

Performance Setting Training Guide
Example

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Performance Management Training

HCM Sign on Instructions

HCM Sign on Instructions

1



Internet Explorer

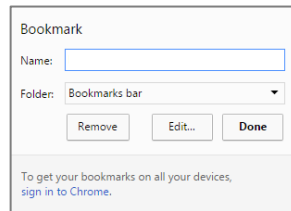
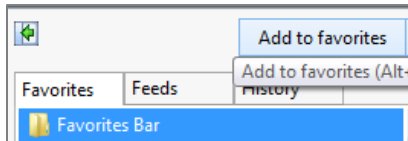


chrome

2

<https://ebdy.fs.us1.oraclecloud.com/homePage/faces/FuseWelcome>

3



***** Note that this link is only compatible with web links accessed from a laptop or computer. It does not support tablets or Smartphones***

1 Access internet via Firefox, Internet Explorer or Chrome.

2 Copy/paste link to the browser.

3 Save this link for future use. Add to the favorites bar.

*****Remember to disable the pop-up blockers, clear the cache/cookies and view everything in "full screen" mode.*****

HCM Sign on Instructions



ORACLE Fusion Applications

Sign In

Enter your single sign-on user ID and password.

User ID

Password

Sign In

[Forgot Password](#)

English

4 Enter user ID (company email address)

5 Password




First time Sign on – Password Reset Instructions will be sent to your email address



6

Oracle Identity Manager

Password Management

 **Password Management**

Provide a new password.

Your password will expire on March 8, 2017.

* Old Password


* New Password

* Re-Type New Password


Password Policy

- Password must not match or contain first name.
- Password must not match or contain last name.
- Password must contain at least 2 alphabetic character(s).
- Password must be at least 6 character(s) long.
- Password must contain at least 1 lowercase letter(s).
- Password must contain at least 1 numeric character(s).
- Password must contain at least 1 uppercase letter(s).
- Password must start with an alphabetic character.
- Password must not match or contain user ID.


