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| 1. | **What are performance forms used for?** | To record information, such as the evaluation of an employee's performance. |
| 2. | **What term should you use when referring to talking about performance form configurations?** | Form templates |
| 3. | **What is a performance form template?** | A shell that contains the structure, or layout, of the performance review form. |
| 4. | **Performance Form Templates contain the following components:** | Rating scale<br>Route map (form workflow)<br>Form title<br>Form sections |
| 5. | **What are permissions based on?** | The relationship of the viewer of the form to the subject of the form (the employee being reviewed). |
| 6. | **Who is the subject of the form?** | The employee. |
| 7. | **Roles not tied to the employee's hierarchy, like the Originator of the form or a specific User, can be defined where?** | In the Route Map. |
| 8. | | In the form template. |

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| | **Where are permissions controlled for a Performance Management form?** | |
| 9. | **What happens to form templates created in the older versions?** | They can be upgraded to PMv12A using Manage Templates |
| 10. | **Route maps** | Establishs the workflow and steps that users follow during the performance review process. They specify the order in which a form moves from one user to another, and what actions users can take at each step in the process. |
| 11. | **Two main elements of route maps** | Stages and steps |
| 12. | **Stages** | Specifies the type of action employees can perform. Forms go through three main stages: Modify, Signature, and Completion. |
| 13. | **Steps** | Specifies which employees receive the form and what the employee is expected to accomplish. |
| 14. | **3 main stages:** | Modify, Signature, Completion. |
| 15. | **What happens if the step description is left blank?** | The step Name will be used for the "To Do" list. |
| 16. | **Step type** | Describes the way the form is routed. |
| 17. | **Step types** | Single Role, Iterative, Collaborative |
| 18. | **Single Role** | |

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| | | Assigns the form to a single role or user. This step type is used if you want only one user to have an assigned action in this part of the process. |
| 19. | **Iterative** | Assigns the form to a group of people. This step type allows multiple users to send the form back and forth to each other before moving on to the next step. Users have a clear definition of who has the form in their inbox for editing and review, and who it will be routed to next. |
| 20. | **Collaborative** | Assigns the form to two or more users at the same time. With this step type, the form is in the inbox of all the collaborative step participants at the same time. However, only one user can make edits at a time. If the form is being edited by one of the collaborative step participant or if it has not been closed using the Save and Close button and another participant tries to open the form, a lock out message will be presented to the user. The lockout period is 60 minutes. |
| 21. | **What's the difference between Iterative and Collaborative steps in terms of reviewer roles?** | Iterative Steps have Entry and Exit Users while Collaborative Steps only have Exit Users. |
| 22. | **Date fields** | Can be defined in the route map to configure and control when the form moves from one step to the next. |
| 23. | **Start Date** | The date when the specific step starts. |
| 24. | **Exit Date** | The date before which the step cannot be completed. |
| 25. | **Due Date** | The date the step is due to be completed. |
| 26. | **Enforce start date** | This will lock the form in read-only mode until the enforced start date is reached. |

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| 27. | Automatic send on due date | This will automatically forward the form to the next step on the due date. |
| 28. | If you want to only send forms that pass the form validation check | Select "Only send forms that pass validation". |
| 29. | To send all forms regardless of whether they pass validation | Select "Always send regardless of validation". |
| 30. | Step ID | The unique identifier of the step in the route map. |
| 31. | What's the Step ID used for? | Used by consultants in configuring permissions on a form template through XML The final step in the route map, usually called the Completion step, does not have a step ID. |
| 32. | Start of Review option | Identifies the beginning of the performance review process. This is generally set to the first step of the route map. The main function of this feature is to identify when a form is added to the Team Overview page. This ensures Team Overview is made available to the direct managers and/or to the matrix or HR managers if they are involved in the workflow. |
| 33. | Out of Turn Access (OOTA) | In Advanced Options allows roles to access a copy of the form via Team Overview before the form officially reaches them. |
| 34. | How can all performance review forms be centralized into one account? | By setting up a dummy user or technical user account. |
| 35. | Most common rating scale: | 5 point rating scales, but we can configure the rating scales with as maany points as customer needs. |

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| 36. | **How do you generate scores that increase incrementally?** | By entering the minimum number in "Low", maximal number in "High" and the increment in "Increment". |
| 37. | **7-Point Scale** | This type of scale offers the highest level of differentiation, and may be helpful when extreme accuracy is preferred over convenience. |
| 38. | **5-Point Scale** | Default rating scale type. This type is recommended because it contains a midpoint and allows for a balanced level of differentiation. |
| 39. | **4-Point Scale** | This type of scale lacks a neutral midpoint, and so evaluations tend to be artificially skewed towards one end of the scale or the other. |
| 40. | **3-Point Scale** | This type of scale is applicable if you would like the result to be divided into two polar points or the neutral one. |
| 41. | **Job Description Manager (JDM) is also known as?** | Families and Roles |
| 42. | **Competencies** | The basic abilities employees must have in order to perform their role successfully within the organization. |
| 43. | **Two categories of competencies** | Core Competencies and Job-Specific Competencies |
| 44. | **Core Competencies** | Competencies that are core to the organization. The Performance Form and 360 Review Forms can be configured to pull these competencies for all employees. |
| 45. | **Job-Specific Competencies** | |

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| | | Competencies that are specific to the role or job of the employee. Competencies can be mapped to the role and job code of the employee and dynamically displayed on an individual's Performance and 360 Review Forms. |
| 46. | **Competencies Versus Goals** | Competencies describe what is expected to perform the job, such as skills and attributes. Competencies are how someone performs the job.<br><br>Goals describe what is to be accomplished, and typically include metrics and targets. |
| 47. | **Where do competencies reside within?** | Competency libraries. |
| 48. | **How many competency libraries can be in each company instance?** | Several. |
| 49. | **Competencies are used and displayed in:** | Performance Forms, 360 Review Forms, Development Plans, Career Worksheets, SAP SuccessFactors Succession and Reports |
| 50. | **A competency consists of:** | A name and description. |
| 51. | **Each competency is created in?** | A competency category |
| 52. | **Each competency is created with:** | An ID and GUID. |
| 53. | **Competency Attributes** | Defines each competency. |

