data fields into a flat file, which is uploaded through Admin Center. The update process can be automated using a Secure File Transport Protocol (SFTP) process and executed according to your schedule to maintain synchronized data.

Business Rules for Data Transfer

To import data from an HRIS (or other data source) into Performance Management, certain business rules MUST be followed.

- The file must be in Comma-Separated Values (.csv) format. The file can be a plain text file (.txt) too but the values must be separated by commas. For values with commas, we suggest enclosing them in quotes so they load properly.

- Take care when using data fields with leading zeroes. Spreadsheet applications such as Microsoft Excel strip leading zeroes from data fields, which could corrupt the data. If there are leading zeroes in the data file, verify the leading zeroes are present in the file before uploading.
- The file must contain two rows of predefined column IDs and labels. A template for these column IDs and labels can be exported from the system using the *Export Template* option.
- All fields are case-sensitive and reflect what is loaded in the data load.
- JOBCODE is case-sensitive and must match exactly the job codes designated for roles. To see a list of families and roles, go to *Admin Center* > *Manage Job Profile Content*.
- JOBCODE is used to determine competency mapping, which allows competencies to be populated on forms and worksheets based on the value in the JOBCODE field. If the company is using job profiles, the value entered in this column determines what set of competencies will be displayed on the form for that employee. This value may be the actual job code from the HRIS or a derived code: Many customers choose to combine job codes into broad employee groups to simplify administration of competency sets that are common across many roles in the same group. This decision should be made by the implementation team based on the process.

  Example

JOB CODE	EMPLOYEE GROUP
EXEC	Officers and Executives
SMGR	Seniors managers or employees who manage multiple functions
MGR	Single function managers
SUP	First Line Supervisors
PROF	Professionals or managerial level knowledge workers who don't supervise others
IC	Individual Contributors

- STATUS must be the first field and USERID must be the second field and the upper-case header must be repeated for the second row. The remaining fields need not be in the order presented here. If a field won't be populated, don't include it in the import file. If that field in the file is blank, it wipes out what is already in the database.
- USERID is the system unique value for each user and must be unique. This value is visible in a variety of places to all end users. Accordingly, USERID shouldn't contain data that is considered confidential, such as a social security number. This value must be passed with each employee data record during each upload.

  > **Note**
  >
  > Exert extra care when assigning a value to USERID, because the decision has a permanent effect: after the value is saved, it cannot be changed.

- USERNAME is a unique name for each user and is used as the logon ID value. This value is visible in a variety of places to all end users. Accordingly, USERNAME shouldn't contain data that is considered confidential, such as social security number. Unlike USERID, this value can be updated if needed. Most customers choose to use the same USERNAME that they use for their local network or email application.
- The definition of which fields are required is the minimum requirement and must be populated. The additional recommended fields are used in the system for reporting and are important for grouping data. Additional fields

can be marked as required during initial implementation based on business need. The order of fields displayed on the Personal Information screen can be modified if necessary.

- During the initial setup, you can use an option to control whether employees should be allowed to edit or not to edit the data loaded into the employee record (on the Personal Information screen).

> **Note**
>
> We strongly recommend these edit rights be turned off to maintain sync of data with the HRIS. Take care to understand impact of ability of the user to update certain variables directly. Values updated from the user interface will be overwritten by the next data load from the HRIS.