Register challenge questions for your account

* Question 1 

* Answer 1

* Question 2 

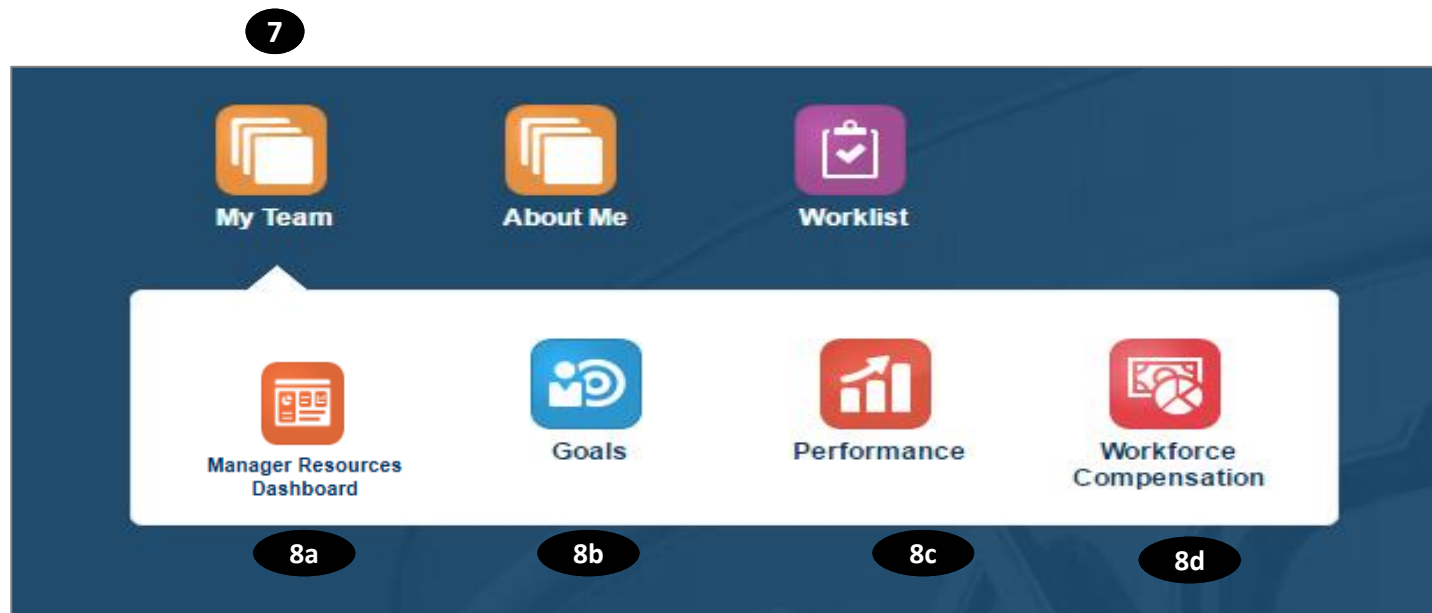
* Answer 2

* Question 3 

* Answer 3

6 Follow password reset instructions.

HCM Sign on Instructions



7 This is the landing page for Managers who perform performance appraisals.

8a Manager Resources Dashboard – Provides various reports and snapshots of your population related to goals and performances.

8b Goals – Click here to appraise your employee goals.

8c Performance – Click here to appraise your employee performances.

8d Workforce Compensation - For comp planning time, not necessary for performance appraisals.

Performance Management Training
Overview of Performance Management

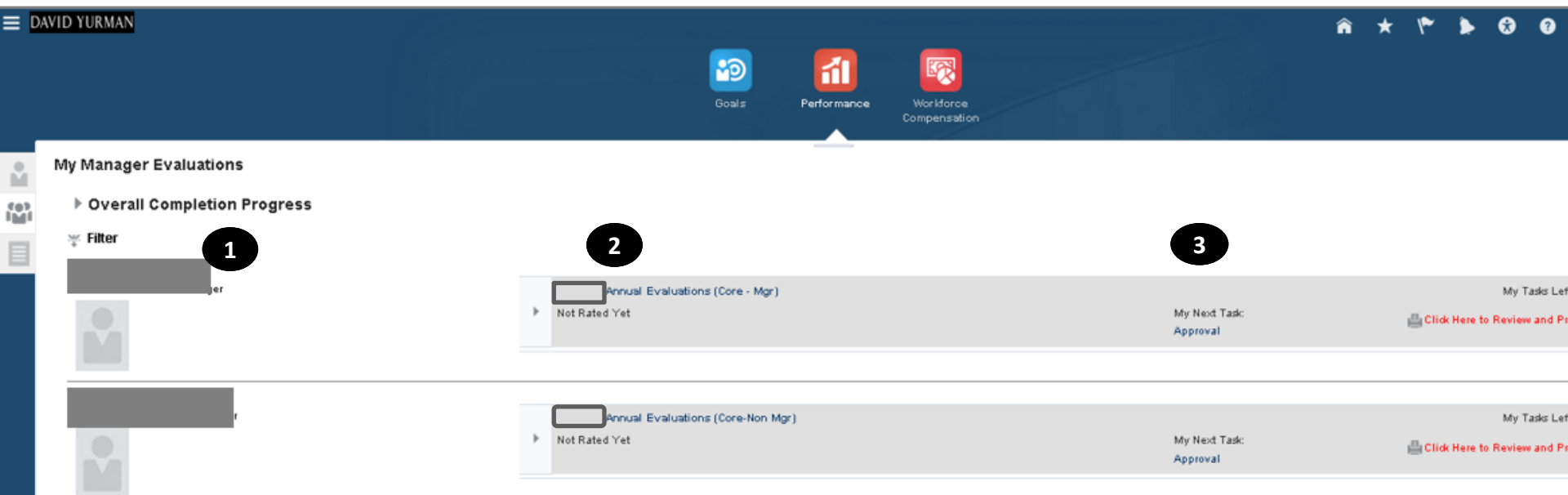
Performance Management is an application that is used to manage the key action items that take place during the annual employee review process. This includes the following:

Manager writing of Employee Appraisal

- ✓ Goal Assessment Rating
 - ✓ Performance Appraisal Rating:
 - ✓ Development Plans:
-
- ✓ Manager Submitting Employee Appraisal For Approval
 - ✓ Manager Approval Workflow
 - ✓ Manager Sharing Employee Appraisal With Their Direct Report
 - ✓ Employee and Manager Final Feedback and Signature
 - ✓ Performance Management Reports

This training guide provides a step-by-step instruction on each of the functions described above.

Overview of Performance Management




Once you are in the performance appraisal module, there is a full list of all your direct reports.

- 1 The employee names on the left.
- 2 The performance templates are in the middle.
- 3 The current task status and the print icons are on the right.