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| 54. | **Global Unique Identifier (GUID)** | The identifying number that ties all competency versions within the competency library. |
| 55. | **Status** | Each competency can have a status of Editable, Read-Only, or Hidden. |
| 56. | **Performance details** | Are short but specific statements that describe actions, attitudes, or skills that demonstrate proficiency in the competency at a specific performance level. |
| 57. | **The Writing Assistant has the following features:** | Provides guidance on suggested comments within the Performance Review and 360 Review forms.<br><br>You can access it within the standard competency libraries, and you can create it for custom competency libraries.<br><br>When you turn it on for a section, users can see the Writing Assistant inside the performance form's competency section(s). |
| 58. | **The Give Advice tab is also known as?** | Coaching Advice. |
| 59. | **What does the Give Advice tab do?** | Provides guidance relevant to the competency being rated. It offers developmental suggestions and concepts that address a defined problem or encourage an employee's strength. |
| 60. | **Competencies and skills mapped to a job role are:** | Job-specific. |
| 61. | **If Job Description Manager (JDM) is enabled, competencies are:** | Mapped in legacy Families and Roles. |

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| 62. | **How do you map comptencies in Families and Roles if JDM is enabled?** | Go to Manage Job Roles. |
| 63. | **If Job Profile Builder (JPB) is enabled:** | Competencies and skills are mapped in the JPB tool. |
| 64. | **How do you map competencies and skills using JPB?** | Go to Manage Job Profile Content. |
| 65. | **Talent Intelligence Hub** | Enables organizations to maintain people attributes that are critical for their success. |
| 66. | **Attributes Library** | A repository that allows organizations to define attributes they expect in their people. |
| 67. | **Growth Portfolio** | A unique repository where employees can store their role-specific and person-specific attributes. |
| 68. | **How are attributes grouped in an Attribute Library?** | They are grouped into individual categories based on the attribute type. |
| 69. | **Attributes section** | Includes a menu to search for attributes, filtered by name, attribute type, status,tags, ID, etc. Attributes competencies and skills can be pulled into the attribute section on the Performance and 360 Reviews Forms. |
| 70. | **Attribute Types section** | Displays the available attribute types, like Competency, Skill or Language, and you can see how many attributes exist per each type. There are also searching options available, and new attribute types can be created or edit the existing ones. |

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| 71. | **Behaviors section** | Displays the available behaviors from associated attributes, like competencies. There are also searching options available and new behaviors can be created or edit the existing ones. |
| 72. | **Tags section** | Displays the available tags which are used to categorize attributes in Talent Intelligence Hub. The content migrated from JDM or JPB/CoC, such as the Competency Libraries (that included categories and groups) are now converted into Tags. Additional tags can be created. |
| 73. | **The three standard tags** | Core, Critical and Trending. |
| 74. | **Proficiency Settings section sub- options** | Raating Scale and Rating History |
| 75. | **Rating Scale in Proficiency Settings** | From this menu, rating scales (referred to as Proficiency Level Scales) can be created and edited, as well as being associated to one or more attribute types. When creating a new Proficiency Level Scale, you can define the number of levels (like a 5-point scale will have 5 levels) and determine if the lowest level value will be 0 or 1, if a Too New to Rate value should be included and provide each level names and descriptions. |
| 76. | **Rating History in Proficiency Settings** | From this menu, you can select one or more forms to assign the appropriate rating history type. |
| 77. | **The 3 types of rating history type:** | Performance, Proficiency, and None. |
| 78. | **Rating History Type: Performance** | If the attribute is associated with a Performance form template, the attribute is marked as Unrated |
| 79. | **Rating History Type: Proficiency** | If the attribute is associated with a Proficiency form template, the proficiency ratings for the attribute are normalized based on the proficiency level scale you configured. The attribute along with its normalized ratings is displayed |

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| | | in the Growth Portfolio. If an attribute is associated with forms of both Proficiency and Performance template types, the ratings in the Performance form template aren't considered. Instead, the latest assessed ratings from the Proficiency template are normalized and displayed in the Growth Portfolio. |
| 80. | **Rating History Type: None** | If the rating history type is set to None, the proficiency ratings provided in the Performance Management forms are not considered. |
| 81. | **Portfolio Settings section** | Administrators can enable/disable Growth Portfolio for the organization. |
| 82. | **What are three ways to create a performance management template?** | 1. Add a template from the SuccessStore.<br>2. Copy an existing template.<br>3. Upload a new template. |
| 83. | **What is best practice for creating a performance management template for a new review cycle?** | Copy an existing template. |
| 84. | **What are three ways to configure form templates?** | 1. Using Manage Templates.<br>2. In an XML editor and uploading to Form Template Settings in Provisioning.<br>3. Directly in Form Template Settings in Provisioning. |
| 85. | **General Settings section** | Where you can define the foundational pieces of the template. |
| 86. | **What can you do in the General Settings section?** | Edit the name, description, and select the workflow (route map), and rating scale. |

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| 87. | **What's the difference between configuring the rating scale in "General Settings" versus "Manage Templates"?** | The rating scale for the entire form is selected in General Settings while the rating scales can be configured per section in Manage Templates. |
| 88. | **Advanced settings is also known as?** | Form Template Settings |
| 89. | **Are the configuration options the same within each type of section in the Performance Form template?** | No, the config options within each type of section differs. |
| 90. | **What will happen if you try adding a section type that can only be added to a template once?** | Instance: system will not allow you to create duplicates of those section types.<br>XML: template will not validate. |
| 91. | **What do you need to change to ensure all sections appear in the desired order on the form?** | Change the <fm-element index> of this and all the other sections. |
| 92. | **<fm-sect-config> tag** | Describes basic settings for each section. |

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| 93. | **Section Comments** | The comment box at the end of each section.Appears for most sections if comments are enabled. |
| 94. | **What other type of comment appears besides section comments for Goal and Competency (Attribute) sections?** | Item comments. |
| 95. | **During what stage are comment boxes displayed?** | During the Signature Stage. |
| 96. | **What are item comments only applicable for?** | Goal and Competency sections. |
| 97. | **If a different rating scale needs to be used per ratable section, what do you do?** | It can be selected at each section using the Rating Scale dropdown option from Manage Templates or in XML using a code below the <sect-weight-4-objcomp-summary> element. |
| 98. | **rating-opt attribute** | Determines how ratings are solicited on a form. |
| 99. | **What section attribute controlls the option to add a section item in the XML template for both** | Configurable |