- The individual fields in the employee record can also be hidden during the initial setup so that they won't display in the Personal Information screen. This allows for the storage of data associated with each individual, passed from the HRIS to be used by one or more processes, but this data isn't displayed on the Personal Information screen (accessed by the employee).
- If the DEPARTMENT, DIVISION, or LOCATION field isn't used, don't include them in the import file. Otherwise, the system will automatically assign "N/A" values to these fields. Report security is tied to these values and entering a common value, such as NA, will allow for the broadest reporting access to the data. Leaving it blank will limit reporting access.
- Data placed in the DEPARTMENT, DIVISION, and LOCATION fields may be a code or a text name. The value entered will appear in dropdown menus.
- Data labels are limited to 100 characters.
- Most string values are limited to 255 characters. Exceptions are USERID (100), USERNAME (100), FIRSTNAME (128), LASTNAME (128), MI (128), GENDER (2), EMAIL (100), DEPARTMENT (128), DIVISION (128), LOCATION (128), MANAGER (100), HR (100), JOBCODE (128), and TIMEZONE (32).
- Date format must be mm/dd/yyyy.
- HIREDATE is used in Performance Management to display the defined date and can be the date used to initiate an automatic form creation for this user. The value in the HIREDATE field doesn't have to be the actual hire date and may be a derived date from the HRIS system (examples: hire date + 90 days, last review date - 60 days). The system can be set to automatically generate a new form for this employee based on the month/day combination of this field value (example: if Jim's hire date is 01/04/2016, the system can be set to automatically create a new form for Jim each January 4).
- Custom fields can be defined to import additional information, such as the FLSA code. However, this data doesn't show up anywhere in the system, other than the People Profile or custom fields in a form. They can also be used in the Organization Chart.
- Performance Management uses the MANAGER field to create the organizational hierarchy within the system. Each employee must have a valid manager. When data is loaded, Performance Management validates that each employee has a valid manager listed in their data record. This validation check is executed against the employees held in the existing database. Therefore, the MANAGER field in each employee record must hold a valid USERID of someone in the existing database. If a user who doesn't have a valid manager attempts to login, the attempt will fail and the user will receive an error message.
- The individual at the top of the organizational hierarchy, such as the CEO, must have NO_MANAGER (in all caps) listed in the MANAGER data field, so that the system knows how to treat this individual in the routing chain. This value must be exactly NO_MANAGER. Other values, such NO_MGR, will fail.
- Since the data load validation process validates the MANAGER and HR data against the existing database, we strongly recommend the new employees be added to the beginning of the data load file. This allows the new employee to be loaded first in case the new employee is a manager or HR rep referenced later in the data file and improves processing speed, especially for large files.

- COUNTRY can be used to determine which of several possible Privacy Consent Statements will be presented to a new user. If the Privacy Consent feature is enabled, when users log into the system the next time, they'll go directly to the data consent page, the content of which can differ depending on their COUNTRY. Users can then choose to accept or decline the terms presented.
- MATRIX_MANAGER, CUSTOM_MANAGER, and SECOND_MANAGER fields are not required in the data file unless those relationships are required for permissions or form routing. MATRIX_MANAGER and CUSTOM_MANAGER can include multiple managers. The syntax is to separate the manager IDs with pipe (|) characters.

    > Example
    >
    > "gsmith624|sholmes423|smaddox666"

- DEFAULT_LOCALE is not required in data file. If present, the values in the field determine the languages the system use for individual users (one language per user). If the field is left blank for a user, the user's existing value won't be changed. Example: Bo had previously selected "it_IT" (Italian) and the data file now includes the DEFAULT_LOCALE field with a blank value for Bo; his value for default locale remains "it_IT", which is his previous selection rather than the company-wide default language.
- PROXY is not required in data file. If present, the value in the field defines which person can act as proxy on behalf of the user. If left blank, no proxy holder will be assigned and existing proxy holders will be removed. The field can include multiple proxy holders. The syntax would be to separate the proxy holder IDs with pipe (|) characters.

    > Example
    >
    > "admin|sholmes423|smaddox666"

- TIMEZONE is required in the system for internal time/date stamps in the time of the user. If a TIMEZONE value isn't loaded, the field is automatically populated with a default of Eastern Standard Time. Records may be set to one value (example: time zone of corporation) rather than different zones for each employee.

10.6 Qualtrics Feedback for Performance Reviews

By integrating your SAP SuccessFactors system with Qualtrics, you can request feedback from employees and managers during the different steps that happen at the end of a performance review.

You can integrate survey opportunities in single role, iterative, and collaboration steps. For example, with a performance review template that contains three steps (employee assessment, manager assessment, and employee signature), you can have a survey after both the employee and manager assessment steps. You can create survey opportunities at one or multiple steps.

Qualtrics surveys allow you to gain feedback from your employees such as:

- How would you rate the performance review process?
- Are you satisfied with the review results you got?
- Would you like to add review steps to the performance review process?

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

Related Information

Integrating SAP SuccessFactors with Qualtrics

10.7 Performance Management on the Latest Home Page

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

Name	Description	Where Shown	When Shown	Prerequisites	On Mobile?
Review Your Performance (self-review)	Prompts you to complete performance reviews for yourself. **Note** If the form template name is changed after forms are launched, the name won't be changed on to-do tasks. It remains as the name upon the launch of the forms. (To-Do Category 0)	*For You Today*	Appears when a performance review form is added to your form 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*.	Yes

Name	Description	Where Shown	When Shown	Prerequisites	On Mobile?
Review Employee Performance (for others)	Prompts you to complete performance reviews for your team. If managers have more than one task, tasks are grouped into *Direct Reports*, *Matrix Reports*, and *Other* on the stack view. **Note** If the form template name is changed after forms are launched, the name won't be changed on to-do tasks. It remains as the name upon the launch of the forms. (To-Do Category 0)	*For You Today*	Appears when a performance review form is added to your form 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*.	Yes

10.8 Reporting for Performance Reviews

You can use reporting tools in SAP SuccessFactors People Analytics, such as Table reports and Story reports, to report Performance Management data.