Performance Management Training
Manager Evaluation of Employee

Manager Evaluation of Employee

The screenshot shows a web interface for "Annual Evaluations (Core-Non Mgr)". At the top, a header bar contains a dropdown menu (callout 1), the text "Not Rated Yet", "My Next Task: Manager Appraisal of Employee", and "My Tasks Left: 6" with a link "Click Here to Review and Print". Below the header is a list of tasks: "Manager Appraisal of Employee" (with a "Begin" button, callout 2), "Manage Participant Feedback" (with an "Optional" label and a "Begin" button), "Approval", "Share Performance Document", "Confirm Review Meeting Held", and "Provide Final Feedback". A modal dialog titled "Create Performance Document" (callout 3) is open, containing fields for "Review Period" (with a dropdown), "Start Date" (01/01/2016), "End Date" (12/31/2016), and "Manager Name" (with a text input). A "Continue" button (callout 3) is at the bottom of the modal. A "Confirmation" dialog (callout 4) is also open, showing a green checkmark, the text "Confirmation Goal Assessment Performance", and an "OK" button.

- 1 Click the triangle “

12

Manager Evaluation of Employee - Assessing Employee Goals

Task: Manager Appraisal of Employee

Attachment: None

Click Here to Review and Print | Save | Submit | Cancel

Show More

Goals Assessment

0 / 5 Ratings Entered
0 / 5 Comments Entered

Select the CALCULATOR icon to Display the Rating in this Section

Manager Overall Comments

Sort By: Name | Show All Comments | Add

Performance Appraisals

0 / 8 Ratings Entered
0 / 8 Comments Entered

Development Plan

Additional Manager Comments

Goal#-1: Enter Manager Rating → [] ← Enter Manager Comment

Goal#-2: Enter Manager Rating → [] ← Enter Manager Comment

Goal#-3: Enter Manager Rating → [] ← Enter Manager Comment

Goal#-4: Enter Manager Rating → [] ← Enter Manager Comment

Goal#-5: Enter Manager Rating → [] ← Enter Manager Comment

5 When the screen launches, you will see 4 sections.

5a **Goals Assessment** (employees' part of the AIP bonus plan must be assessed to calculate bonus rating scores).

- **Performance Appraisals** - Rate employee's performances which are tied to their merit calculation.

5b • **Development Plan** – Provide feedback on areas of strength and areas of improvement.


5c • **Additional Manager Comments** – Provide final overall feedback.


5d

Select the applicable section to begin the review process (note: the landing page defaults to the Goals Assessment section).

Manager Evaluation of Employee - Launching Review Form


7

 Task
Manager Appraisal of Employee

Attachment
None 


[Click Here to Review and Print](#) Save Submit Cancel Show More


Goals Assessment

 0 / 5 Ratings Entered
0 / 5 Comments Entered











8a

Select the CALCULATOR icon to Display the Rating in this Section


Manager Overall Comments 

Sort By Name  Show All Comments Add

8b


Goal#-1	<a>Enter Manager Rating →			<a>← Enter Manager Comment
Goal#-2	<a>Enter Manager Rating →			<a>← Enter Manager Comment
Goal#-3	<a>Enter Manager Rating →			<a>← Enter Manager Comment
Goal#-4	<a>Enter Manager Rating →			<a>← Enter Manager Comment
Goal#-5	<a>Enter Manager Rating →			<a>← Enter Manager Comment

Performance Appraisals

 0 / 8 Ratings Entered
0 / 8 Comments Entered

Development Plan

Additional Manager Comments



6 In this example, we are beginning with the goal assessment section.

7 There are two options for entering ratings and comments. All comments in this goal section are mandatory.

7a Click the “Show All Comments” button and enter rating appropriately.

7b Click the “Manager Rating” and “Manager Comment” section.

Manager Evaluation of Employee – Appraising Employee Goals

The screenshot displays the 'Manager Appraisal of Employee' interface. At the top, there's a header with a user profile icon, the title 'Manager Appraisal of Employee', an 'Attachment' section showing 'None', and a 'Click Here to Review and Print' link. On the right, there are 'Save', 'Submit', and 'Cancel' buttons. A 'Show More' link is also present.

The main content area is divided into a left sidebar and a main panel. The sidebar contains three sections: 'Goals Assessment' (5 / 5 Ratings Entered, 0 / 5 Comments Entered), 'Performance Appraisals' (13 / 13 Ratings Entered, 0 / 13 Comments Entered), and 'Development Plan'. The 'Goals Assessment' section is currently active.