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| | goals and attribute sections? | |
| 100. | Configurable | Competencies, skills or goals can be added to (or deleted from) the section on an ad hoc basis. |
| 101. | configurable="true" | An Add Competency, Add Skill or Add Goals (depending on the type of section) button appears in the section and trash bin icons next to the items. |
| 102. | configurable="false" | Buttons are not visible. |
| 103. | Which section is best for weighting to be used in? | Only in teh goal section. Weighting tends not to be used in an attribute section, as it makes the overall evaluation score too granular. |
| 104. | Core competencies are displayed based on what? | On the competencies marked as "core" in the competency library. |
| 105. | How are Job Specific Competencies populated? | Populated dynamically based on employee's job code. |
| 106. | What must you do if you want to add links into the HTML editor in the instance? | You must set the targets that define where those links open in the XML. |
| 107. | What is best practice for links to external websites? | To have them open in a new window. |

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| 108. | What is best practice for links to the SAP SF system? | To have it open in the same window or tab. |
| 109. | Type | Indicates the kind of information that displays for this item. |
| 110. | EKey | Element where the required data item must be entered. |
| 111. | Goal section types | Performance Goal section and Individual Development Goal section. |
| 112. | What's the Goal Section linked to? | A Performance Goal Plan (TGM) |
| 113. | What's an Individual Development Goal Section linked to? | Development Plan (IDP) |
| 114. | What does the Development Plan require? | Requires a Career Development Planning (CDP) Full License. |
| 115. | What are two ways to populate the goals to a Performance Form? | Auto-populate and auto-sync. |
| 116. | Auto-populate | When enabled, existing goals from the goal plan are transferred to the performance form automatically on creation. |
| 117. | If you create goals after creating the form, what happens? | Goals are not automatically added to the performance form. |

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| 118. | **Auto-sync** | Completely synchronizes goals between the Goal Plan and the performance form. All goals added, changed, or deleted after the initial performance form is created are automatically updated each time you open the form. |
| 119. | **When can auto-sync only occur for?** | Forms in a "modified route map" step. If you change goals during the '360 Degree Evaluation', 'signature,' or 'completed' steps, they are not updated when the Goal Plan is changed. |
| 120. | **When is auto-sync not recommended?** | For forms that pull goals into multiple goal sections of a performance form. |
| 121. | **What happens when you use auto-sync on forms that pull goals into multiple goal sections on a performance form?** | The actual goal moves to a different section in the form, but existing ratings and comments do not and will be lost. |
| 122. | **What is the default for populating goals automatically?** | Auto-populate. |
| 123. | **Goal Management-Performance Management (GM-PM) Sync Up** | When enabled, Goal Management (GM) will "push" the changes to Performance Management (PM) so that the PM module will not miss it. |
| 124. | **What happens when GM-PM Sync Up is not enabled?** | If the PM form was not opened/saved since the last modification on GM, the update would not be included in the form. |

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| 125. | **Two issues if GM-PM Sync Up isn't enabled** | 1. PM fetches the goals from GM once a form is opened, and keeps a local copy in PM, which might later be used by Variable Pay. If the PM form was not opened since the last modification on GM, Variable Pay will not be able to get the up-to-date GM data.<br><br>2. Form reports are generated based on the "feedback table" in PM. PM only updates this table once a form is opened. In case the PM form was not opened since the last modification on GM, the report might include expired GM data. |
| 126. | **Show "Add Existing Objective" Button** | This configuration is used only when goals are auto-populated. If a goal is added to the goal plan after the performance form is created, selecting this button allows users to pull the new goal(s) into the performance form. |
| 127. | **Official Raating of Goals** | Rating field that everyone shares. |
| 128. | **How do you configure selective addition of goals?** | Only in the XML template. |
| 129. | **Where can you enforce limits for weights and where can't you?** | You can enforce limits for weights on the performance form, but you cannot enforce limits for those weights on the goal plan. |
| 130. | **lock-item-weights attribute** | Controls whether a user is able to edit the item weights on the form. |
| 131. | **What is the competency section also known as?** | The attribute section if the instance is migrated to Talent Intelligence Hub. |
| 132. | | One or more. |

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| | How many attribute sections can a form have? | |
| 133. | How many times can each attribute ID appear in a form? | Only once. If there is an overlap, the attribute only appears in the first (topmost) section of the performance form. |
| 134. | Attribute sections can begin in one of the following ways: | Blank, in which case the user manually adds the attributes to be reviewed.<br><br>With relevant attributes already identified and listed in the form. |
| 135. | Job Specific Attributes | Attributes that are mapped to the role or job code of the employee can be automatically populated in an attribute section. |
| 136. | In regard to Job Specific Attributes, what happens if the user's job code changes and new attributes should appear on the form? | A new form must be created. |
| 137. | Core Attributes | Competencies that are marked as core in the competency library or categorized as Core (in Talent Intelligence Hub), as well as Skills categorized as Core, can be automatically populated in an attribute section. |
| 138. | Custom Attributes | Attributes can be hard-coded into a performance form template as Custom Attributes, so they always appear for all employees. |
| 139. | Ad Hoc Attributes | You can allow the addition of attributes on an ad hoc basis. When this has been set, users see the Add Attributes button in that section and can add attributes from the Talent Intelligence Hub. |

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| 140. | **What happens if you enable ad hoc attributes together with hard-coded or job-specific attributes?** | End users can add attributes in addition to the ones that populated based on the configuration. |
| 141. | **Competency ID** | A unique identifier for a competency and is used to define the competencies to be populated. |
| 142. | **Global Unified Identifier (GUID)** | A unique number that ties the same competency in different languages together and identifies them as being identical. |
| 143. | **When is a competency ID used?** | When hard coding competencies. |
| 144. | **When is a GUID used?** | When a company has multiple locales. |
| 145. | **When do you use the ID?** | If your language is English, use this regardless of whether or not language packs are enabled. |
| 146. | **When do you use the GUID?** | If your language is not English and language packs are enabled.<br><br>If the customer has language packs installed, and has modified the competency library in the appropriate languages. This means the IDs and GUIDs are no longer in sync. |
| 147. | **Before the attributes (competencies and skills) can be populated by job code, you must ensure the following** | 1. The employee data file must have job codes for each employee.<br><br>2. Job roles must be set up with the exact job codes as appear in the data file.<br><br>3. Competencies and skills must be mapped to those roles. |