For information on Table reports, refer to the Table Reports guide. For information on Story reports, refer to the Stories in People Analytics guide.

Notes About Table Reports

- If customers have removed a configured language for a competency and add it back, the following columns of the competency are empty in Table reports:
  - Competency Category Name

    - Competency Source
    - Core Competency
    - Competency Name (Locale Specific)
    - Behavior Name (Locale Specific)
- Table reports don't report the localized fields defined in message keys in the template XML, for example, section names and adjusted ratings. Therefore, the fields are reported only in the language in which forms are saved rather than in logged-in users' languages.

Notes About Story Reports

In an instance with Talent Intelligence Hub enabled, competencies once associated with a form and then deleted from the Attributes Library can be reported in Story reports.

Related Information

Table Reports
Stories in People Analytics

10.8.1 Types of Rating Description Columns in Table Reports

You can report three different types of rating description in table reports.

- **Rating description columns (default locale)**: Show the rating descriptions that were configured using the *Rating Scales* tool, in the rating scale default locale.
  Also, all the matrix grid scale columns show the latest description for in-progress forms, which were configured using *Admin Center* > *Matrix Grid Scale*, in the company default locale.
- **Rating description columns (locale specific)**: There are 20 columns for localized descriptions. These column names are appended with the text *(Locale Specific)* and appear next to the column with default locale.

  > **Note**
  >
  > Out of these 20 columns, 13 columns are scale-based columns, which were configured using *Rating Scales*. Seven are template-based, also known as Adjusted columns, which were configured in the template using Rating Scale Adjusted Calculation.

- **Unadjusted rating description columns (locale specific)**: There are four columns for localized scale-based descriptions. These columns are prefixed with the text *Unadjusted* and are shown just after the *(Locale Specific)* column.

Rating Description Columns

The following table lists the three different types of rating description columns:

Rating Description Columns (Default Locale)	Rating Description Columns (Locale Specific)	Unadjusted Rating Description Columns (Locale Specific)
Overall Competency Rating Description	Overall Competency Rating Description (Locale Specific)	
Calculated Overall Competency Rating Description	Calculated Overall Competency Rating Description (Locale Specific)	
Adjusted Overall Competency Rating Description	Adjusted Overall Competency Rating Description (Locale Specific)	
Competency Other Rating Description	Competency Other Rating Description (Locale Specific)	
Competency Self Rating Description	Competency Self Rating Description (Locale Specific)	
Competency Official Rating Description	Competency Official Rating Description (Locale Specific)	Unadjusted Competency Official Rating Description (Locale Specific)
Behavior Other Rating Description	Behavior Other Rating Description (Locale Specific)	
Behavior Self Rating Description	Behavior Self Rating Description (Locale Specific)	
Behavior Official Rating Description	Behavior Official Rating Description (Locale Specific)	
Overall Goal Rating Description	Overall Goal Rating Description (Locale Specific)	
Calculated Overall Goal Rating Description	Calculated Overall Goal Rating Description (Locale Specific)	
Adjusted Overall Goal Rating Description	Adjusted Overall Goal Rating Description (Locale Specific)	
Goal Self Rating Description	Goal Self Rating Description (Locale Specific)	
Goal Official Rating Description	Goal Official Rating Description (Locale Specific)	Unadjusted Goal Official Rating Description (Locale Specific)
Goal Other Rating Description	Goal Other Rating Description (Locale Specific)	

Rating Description Columns (Default Locale)	Rating Description Columns (Locale Specific)	Unadjusted Rating Description Columns (Locale Specific)
Overall Performance Rating Description	Overall Performance Rating Description (Locale Specific)	Unadjusted Overall Performance Rating Description (Locale Specific)
Calculated Overall Performance Rating Description	Calculated Overall Performance Rating Description (Locale Specific)	
Unadjusted Calculated Overall Performance Rating Description	Unadjusted Calculated Overall Performance Rating Description (Locale Specific)	
Overall Potential Rating Description	Overall Potential Rating Description (Locale Specific)	
Section Rating Label	Section Rating Label (Locale Specific)	Unadjusted Section Rating Label (Locale Specific)

10.8.1.1 Limitations of Rating Description Columns

Learn about known limitations of the rating description columns in table reports.

- If the rating descriptions are not available in the logged in user's locale, they are shown in the default locale in scale-based columns.

  > **i Note**
  >
  > If the default company locale changes, the matrix grid scale localized columns might be affected.