The main panel has a 'Goals Assessment' header. Below it, there's a red text instruction: 'Select the CALCULATOR icon to Display the Rating in this Section'. A large black oval with the number '10' is overlaid on this instruction. Below the instruction is a 'Manager Overall Comments' text area. Further down, there's a 'Manager Comments' section with a rich text editor (font, bold, italic, underline, list, link, unlink, undo, redo, insert link, insert image) and a 'Sort By' dropdown set to 'Name'. Below the comments section, there's a 'Goal#1' section with a 'Manager Comments' text area and a 'Enter Manager Rating' button. A dropdown menu is open next to the 'Enter Manager Rating' button, showing a list of completion percentages: '2 - 75% Completion', '1 - 100% Completion', '2 - 75% Completion', '3 - 50% Completion', and '4 - Less than 50% Completion'. The '2 - 75% Completion' option is selected.

8a This screen will appear after clicking the “Show All Comments” button.

9 To begin the goal assessment section:


9a Rate each goal.

9b Enter the individual goal comments.

9c Enter the overall comments (this is a mandatory entry to provide overall summary for the ratings of all of the goals in this section).

10 Click on the Calculator  icon to display the rating after all goal ratings have been entered.

Manager Evaluation of Employee - Appraising Employee Performances



Task
Manager Appraisal of Employee

Attachment
None +

Click Here to Review and Print Save Submit Cancel

Show More

Goals Assessment
0 / 6 Ratings Entered
0 / 6 Comments Entered

Performance Appraisals
0 / 13 Ratings Entered
0 / 13 Comments Entered

Development Plan

Additional Manager Comments

Performance Appraisals

Select the CALCULATOR icon to Display the Rating in this Section

12

13

Show All Comments Add

Behaviors - Collaborates Effectively (Core Manager) 11 Manager

Behaviors - Dares to Take Risk (Core Manager) Manager

Behaviors - Displays Innovation and Resourcefulness (Core Manager) Manager

Behaviors - Embraces Company and Values (Core Manager) Manager

Behaviors - Takes Initiative (Core Manager) Manager

Functional Effectiveness - Accountability and Responsibility (Core Manager) Manager

Functional Effectiveness - Fiscal and Resource Management (Core Manager) Manager

Functional Effectiveness - Functional Expertise (Core Manager) Manager

Click on the “Performance Appraisal” section, to enter ratings.

11 Enter ratings for each competency. The comments under each section are optional.

12 Click “Calculator” icon to view calculated score.

13 Enter the manager’s overall comments. This is mandatory.

Manager Evaluation of Employee - Writing Development Plan

[illegible]