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| | three prerequisites are met: | |
| 148. | Index | Locattion of the section in the template. |
| 149. | Removable set to "true" | Any permissioned user is able to remove the competency or skill. |
| 150. | Removable set to "false" | No user can remove that attribute. |
| 151. | Attributes that control ability to rate: | no-rate and rating-opt. |
| 152. | no-rate="false" | All users can rate the item within the section. |
| 153. | rating-opt | Attribute controls how the rating box appears and can be further controlled by permissioning. |
| 154. | Expected ratings | Provides insight into how the employee should be performing based on a defined job role or job profile. |
| 155. | How are expected ratings used? | To help calculate the gap between expected and actual performance. |
| 156. | If no item weights are used, how is it weighted? | Each item is equally weighted. |
| 157. | Calculated Overall Rating | Determines the score of each of the sections based on the ratings and item weights within the section, and then determines the overall score by appyling the weights of each section to its scores. If weights for items do not total 100%, then they are normalized during the calculation of this score. |

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| 158. | **Manual Overall Rating** | Allows the manager or permissioned role to override the calculated score. |
| 159. | **If enabled, what can be the rating of record?** | The manual rating. |
| 160. | **Two options to ensure that a subject has an overall score when the form is completed:** | 1. Set override-unrated="true" in the <summary-sect> element attributes. When set to "true", the rating of record defers to the overall calculated rating.<br><br>2. Make the Manual Overall Rating required before the form can be sent to the next step through permissioning. |
| 161. | **Objective Competency Summary section** | Will calculate two overall scores independent from each other, an overall objective, and an overall competency rating. |
| 162. | **What is the Objective Competency Summary section also known as?** | Obj/comp or HOW versus WHAT summary. |
| 163. | **What are the 3 reasons to enable the How vs What matrix?** | 1. Display matrix in Calibration.<br>2. Display employees in the Succession Matrix Report.<br>3. Display overall ratings in People Profile. |
| 164. | **How many times can custom sections be added?** | As many times as you need them. |
| 165. | | 9 different field types. |

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| | How many different field types can custom sections have? | |
| 166. | For each custom field, four elements must be defined: | Element key, element name, element type, element value. |
| 167. | What's the default permission of a performance form? | Write and Enabled. Everyone can view, edit, and take all available actions. |
| 168. | What is the exception for default permissions of a performance form? | Required field permissions which do not exist without enabling in the form. |
| 169. | What do you need to do first with default permissions? | Remove default permissions for all roles at all route steps. |
| 170. | You should remove permissions from sections by what instead of using the asterisk to avoid removing fields and sections from the Completed route step? | Remove permissions from sections by NAME. |
| 171. | What will happen if permissions have al- | Any existing permissions associated to those IDs will be removed. |

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| | ready been creaated and you change the Step ID? | |
| 172. | When configuring a button permission, the following need to be defined: | 1. The Type of Button Permissions.<br>2. The buttons or pods being permissioned.<br>3. The roles the permission applies to.<br>4. Route steps populate from the route map that is associated to the form template in General Settings. Any route step may be selected. |
| 173. | Get Feedback | If permissioned, the subject of the form could use this button to find another user in the system and get feedback. |
| 174. | Ask for Feedback | Functionality gives the ability to ask general feedback to several users at the same time, internal users as well as external users. |
| 175. | Where you can you ask for feedback? | In "Team Overview" |
| 176. | Team Overview | A dashboard where users can keep track of where employees are in the progress of reviews, and they have the ability to loop in another person to give feedback on that employee. |
| 177. | What are the two permissions for "Ask for Feedback data in Supporting Information Pod Permissions"? | None or Read. |
| 178. | Others' Rating Tab Permission | Allows you to define who has access to view the other person's ratings on the form side-by-side to his or her own ratings. |
| 179. | | Defines access on a field level within the Other's Rating tab. |

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| | others-rating-tab-item-permission | |
| 180. | What sections can the others-rating-tab-item-permission be defined in? | Can be defined in each goal (objective), development, or competency sections. |
| 181. | Tab permission | Grants the end-user the ability to view different tabs on an item in a goal or competency section. |
| 182. | Where are tab permissions configured? | Only in XML. |
| 183. | Section permissions | Determine whether a user can see the section during route map steps. |
| 184. | Action permissions | Used to define two actions in the goal and competency sections: add item and remove item. |
| 185. | Field permissions | Used to remove or grant access to specific fields within a section. |
| 186. | Goal Plan State Permissions | Used to automatically change the goal plan state when an action is triggered in the performance form. |
| 187. | Required field permissions | Requires any existing field to be completed prior to sending the form to the next route step or signing the form. |
| 188. | Design aspects of the performance form template: | Title, workflow, cycle, key players, process steps. |

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| 189. | **What should the form template title be?** | Descriptive of the form and easy for users to understand. |
| 190. | **What two scores are plotted to determine the quadrant in which an employee falls on the performance-potential chart?** | 1. an overall Performance score<br>2. an overall Potential score |
| 191. | **Launch Forms tool** | Allows administrators to mass create forms for several people in the organization, even for all the active and inactive users in an organization. |
| 192. | **What should you do if you find an error during the testing process?** | Stop, delete the current form, and fix the error. When the error is fixed, start the test with a new form. |
| 193. | **When you delete a form, where is it removed from?** | The front end of the system. |
| 194. | **When you restore a form, where is it restored to?** | To the system at the routing step it was in when it was deleted. |
| 195. | **Employee Import function** | Used to import new user data if an event occurs that causes a change. |
| 196. | | The form moves as specified by that setting. |