- If you configure filters for the localized columns and use unadjusted rating descriptions, the columns might show duplicate and unsorted descriptions.

  > **→ Recommendation**
  >
  > We recommend that you use localized columns for report generation. When applying a filter to a rating description, you should use the default rating description column.

- The *Sort columns* and *Group by (in report generation)* actions might not show the correct sorting order when locale-specific columns and unadjusted rating descriptions are used.

  > **→ Recommendation**
  >
  > We recommend that you use the default rating description columns for the *Sort columns* and *Group by* actions on rating description columns.

- If the rating description of the rating scale or matrix grid rating scale is changed after the form is completed or launched, the latest description will be used for localization. However, this might lead to data discrepancy between the rating description on the form and the localized descriptions in table reports.

- For rating descriptions, configuration is always picked from the latest form template. If there's any change in the adjusted rating configuration or scale name, or if any section is added or deleted after the form is launched, there might be discrepancy in the localized descriptions.
- If you want to view localized values for the existing rating descriptions in table reports, you need to reconfigure the localized columns.
- Localization is provided based on the scale ID. If the scale ID is not saved in the report table, localized values are not shown. In this case, only the adjusted columns show localized descriptions because these columns were configured in the form template.
- If adjusted columns time out when users configure filters and dashboards or generating online reports, we suggest using these columns only for generating offline reports.
- For unadjusted columns, if the rating description is same in both the scale-based and template-based configurations, localizations from the scale ID are used for those descriptions.
- When the logged-in user's locale is not the company's default locale, the standard tiles from SuccessStore do not support localized columns. To display the data of localized columns, choose *Build Tile* from *Admin Center* > *Manage Dashboards* > *Manage Standard Dashboards and YouCalc Files*.

10.8.2 Route Entry Table in Story Reports

The route entry table contains details on the route steps of forms in story reports.

The following table explains some route entry columns and values.

Column	Value	Description
Step Start Date Behavior	infoOnly	If you didn't enforce start date to be effective, the value shows *infoOnly*.
	enforced	If you enforced start date to be effective, the value shows *enforced*.
Step Due Date Action	doNothing	If you didn't select the setting to automatically send forms on due date, the value shows *doNothing*.
	sendValid	If you selected the setting to automatically send the forms that pass validation on due date, the value shows *sendValid*.
	forceSend	If you selected the setting to automatically send forms on due date regardless of validation, the value shows *forceSend*.
Step Is Predefined	true	If the step was created in a route map, the value shows *true*.
	false	If the step was created by user action, for example, users added a signer or asked for feedback, the value shows *false*.
Step Base User	user ID	If the step role is User (U), UM, UH, UMM, or UHM, the value shows the user ID of the User.

i Note

All values in the route entry table don't support localization.

Related Information

Creating a Route Map [page 26]

10.8.3 Migrating Completed Form Data to Table Reports

Migrate completed form data to table reports so that the Matrix Grid Scale rating label is consistent in the form and table reports.

Prerequisites

You have access to 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.

Context

When the form data is synced to reporting, by default, both in-progress and completed forms are included. You can choose to sync only the completed forms so that even if the Matrix Grid Scale rating label is updated after the form is completed, there's no discrepancy between the form and table reports.

Procedure

1. In Provisioning, go to *Company Settings* > *Ad Hoc Report Builder* > *Performance Management Sync* and choose *Sync*.
2. In the *Create New Job* dialog box, under *Job Parameters*, select *Migrate Completed Forms: If enabled, in-progress forms will not be migrated; only completed forms will be migrated*.
3. Choose *Create & Run Job*.

10.9 Adding Growth Portfolio Links to Forms

You can add Growth Portfolio links to forms so that users can view employees' Growth Portfolio when working on the forms.

Prerequisites

- You've upgraded to Talent Intelligence Hub.

> **Note**
>
> Talent Intelligence Hub is in the early adoption phase and is available only for customers who have enabled Job Description Manager or Job Profile Builder.
>
> - If you're using Job Description Manager, you can upgrade to Talent Intelligence Hub using *Admin Center* > *Upgrade Center*. For more information, refer to **Migrating from Job Description Manager to Talent Intelligence Hub** in the **Related Information** section.
> - If you're using Job Profile Builder, you can upgrade to Talent Intelligence Hub using *Admin Center* > *Upgrade Center*. For more information, refer to **Migrating from Job Profile Builder to Talent Intelligence Hub** in the **Related Information** section.