Manager Evaluation of Employee – Additional Manager Comments

Goals Assessment
5 / 5 Ratings Entered
0 / 5 Comments Entered

Performance Appraisals
8 / 8 Ratings Entered
0 / 8 Comments Entered

Development Plan

Additional Manager Comments

Additional Manager Comments

Manager Comments

Font

2

B I U

Click Here to Review and Print

Save Submit Cancel

16

17

15

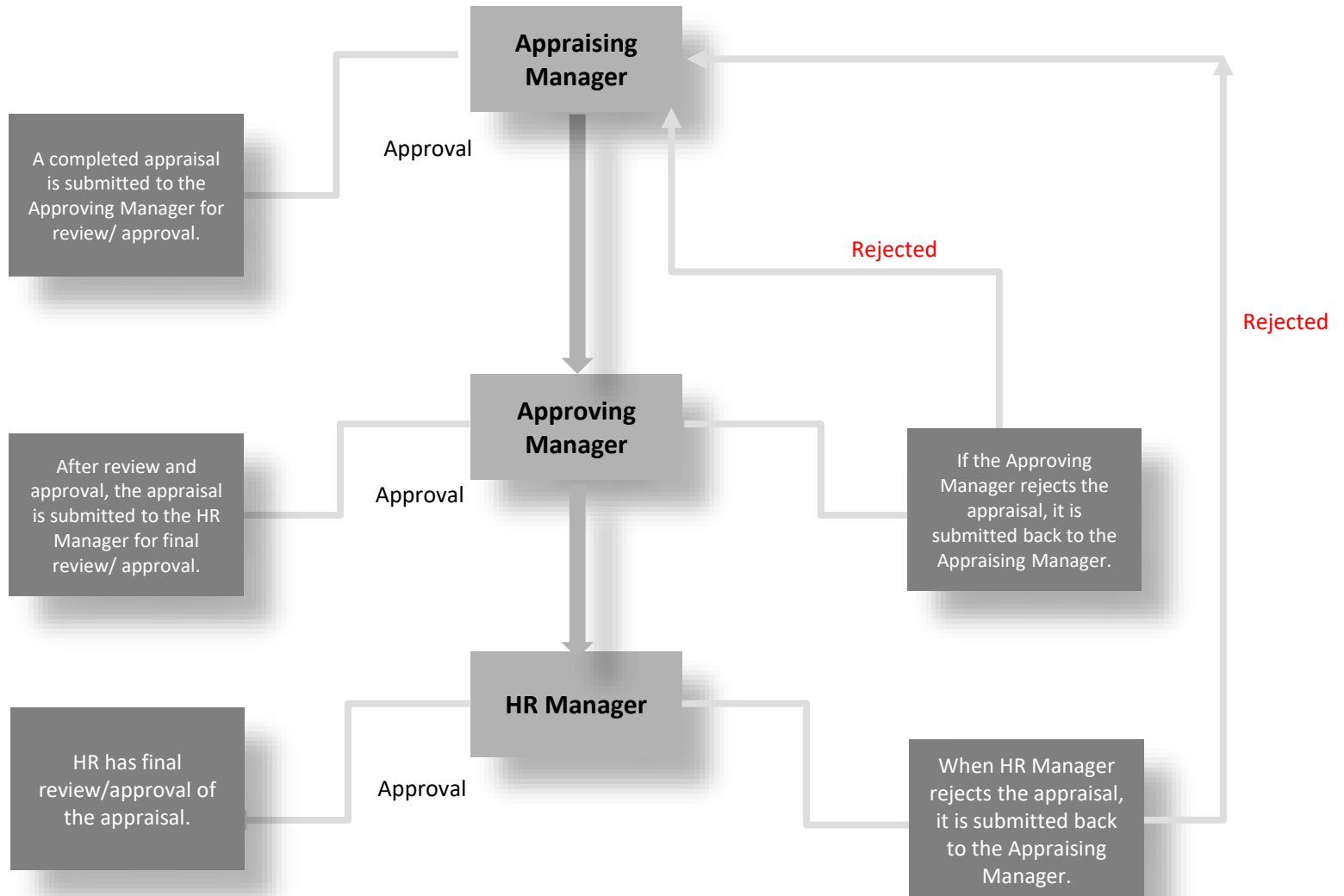
15 Click “Additional Manager Comments” is optional. If selected you will access the additional manager’s comment screen for entry of comments.

16 Select the print icon  to review the appraisal prior to Submitting for approval

17 Once all sections have been completed, click “submit” for manager’s approval.

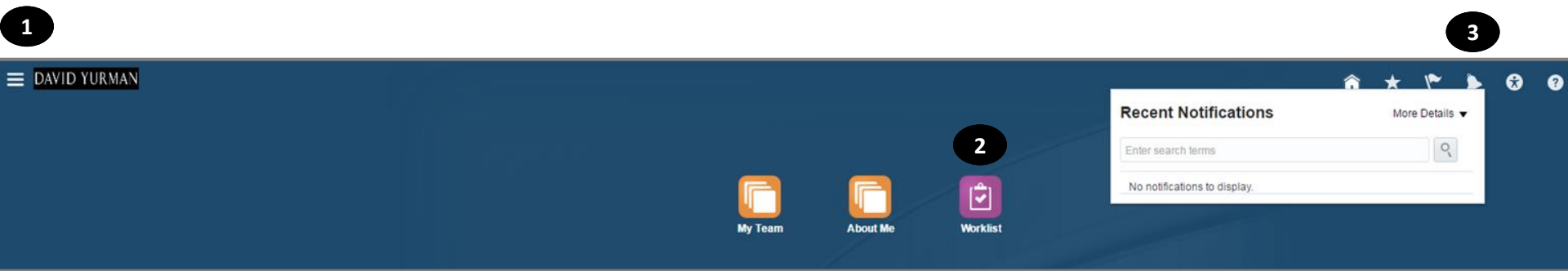
Performance Management Training
Performance Approval Workflow


Performance Approval Workflow



Performance Management Training
Approving Performance Document

Approving Performance Document




- 1 As the Approving Manager, click the **Navigator** and select "**Worklist**" under "**Tools**."
- 2 Access "**Worklist**" on your homepage.
- 3 Click the Bell  icon to view notifications.