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| | If a checkbox is selected during import but the form template settings do not match, what is the result? | |
| 197. | If a checkbox is not selected during import, what is the result? | The settings at the form level are ignored and the form does not move. |
| 198. | Change Engine | Allows you to manage forms for changes such as manager change, job code changes or location changes. |
| 199. | Signature Stage and Completed Documents Routing | Allows the administrator to use administrative controls to force documents to the next stage in the route map. |
| 200. | Form Status Workflow | A chart where you can select different statuses. When selected, a list with the users involved displays below the chart, along with additional columns containing more data. The columns with the data that displays is configurable. |
| 201. | Delegation feature | Managers in the organization can delegate their performance review tasks to other people within a specified time period. It also allows administrators to create delegations on behalf of managers. |
| 202. | What parameter can be set for delegation requests? | There's a parameter that can be set to determine when a delegation request for Performance Reviews should be automatically canceled if the delegatee does not accept or declines the request. |
| 203. | Initiator | |

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| | | Someone who initiates a delegation by creating a delegation request. An initiator can be the delegator themselves, or an administrator who creates a delegation on behalf of the delegator. |
| 204. | **Delegator** | Someone whose task is delegated to someone else. In the context of performance reviews, delegators are usually managers. |
| 205. | **Delegatee** | Someone who is delegated with a task, like matrix managers or another manager that can act on behalf of a manager not available. |
| 206. | **Employee** | The subject user of the delegated task, typically direct reports whose forms are reviewed. |
| 207. | **Team Overview filter** | Allows users to filter individuals in their Team Overview based on their relationship to the reviewer. |
| 208. | **Stack Ranker** | Also known as My Team Rater, allows managers to rank and view their direct reports' competency rankings and overall ratings next to each other. |
| 209. | **What is Stack Ranker only compatible with?** | Competencies |
| 210. | **What is Stack Ranker not compatible with?** | Behaviors. |
| 211. | **What does enabling rich text editor (RTE) on performance form templates using Stack Ranker allow us to do?** | Use Writing Assistant, Legal Scan, and Spell Check. |

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| 212. | **What are the two modes of Latest Veresion of Stack Ranker?** | View Mode and Edit Mode |
| 213. | **Calibration** | The process organizations use to compare and adjust the ratings of their team to ensure performance levels are standardized across the organization. |
| 214. | **Facilitator** | Facilitates the session. This is typically an HR representative. The facilitator is a neutral person responsible for managing the session and ensuring that the information required to calibrate employee ratings is available. |
| 215. | **Subject** | The employee whose ratings are being calibrated. |
| 216. | **Participant** | The manager of the subjects being calibrated (EM). Participants other than the owner's direct reports can also be selected to participate in the session. |
| 217. | **Owner** | The manager of the participant (EMM). The owner's direct reports are automatically made participants in the session, and the direct reports of the participants are automatically made subjects. The owner ensures that all managers reporting to them use the same metrics for rating their team members. |
| 218. | **Executive Reviewer** | A business or HR executive who does not necessarily have to be present for each Calibration session, but rather needs blanket access to the data across all sessions for a given Calibration template used in a talent management cycle. |
| 219. | **A calibration session is created based on what?** | A Calibration template. |
| 220. | | Overall Goal and Competency ratings. |

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| | What ratings are used to compute the Obj/Comp Summary section? | |
| 221. | What must be configured to display the HOW vs WHAT matrix in Calibration? | The Obj/Comp Summary section must be configured. |
| 222. | What must be enabled for the drag and drop functionality in the HOW vs WHAT matrix in Calibration? | Manual overall ratings. |
| 223. | Dashboard view | Provides a high-level overview of the calibration session |
| 224. | List view | Lists all the employees in the calibration session |
| 225. | Calibration view provides users an at-a-glance overview of the following information: | Bin views and Matrix view. |
| 226. | Bin views | Display employees by ratings distribution. You must enable Manual Overall Rating for this to work. |
| 227. | Matrix view | Graphically displays employees on a matrix grid report, based on data selections made during calibration setup. |

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| 228. | **Before calibration can be used with Performance Management forms, the following requirements must be met:** | The route map must have at least one edit step for calibration, which is not Iterative. Single and Collaborative steps are supported.<br><br>You must enable manual ratings in the form template that contains the elements you want to calibrate (Overall Performance Rating, Overall Goal Rating, Overall Competency Rating, etc) in order to be able to adjust ratings in the Calibration session.<br><br>You must associate a valid rating scale with these ratings. |
| 229. | **The default is to only give the ability to change the ratings to which two roles in Manage Calibration Settings?** | Only give the ability to change the ratings to the facilitators and co-facilitators with the Write permission. |
| 230. | **Executive Review** | A feature that only users with special permissions can use to access aggregated graphs and session details for this template. There are multiple types of graphs and information you can show. |
| 231. | **The permissions to see the Executive Review page does not come from role-based permissions, but from where?** | Manage Permission for Executive Review |
| 232. | **What can you see/do in the Executive Review?** | Adjust ratings and see standard rating distribution graphs, 9-boxes, and additional chart data that's considered sensitive. |

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| 233. | **Which rating records are used for calibration sessions?** | Only the rating records that fall within the Calibration Template Review Period. |
| 234. | **If an employee has 2 rating records from 2 identical forms, which will the system choose?** | The form which was launched last, which is the form with the highest document ID number. |
| 235. | **Basic Info tab** | You can define the template name and the review period. |
| 236. | **Review period** | Performance evaluation period to be calibrated. |
| 237. | **What controls the data that is pulled into the calibration session?** | The review period date range. |
| 238. | **What two types of distributions can be set for calibration distribution?** | Percentage or Numerical. |
| 239. | **Percentage Distribution Guideline** | Distributions can be set as % among the subjects based on the ratings provided, and can be set using different operators besides =, such as <, <=, >, >=, and is between. Typically, the total distribution should add up to 100% if using = operator (where specific values of distribution are set for each rating). |
| 240. | **Numerical Distribution Guideline** | Enables you to specify the target number of subjects you want to assign to each Performance rating. Use operators = and ranges from...to. |
| 241. | | |