- You've enabled the Growth Portfolio.
- You have the following role-based permissions under *Administrator Permissions* > *Manage Form Templates*:
  - *Comprehensive template configuration for PMv12*
  - *Form Templates*

Context

You can add the link to the following places:

- The *Actions* dropdown menu that appears in the Route Map section and the top right of the form.
- The description of any form section.

Procedure

- To add a Growth Portfolio link to the Actions dropdown menu, do the following:
  a. Go to *Admin Center* > *Form Template Settings*.
  b. Open a form template.
  c. Select *Show Access to Employee's Growth Portfolio on Performance Management Forms*.

d. Save your change.

- To add a Growth Portfolio link to the description of a form section, do the following:

a. Go to *Admin Center* > *Manage Templates*.
b. Under *Performance Review*, open a form template and choose a section.
c. In *Description*, enter `[[GPLINK|HOME|<link text>]]`.

For example, `[[GPLINK|HOME|Go to Growth Portfolio]]`.

d. Save your change.

Related Information

Talent Intelligence Hub
Enabling the Growth Portfolio
Migrating from Job Description Manager to Talent Intelligence Hub
Migrating from Job Profile Builder to Talent Intelligence Hub

11 Mobile Performance Reviews

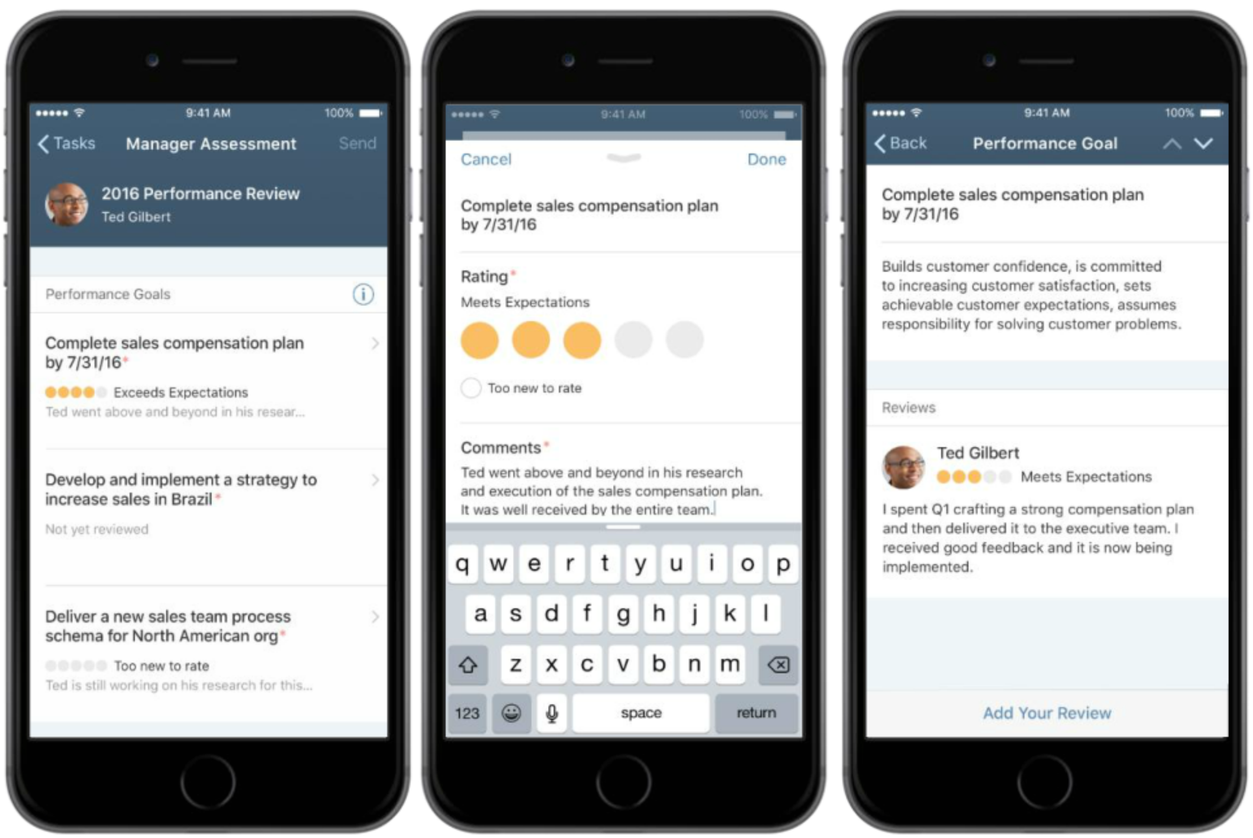
Selected features of Performance Management are available for users in the SAP SuccessFactors Mobile application.