Approving Performance Document

Worklist: Notifications and Approvals 4

Customer Relationship Management Financials **Human Capital Management** Incentive Compensation Procurement Projects Setup and Maintenance Supply Chain Management

My Tasks ▾ Actions ▾ View ▾ Assigned ▾ < >

<input type="checkbox"/> Title	State	From User Display Name	Assigned
 Approval Required for the Performance Document <input type="text"/> Annual Evaluations (Retail Inventory Control Manager) <input type="text"/> Test Employee	Assigned		

5

6

Firefox prevented this site from opening a pop-up window. Options

Worklist: Notifications and Approvals

- Allow pop-ups for ebdy-test.fs.us1.oraclecloud.com
- Edit Pop-up Blocker Options...
- Don't show this message when pop-ups are blocked
- Show 'https://ebdy-test.fs.us1.oraclecloud.com/homePage/faces/adf.task-flow?ad...

- 4 Click on the “**Human Capital Management**” (it is the only relevant tab, other tabs are not relevant).
- 5 The notification will read: “**Approval Required for the Performance Document (XYZ) for (Emp, Name).**”
- 6 Make sure to allow “**Pop- Ups**” in the browser setting.

Approving Performance Document

Approval Required for the Performance Document 2016 DY Annual Evaluations (Retail Inventory Control Manager) for Joshua Broome

Actions ▾

7

Details

Assignee

From

Assigned Date

Task Number

Worker Name

Performance Document

Recommended Actions

Overall Rating

Manager Overall Rating 8

Manager Overall Comments

Test

Related Links

[View Performance Document](#) 9

Comments

No data to display

7

Once taken to this screen. Click “Approve.”


Once the document has been approved, it will be moved to the next stage

8


Note Ignore the “**Overall Rating**” field on this screen, as it is not currently being used and will not be populated with a value. The Company Rating calculations will appear on the printout of the employee appraisal Forms

9


Under related links, click it to take you back to the performance module in HCM.



My Manager Evaluations




► Overall Completion Progress



Filter

EMPLOYEE TEST 1




Annual Evaluations (Core - Mgr)


► Not Rated Yet

My Next Task:
Approval
Due Date: 1/21/17

My Tasks Left: 4

 [Click Here to Review and Print](#)

EMPLOYEE TEST 2




Annual Evaluations (Core-Non Mgr)

► Not Rated Yet

My Next Task:
Manager Appraisal of Employee
Due Date: 1/14/17

My Tasks Left: 6

 [Click Here to Review and Print](#)

*****You will be launched into this screen*****

Performance Management Training
Sharing Performance Document

Sharing Performance Document

DY Annual Evaluations (Retail Inventory Control Manager) My Tasks Left: 3
Not Rated Yet My Next Task: [Share Performance Document](#) [Click Here to Review and Print](#)

✓ Manager Appraisal of Employee	View
✓ Manage Participant Feedback <i>Optional</i>	View
✓ Approval	Date Completed: 11/22/16
Share Performance Document	1 Begin
Confirm Review Meeting Held	Begin
Provide Final Feedback	Begin

2

[Share and Release](#) [Cancel](#)

[Show More](#)

Share and Release Performance Document

Text

[Ok](#) [Cancel](#)

****Note** The 'Share Performance document' button will NOT be available to select until after Compensation planning cycle is completed. HR will activate this button and notify the Managers when the Employee Review process is reaCompany to schedule.

It is recommended to wait until the review is taking place to Share the document. Once the 'Begin button' is selected, the employee is immediately notified and are able to sign in and print out their Review.