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| | **What makes a matrix view one-dimensional versus two-dimensional?** | If only the X-axis is defined the view is a one-dimensional bin view. If both the X-axis and Y-axis are defined the view is a two-dimensional matrix view. |
| 242. | **What are the 4 different categories of the Advanced Tab of the Calibration Template?** | General, Restrict Calibration role Access by Target Population, Comment on Change of Ratings, Calibration History Portlet. |
| 243. | **Calibration History Block** | An optional feature that can be configured to display on the profile. This block will display up to five rating types and up to three matrix grid views from Calibration sessions. |
| 244. | **What are the three tabs that must be completed to calibrate the session?** | Basic Info tab, People tab, and Validation tab. |
| 245. | **When a user's form is not yet in the calibration step or if a user does not have a form at all, what happens?** | The user will be removed from the session upon activation. |
| 246. | **People Tab** | Defines the users involved in a calibration session. In this tab, the owners, participants, and subjects of the calibration session can be modified. |
| 247. | **What do you need to select in order for** | Select the "Select subjects and participants automatically according to the owners" option on the Basic Info tab. |

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| | **the People tab to pre-populate?** | |
| 248. | **What are the ways to aadd participants and subjects in the People tab?** | Manually by using the filters and Search button, using the Org Chart, or using the Dynamic Groups select users. |
| 249. | **If you want to add fields to the list of filter options in the Search By Filter option, where do you navigate to?** | Succession Data Model. |
| 250. | **What's the default threshold for bulk finalizing calibration sessions?** | 25 sessions. |
| 251. | **How do you edit an existing calibration session?** | Go to Manage Calibration Sessions, select the template, and if the session is already activated you will needto deactivate it. Make the changes, save, and reactivate (if desired). |
| 252. | **How do you reverse the action of deleting an existing calibration session?** | This action cannot be reversed. |
| 253. | **Prerequisites to reopen a finalized calibration session** | Reopen permission needs to be granted in Manage Calibration Settings ' Permissions. This is only available for the facilitator and co-facilitator, but not for the other calibration roles. |

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| | | A notification can be enabled, as an optional step, to notify those roles involved in the session that it will be reopened. Navigate to Email Notification Template Settings and ensure the Notify Calibration Participants of Session Reopening notification is enabled.<br><br>Sessions can be reopened from the Calibration menu. |
| 254. | **Which two roles are the only two you can grant the Re-open permission to for calibration sessions?** | The facilitator and co-facilitator. |
| 255. | **Can the calibration settings allow you to set read and write permissions for facilitators, owners, participants, and co-facilitators, both during the session and after the session has been approved?** | Yes. |
| 256. | **Remove Subjects from Calibration Sessions** | Available to search for sessions where an employee has been included as a calibration subject. Administrators can easily search by Subject (required) and Template (optional) . From the results, you can select from all sessions based on a Calibration Template (or Templates), and remove the subject. |
| 257. | **What types of session statuses can a** | Both, regardless of the status (setup, in-progress, approved, or deactivated). |

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| | subject be removed from (inactive or active or both?) | |
| 258. | When are calibration email notifications sent out? | Automatically when calibration events occur. You can disable these notifications. |
| 259. | Which email notification template for calibration cannot be deactivated? | "Notify Calibration Rating Changes during Session Finalization". However, the customer can choose for which calibration template this notification will be used. |
| 260. | Text replacement feature | Enables you to replace the default UI labels on the application with the labels of your choice. |
| 261. | Manager-Initiated Calibration Sessions | Managers can create team-specific sessions that match their business cycle and organizational development needs, for their direct reports or lower levels of reports. |
| 262. | Managers using the Manager Calibration Sessions function should have at least how many levels of direct reports? | One level. |
| 263. | Key Features of Continuous Performance Management | Better project tracking, structured and meaningful one-on-one discussions, links activities to the goal plan, helps managers track their team members. |
| 264. | | Metadata Framework (MDF) |

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| | What platform functionality does Continuous Performance Management use? | |
| 265. | How do you import the necessary MDF files when you enable CPM? | They're automatically imported from SuccessStore when you enable 'Continuous Performance Management' in the application. |
| 266. | Configuring email for feedback notifications requeries that you enable what from Upgrade Center? | Intelligent Services |
| 267. | The Admin Access Permission to all Continuous Performance Management Data has been developed exclusively for what role? | Data Protection Officer (DPO). |
| 268. | The tool used to configure Continuous Performance Management: | Administrative Console |
| 269. | Activity | |

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| | | An entity that enables the employee to track the items that they are working on. |
| 270. | **What can activities be linked to?** | The performance or development goals. |
| 271. | **How can pending feedback requests be accessed?** | From the Feedback Request engagement cards on the Home Page, from the To-Do panel, or through the link on an email notification. |
| 272. | **Requestees can read the feedback request and are informed about who will be able to view their response. There are two options for this:** | Responses to feedback requests made by an employee will be only visible to the employee.<br><br>Responses to feedback requests made by managers about an employee will be visible to both employee and manager. |
| 273. | **Accessing and reviewing returned feedback depends on two types of feedback:** | Review Feedback on a Specific Employee Activity and Review General Feedback on an Employe. |
| 274. | **One notable feature of AI-Assisted Writing** | The ability to make feedback actionable, providing constructive suggestions that employees can take immediate action on. |
| 275. | **360 Reviews** | Help to identify employee blind spots and hidden strengths to guide development, be used as a multi-rater assessment that can factor into an employee's formal performance review, and can coincide with the performance review cycle or off-cycle as a completely separate process. |

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| 276. | **What happens during the modify steps in 360 Reviews?** | Raters are nominated and approved. |
| 277. | **What step is specific to 360 Forms?** | Evaluation step. All raters receive the form. |
| 278. | **Which step does rating take place during the 360 Review process?** | The Evaluation step. |
| 279. | **When is the 360 Form marked as complete?** | When all raters have submitted their evaluations? |
| 280. | **Modify stage of 360 Reviews** | You can modify the step name, description, type, reviewer roles, and dates. During the actual 360 Review process, the raters are nominated in this stage. |
| 281. | **Evaluation stage of 360 Reviews** | You can modify the step name, description, and dates. During the actual 360 Review process, the raters evaluate the subject of the form. |
| 282. | **Signature stage of 360 Reviews** | You can modify the step name, description, type, and dates. Although the Signature Stage is available in a 360 Review, we do not recommend using it. |
| 283. | **Completion stage of 360 Reviews** | You can modify the step name and Select Carbon Copy Roles. During the actual 360 Review process. The Detailed 360 Report is available. |
| 284. | **What differs about the evaluation process for internal raters versus external raters?** | For internal raters, the evaluation process is like any other performance review while for external raters, they receive an email that invites them to give feedback. |