→ Recommendation

We recommend that before you adopt this feature, learn about current feature support, and test it in your Preview environment.

You can perform the following tasks on your mobile device:

- View and provide ratings and comments for performance goals, development goals, and competencies in the form.
- View summary section's calculated or adjusted calculated form rating and provide manual overall rating.
- View signature section, signers, and date of signature.
- Route, sign, and complete forms.



Related Information

Mobile Performance Management Feature Support [page 302]

11.1 Enabling Mobile Performance Management

Enable the mobile performance review feature so that users can review performance on their mobile devices.

Prerequisites

The following settings are enabled in Provisioning:

- *Performance Management*
- *Mobile PM Reviews*

> → 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. In Admin Center, go to *Enable Mobile Features*.

   The *Mobile Settings* page opens.
2. Choose *Modules*, and under *Talent*, select *Performance Review*.

Results

The mobile performance review feature is enabled on your mobile devices.

11.2 Mobile Performance Management Feature Support

Learn about all the Performance Management features that are supported on mobile devices.

Performance review features are supported, partially supported, or not supported in the mobile applications.

- Supported: This feature is well supported for mobile performance reviews.
- Partially supported: This feature is available for mobile performance reviews, but there's a gap between mobile and web applications.
- Not supported: This feature is not available for mobile performance reviews.

Supported Operating Systems

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

Form Sections

Form Section	Mobile Status	Notes
Custom	Supported	
Performance Goal	Partially supported	See Performance Goal Section in this topic for details.
Competency	Partially supported	See Competency Section in this topic for details.
Development Goal	Partially supported	See Development Goal Section in this topic for details.
Summary	Partially supported	See Summary Section in this topic for details.
Signature	Partially supported	See Signature Section in this topic for details.
Goal Competency Summary	Partially supported	See Goal Competency Summary Section in this topic for details.
Performance Potential Summary	Not supported	
Introduction	Not supported	
Review Dates	Not supported	
Employee Information	Not supported	
Job Description	Not supported	
Compensation	Not supported	

Route Map Steps

Route Map Step	Mobile Status
Single Role Step	Supported
Iterative Step	Supported
Collaboration Step	Supported
Signature Step	Supported
Completion	Supported

Routing Actions

Route Map Action	Mobile Status
Send to Next Step	Supported
Complete Form	Supported
Sign Form	Supported
Routing Comments	Supported
(For signature steps) Reject Form	Supported
Enforce Start Date	Not supported
Send to Previous Step	Not supported
Get Feedback	Not supported
Add Modifier	Not supported
Add Signer	Not supported

User Roles

Role	Mobile Status
All roles	Supported

Rating Options

Rating Option	Mobile Status
All rating options (0, 1, 2, & 3)	Supported

Rating Scale Options

Rating Scale	Mobile Status
All rating scale score types	Supported
Circle icon scale	Supported
Dropdown with numeric rating values	Supported
Dropdown without numeric rating values	Supported
Star icon scale	Not supported

Required Field Configuration Options

Required Field Configuration Option	Mobile Status	Notes
Required field configurations	Partially supported	Required field validation on submission is supported but it's not possible to show the user if the following fields are required: • Signature Section Comment • Summary Section Overall Manual Rating

Character Limit Options

Character Limit Option	Mobile Status	Notes
Min/max character limit options	Partially supported	Character limit validation on submission is supported. It's not possible to indicate whether users are within or beyond the character limit in real time.

Performance Goal Section

Performance Goal Section	Mobile Status	Notes
View goals	Supported	
Add goals	Supported	
Edit goals	Supported	
Delete goals	Supported	
Item Rating	Supported	
Item Comment	Partially supported	Plain (unformatted) text only. See the Rich Text Editor section in this topic for expected behaviors.
Section Introduction	Partially supported	Plain (unformatted) text only. See the Rich Text Editor section in this topic for expected behaviors.
Section Comment	Partially supported	Plain (unformatted) text only. See the Rich Text Editor section in this topic for expected behaviors.
Item Weight	Supported	
Section Weight	Supported	
Custom Field	Not supported	

Competency Section

Competency Section	Mobile Status	Notes
View competencies	Supported	
Add competencies	Supported	
Delete competencies	Supported	
Item Rating	Supported	
Item Comment	Partially supported	Plain (unformatted) text only. See the Rich Text Editor section in this topic for expected behaviors.
Section Introduction	Partially supported	Plain (unformatted) text only. See the Rich Text Editor section in this topic for expected behaviors.
Section Comment	Partially supported	Plain (unformatted) text only. See the Rich Text Editor section in this topic for expected behaviors.
Item Weight	Supported	
Section Weight	Supported	
Custom Field	Not supported	