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| 285. | **What happens if an external rater declines the invitation to evaluate?** | This information is fed back to the original form. |
| 286. | **If the external rater accepts the inivtation to evaluate, what process must they complete before accessing the form?** | A verification process. |
| 287. | **Steps in the 360 Review process are as follows:** | 1. Launch the forms.<br>2. Select raters.<br>3. Evaluate the review. |
| 288. | **Detailed 360 Review Report** | After reviews have been submitted, this report is available from the employee's 360 Review form. There are four different views available in the Detailed 360 Report:<br><br>1. Graphical Summary (default opening view)<br>2. Gap Analysis<br>3. Hidden Strength and Blind Spot<br>4. Rank |
| 289. | **Who typically has access to the Detail 360 Report?** | The Employee's manager. |
| 290. | **How does a manager access the Detail 360 Report** | From the En Route folder. |

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| | once they've provided their own evaluation? | |
| 291. | How does a manager access the Detail 360 Report once participants have submitted their evaluations? | From the manager's Completed folder. |
| 292. | If the role has permission to view the reports, where is the Detailed 360 Report available? | The link is available in the completed form in the Evaluation Summary section. |
| 293. | The Graphical Summary View | This displays by default and it provides an overview rating broken down by the individual rater roles. It also provides a graphical rating and a comment for each individual competency or goal that was rated. |
| 294. | What form permissions can you configure for the Graphical Summary View? | You can configure the template so that the names of the raters do not show up to specific roles during certain route map steps, including the completed step. |
| 295. | Overview section of the Graphical Summary View | The average overall rating by rater type as well as ratings categorized, and a radar chart for each Competency section. There are also minimum and maximum ratings. |
| 296. | Analysis by Section section of the | Displays all of the raters' ratings and comments by competency, in a card view. |

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| | Graphical Summary View | |
| 297. | What can you configure for ratings and comments on the Graphical Summary View if a minimum number of ratings were not met? | This report can be configured to roll up if a minimum nubmer of ratings are not met. |
| 298. | If rollup categories are defined for the Graphical Summary View, what happens? | The responses are grouped together. |
| 299. | The Gap Analysis View | Identifies differences between the employee's rating of their own performance and the participants' performance ratings for the employee. |
| 300. | If raters rate the employee's performance higher than the employee does, what is the employee notified of? | Strengths that they may be overlooking. |
| 301. | If raters rate the employee's performance lower than the employee does, what does this mean? | Could be an area for the employee to develop. |

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| 302. | **What does the Hidden Strength and Blind Spot View allow viewers to see?** | Where there is a significant difference between how employees rate themselves compared to how others rate them. |
| 303. | **Hidden Strength View** | If an employee rates themselves low on a certain competency, but everyone else rates them high, this competency is considered a hidden strength. |
| 304. | **Blind Spot View** | If the employee rates themselves high on a specific competency, but everybody else rates them low, this competency is a blind spot. |
| 305. | **The Rank View** | Helps with the identification of the employee's strengths and development opportunities.<br><br>Displays the employee's competency rankings from highest to lowest and lowest to highest. |
| 306. | **Form template** | A shell that contains the structure (layout) of the 360 Review. |
| 307. | **What does the form template control for 360 Reviews?** | Controls which rating scale is used, which route map is used, and other settings and options. |
| 308. | **What are ways to create a form template for 360 Reviews?** | 1. Add a template from the SuccessStore.<br>2. Import a template in Form Template Settings.<br>3. Copy an existing form template in Manage Templates. |
| 309. | **What is best practice for creating a form template when a customer wants the proccess and** | Copy the form template for the next cycle. |

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| | form to stay the same cycle after cycle? | |
| 310. | Best practice for section weights in 360 Reviews form? | Hard code and lock down section weights or omit section weights entirely. |
| 311. | What is the Rater Section also called? | The participant section. |
| 312. | The rater section | Includes all the participants that will be evaluating the subject during the 360 Evaluation stage. |
| 313. | What stage does the rater section only appear in? | The Modify stage. |
| 314. | The raters can be configured to populate in this s ection based on the relationship of their role to the employee being evaluated which is determined by what? | The User Data File (UDF). |
| 315. | Which column is the rater's relationship of their role to the employee being | The Category column. |

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| | **evaluated captured in?** | |
| 316. | **Difference between a warning message and error message?** | A warning message does not prevent the user from progressing to the next step. However, an error message does not permit the user to progress until the minimum and maximum parameters are met. |
| 317. | **If the customer wants an error message to appear instead, so that the user is not able to move to the next step until the error is corrected:** | Replace the word "warning" in the <min- warning-msg> and </min-warning-msg> tags with the word "error". |
| 318. | **Hidden threshold values** | Specifies the minimum number of raters that are required to evaluate the subject of the 360 Reviews before the average for that category can be displayed in the 360 Detailed Reports. |
| 319. | **The Rating rollup type is only selected when what is set to what?** | When the "Unmet threshold action" is set to "rollup". |
| 320. | **Rating rollup types** | Circular and Uturn |
| 321. | **Circular rating rollup type** | The data rolls to the next category group that is listed in the meta-360-rollup-category-name. |
| 322. | **Uturn rating rollup type** | The data rolls to the next category group that is listed in the meta-360-rollup-category-name and if that threshold is not met it rolls back up the list. |

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| 323. | **What is the recommended rollup type?** | Circular. |
| 324. | **What happens if Category Thresholds are set, but no rollup is specified in the XML?** | The daata for eaach of the categories is dropped and cannot be viewed in the Detailed 360 Report. |
| 325. | **Which rating rollup type is not common nor recommended?** | Uturn rating rollup type. |
| 326. | **Which direction do categories read for the order of rollup?** | From the bottom up. |
| 327. | **Reviewer Information section** | Unique to a 360 Reviews form. In this section of code, the information shown about each rater is determined. |
| 328. | **Is the content in each Attribute and Goals section configurable? What does this mean?** | Yes, this means that the manager or process owner of the form can manually add or remove competencies, skills and goals. Additionally, you can configure the review to allow the participant to remove items from the form. |
| 329. | **What controls the ability to launch forms?** | Permissions. |
| 330. | | Create New Form from the Performance section of the system.<br><br>Mass create forms through Launch 360 Reviews, available from Action Search. |