Development Goal Section

Development Goal Section	Mobile Status	Notes
View goals	Supported	
Add goals	Supported	
Edit goals	Supported	
Delete goals	Supported	
Item Rating	Supported	
Item Weight	Supported	
Section Weight	Supported	

Development Goal Section	Mobile Status	Notes
Item Comment	Partially supported	Plain (unformatted) text only. See the Rich Text Editor section in this topic for expected behaviors.
Section Introduction	Partially supported	Plain (unformatted) text only. See the Rich Text Editor section in this topic for expected behaviors.
Section Comment	Partially supported	Plain (unformatted) text only. See the Rich Text Editor section in this topic for expected behaviors.
Custom Field	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 it's not possible to show the user if the field is required.
Section Introduction	Partially supported	Plain (unformatted) text only. See the Rich Text Editor section in this topic for expected behaviors.
Section Comment	Partially supported	Plain (unformatted) text only. See the Rich Text Editor section in this topic for expected behaviors.
Section Table	Not supported	

Signature Section

Signature Section	Mobile Status	Notes
Signer Name	Supported	

Signature Section	Mobile Status	Notes
Signature Status	Supported	
Signature Date	Supported	
Section Comment	Partially supported	Plain (unformatted) text only. See the Rich Text Editor section in this topic for expected behaviors. Required field validation on submission is supported but it's not possible to show the user if the field is required.

Goal Competency Summary Section

Goal Competency Summary Section	Mobile Status
View the OCOC rating	Supported
View the calculated overall goal rating	Supported
View the calculated overall competency rating	Supported
Edit the overall goal rating	Supported
Edit the overall competency rating	Supported
View the section comment	Supported
Edit the section comment	Supported

Custom Section

Custom Section	Mobile Status	Notes
Section Introduction	Partially supported	Plain (unformatted) text only. See the Rich Text Editor section in this topic for expected behaviors.
Section Comment	Supported	
Custom Element: Label	Supported	
Custom Element: Text	Supported	

Custom Section	Mobile Status	Notes
Custom Element: Text Area	Partially supported	Plain (unformatted) text only. See the Rich Text Editor section in this topic for expected behaviors.
Custom Element: Date	Supported	
Custom Element: List	Supported	
Custom Element: Integer	Supported	
Custom Element: Double	Supported	
Custom Element: Checkbox	Supported	

Other Features

Feature	Mobile Status	Notes
Continuous Performance Management: View achievements linked to goals	Supported	
Continuous Performance Management: View feedback on achievements linked to goals	Supported	
Attachments (Supporting Pod)	Not supported	
Notes (Supporting Pod)	Not supported	
Ask for Feedback: View responses	Not supported	
Team Overview	Not supported	
Ask for Feedback: Send requests	Not supported	
Stack Ranker	Not supported	
Cache data availability	Not supported	Cache data availability means that users can view cache data while offline.
EZ Rater	Not supported	
Tab permissions	Not supported	

Rich Text Editor (Not Supported)

Rich Text Editor (RTE) or text formatted with an RTE is not supported in mobile performance reviews.

If you're using RTE for comment fields, be aware of the following impacts:

- If text is formatted using RTE on the web, the text is displayed without any formatting when viewed in the mobile application.
- If text is formatted using RTE on the web, and then edited in the mobile application, the formatting is lost in both the web and mobile applications and HTML tags are visible.

12 Usage of HTML or Custom Code Within SAP SuccessFactors Application

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

Consider the following before you add any custom code, java script, CSS & HTML in the SAP SuccessFactors application:

- We do not test the impacts of any custom code. It's unrealistic to account for the unlimited possibilities that using HTML or any other code might present to the end user's browser.
- The code could be exported anywhere within a non-HTML-rendering environment. However, HTML would never work in table reports, Detailed Document Search, or a Competency Library export, because there's no HTML parsing involved.
- You should know that HTML is not supported anywhere in the product, but you can test any customization to determine if the customization function sufficiently for your purposes.
- Some areas of the product actively sanitize or strip out certain code, including java script, which may effectively cause it to break, give errors, or not function at all. This is for security reasons to prevent malicious code, or code that can negatively impact performance, from accidentally or purposely being inserted into the SAP SuccessFactors application.
- Special formatting from programs such as Microsoft Word actually use custom HTML coding when cut and pasted into our application, so pasting content into your forms, competencies, goal plans, can cause unexpected operation and issues.

> ⚠ Caution
>
> You can add custom code and HTML into the system at your own risk. However, you're fully responsible for testing and validating that no unexpected results are impacted by code. Also, SAP SuccessFactors makes no representation to support this code, or commitments to change our product in any way to support the expected functionality you require.
>
> However, you may find that custom code and HTML function for a time and due to our regular product releases or updates, they may break or stop working as expected without warning. SAP SuccessFactors may release new updates to the product that negatively impact your custom code, as again we are not responsible for performing any tests on your code. We also make no commitments to update the product to support the previously working HTML as we don't consider these impacts as a product bug.

12.1 Supported HTML for Performance Management Forms

You can use the following supported HTML formatting to edit Performance Management forms: `p, a, strong, em, u, ol, ul, li, font, img, blockquote`.

Examples of proper HTML formatting:

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

13 Data Protection and Privacy

13.1 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

13.2 Data Retention Management

Identify which data purge function in the *Data Retention Management* tool meets your data protection and privacy requirements.

The *Data Retention Management* tool supports two different data purge functions: the newer data retention time management (DRTM) function and legacy non-DRTM function.

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

If you already use the legacy data purge function as part of your current business process and you are sure that it meets your company's data protection and privacy requirements, you can continue to use it, as long as you aware of its limitations.

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

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

In the longer term, we recommend that you also consider adopting the newer solution. In the meantime, to use legacy data purge, please refer to the guide here.

14 Check Tool in Performance Management

14.1 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 318]
Using the Quick Fix Feature [page 323]

14.1.1 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.

14.1.2 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.

14.1.3 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

14.1.4 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.

> **i 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.

> **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 321]

14.1.5 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.

14.1.6 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.

14.1.7 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.

14.1.8 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.

14.2 Important Notes About Get Form Template Rating Permissions Check

The *Get form template rating permissions* check allows you to identify which rating option and field permissions are configured in a section within a form template. You then understand how the configured field permissions work differently from the expected behaviors of a specific rating option.

There are four rating options supported in Performance Management, which affect whether a role can view or edit a certain rating field in the form. Based on the rating option and field permissions you've configured for a template section, the following table shows the possible check results about check item, check message, and validation point. The Check Item column shows the fields for a rating option. The Check Message column gives you an explanation as well as suggested field permissions for a rating option, while the Validation Point column contains the permissions that you've configured.

> **→ Remember**
>
> This check returns the field permissions that have been explicitly defined in field, role, and type within a template.

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

Rating Option	Check Item	Check Message	Validation Point	Additional Note
1	`item-rating` and `item-cmt-rating`	Everyone is able to edit the rating of record field (`item-rating`) until the fields are permissioned. For users updating the rating of record field, the last user in the route map with permission to this field will provide the final rating of record for the item. In addition to the rating of record field, the employee is also able to edit the unofficial user rating field (`item-cmt-rating`).	A write permission set in `item-cmt-rating` and `item-rating`. The ideal configuration for the employee role is to grant read or none permission to the rating of record field (`item-rating`) which will prevent the employee from providing the rating of record (`item-rating`) as well.	• Currently, the validation point will show up, only when a role has been granted a write permission in both `item-cmt-rating` and `item-rating`. You can also find the ideal configuration in the Validation Point. • The availability of comment rating field is not only decided by rating option and its field permissions, but also by comment settings. For example, if the user has a permission to give comment rating, but the comment field is not configured, then he or she still cannot access the comment rating field.

Rating Option	Check Item	Check Message	Validation Point	Additional Note
2	`item-rating` and `item-cmt-rating`	Everyone is able to edit both the rating of record field (`item-rating`) and the unofficial user rating field (`item-cmt-rating`) until the fields are permissioned. With Rating Option 2, configuration of the roles that determine the rating of record is accomplished by putting permissions on the rating of record field.	A write permission set in `item-cmt-rating` and `item-rating` for the following roles: XXX	• Currently, the validation point will show up, only when a role has been granted a write permission in `item-cmt-rating` and `item-rating`. • The availability of comment rating field is not only decided by rating option and its field permissions, but also by comment settings. For example, if the user has a permission to give comment rating, but the comment field is not configured, then he or she still cannot access the comment rating field.

Rating Option	Check Item	Check Message	Validation Point	Additional Note
3	`item-rating` and `subject-item-rating`	One rating field appears for the subject of the form that only the subject can access. This is referred to as the `subject-item-rating`. Another rating appears for the manager, and this rating field can only be accessed by the manager. This is also known as the rating of record or `item-rating`, which is only displayed and can be written into by the EM role. The `subject-item-rating` field is displayed and is editable only by the subject of the form.	N/A	

Related Information

Rating Options [page 51]

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