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| | **What are the different ways to launch a form?** | |
| 331. | **What happens to ratings or feedback when you decline a 360 Review form to unblock the 360 Reviews process for a specific user?** | No ratings or feedback already saved by the rater on leave are included in the Detailed 360 Report. |
| 332. | **What happens to ratings or feedback when you complete a 360 Review form to unblock the 360 Reviews process for a specific user?** | Any ratings or feedback already saved by the employee on leave are included in the Detailed 360 Report. |
| 333. | **If the 360 Review process is blocked because someone has not completed their evaluation, what are some actions that can. be taken to complete the process?** | 1. Send a reminder email.<br>2. Remove the rater.<br>3. Manually complete the document in Complete/Decline 360 Form. |
| 334. | **What must you know in order to re-** | The document number. |

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| | store a completed form? | |
| 335. | The function of changing a 360 Reviews form process owner is usually handled automatically by the following: | "Document Transfer" settings in the 360 Reviews form template<br><br>Rules set in the Employee Change Engine<br><br>Employee Data File Imports |
| 336. | What stage can manual process owner modification be performed in? | Any stage, including the Completed stage. |
| 337. | What stage can manual participant modification be performed in? | Any stage, including the Completed stage. |
| 338. | What does the 360 Reviews process typically start with? | The subject (Employee) nominating participants to evaluate 360 reviews, rate competencies and/or goals, and provide feedback. |
| 339. | How many steps does the Modify Stage consist of? | One or more. |
| 340. | Process Owner | User who sends the form to the evaluation step. |
| 341. | | |

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| | Actions that can be taken during the Modify Stage: | 1. Add more approvers.<br>2. Nominate and approve raters.<br>3. Define competencies (and goals). |
| 342. | What must you do before adding additional raters to the Raters List? | Place them into categories (ex: External, Direct Report, Peer). |
| 343. | Each internal participant will be able to access the 360 Reviews in any of these ways: | 1. A Complete 360 Evaluation engagement card will be visible in the Home Page, under the For You Today section, and the participant can select Go to Form to start the evaluation.<br><br>2. From the Home menu, navigate to Performance to locate the 360 Reviews form in the Inbox.<br><br>3. From the Action Search, type View 360 Reviews Forms to navigate to the Inbox. |
| 344. | When will the Recall button be available for the Process Owner? | If they're a participant. |
| 345. | What two AI-Assisted Writing capabilities are available in 360 Reviews? | Generate Comments and Improve My Feedback. |
| 346. | Generate Comments | Available when no text is selected, this item suggests six topics dynamically based on the rating assigned to the current competency or skill. Users can choose one topic and let the tool generate detailed comments relevant to the competency or skill and its rating, without needing users to provide initial text |

input.

Users can further edit the comments manually or with the help of the tool.

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| 347. | **Improve My Feedback** | Available when there is text selected, this item assists users in providing clear, concise, and professional comments that are pertinent to a specific skill or competency and its rating.<br><br>Users can view the improved feedback or evaluate multiple attempts in a separate dialog before applying a result. |
| 348. | **What did the Generate Comments tool used to not be able to do?** | Generate detailed comments without needing users to provide initial text input. |
| 349. | **What is the unique option included in My Feedback with AI-Assisted Writing?** | User can improve their own feedback using AI Capabilities. |
| 350. | **The generative AI in the Detailed 360 Report can be used in two scenarios:** | 1. Overall understanding of a Detailed 360 Report: The insights are organized into sections to help users grasp the most important aspects of the report.<br><br>2. Consolidated analysis of a specific skill or competency: The insights are organized into sections to provide an in-depth analysis of the employee's performance in a specific area, along with tailored growth recommendations. |
| 351. | **What sections are included in the Overall Insights for 360 Report section?** | Employee Summary, Key Points, Suggestions for Improvements. |
| 352. | | Topics, Suggestions for improvement, and Summary. |

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| | What sections are included in the Comment Insights for 360 Report section? | |
| 353. | 360 Executive Review page | Offers a dashboard view of all 360° forms for individuals within a shared group. Allows managers and HR representatives to identify the current report progress, and filter by form template to generate a list view report. |
| 354. | What does the 360 Executive Review feature helpful for? | In identifying who needs to take action to keep the review cycle moving forward. |
| 355. | What functionality in 360 Executive Review is especially beneficial to multinational businesses that provide form visibility to central HR admins across subsidiaries? | The Share Groups function which enables local and regional HR administrators to create groups and share the forms of those within those groups to other more central HR administrators. |
| 356. | Where do you go to to test the goal plan after translating? | Go to Settings > Change Language tab |
| 357. | What do you need to do to get translated libraries to show? | Add the goal library ID to the XML in addition to the name. |
| 358. | | |

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| | Ways to add translated Competency Libraries to the system: | 1. Add directly from the SuccessStore.<br>2. Through Provisioning.<br>3. If the customer has a custom competency library, they can provide the translations in a .csv file or edit them directly in Manage Competencies. |
| 359. | Form Label Translations or localization | This method allows the customer to configure one template that displays labels in the local language of each user. |
| 360. | There are two ways that you can configure localization: | In Manage Templates:<br>- Message Keys are automatically created in the process for each translated field.<br>- Localized labels configured for each field can be downloaded in a .csv file.<br><br>In the XML and in the Form Label Translations:<br>-The Message Keys must be added in the XML for all fields.<br>-A .csv file must be created with the default and translated labels for each Message Key and uploaded in the Instance. |
| 361. | Which ratings and elements need to be translated in the Performance Form? | Default Rating field, alternate rating label, and custom elements. |
| 362. | What are automatically generated when we do translation work? | Element Keys (MSG Keys). |
| 363. | What is it recommended to do once you get the auto generated element key? | Change. this long string of numbers and follow a naming convention that contains an abbreviation of the template name, the section name and the field. |

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| 364. | **If you aren't using all the locales and have empty cells, what should you do?** | Remove the columns for the locales not being used. |