1 Click the “Begin” button next to “Share Performance Document.”

2 Click “Share and Release.” Enter comments and then click “Ok.”

Performance Management Training

Printing Performance Document and Setting Up Meeting With Employee

Printing Performance Document and Setting Up Meeting With Employee

Annual Evaluations (Retail Inventory Control Manager)

Not Rated Yet

My Next Task: Confirm Review Meeting Held

My Tasks Left: 1

✓ Manager Appraisal of Employee View

✓ Manage Participant Feedback Optional View

✓ Approval Date Completed: 11/22/16

✓ Share Performance Document View

Confirm Review Meeting Held 2 Begin

Provide Final Feedback Begin

Warning

The application will record that the meeting was conducted. Do you want to continue? (HRA-960180)

Meeting Held Date 3

Yes No

My Next Task: Manager Appraisal of Employee

My Tasks Left: 6

Click Here to Review and Print

1 Click here to Review and Print.

2 Click the “Begin” button next to “Confirm Review Meeting Held.”

3 Enter “Date” and click “Yes.”

Once the “Share and Release” button is clicked, a notification will be sent to your employee

Performance Management Training
Dashboard Reporting

Overview

- Manager's Resource Dashboard is a reporting tool, which provides various reports and snapshots of Manager's Hierarchy pertaining to goals and performance appraisal process.
- The Information can be viewed on line and exported to excel

Reports Descriptions are provided below:

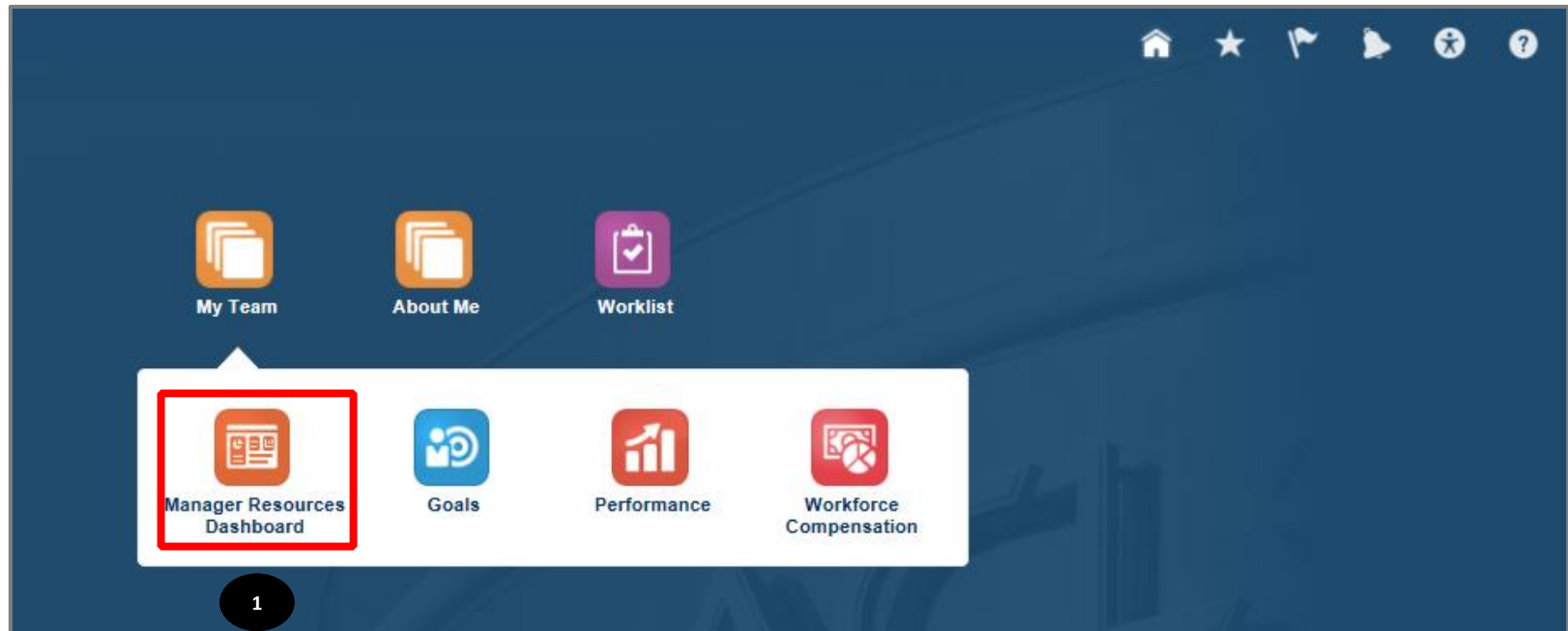
GOAL CREATION REPORTS

Goal Summary/Detail Dashboard	The Goal Summary Dashboard provides a graphical representation of AIP Eligible employees that have and have not entered their Goals
Goal Plan Validation	The Goal Plan Validation provides a detail breakdown of the Goal Dashboard with a list of the Direct and Indirect AIP Eligible employees who have and have not entered their goals
Goal Details By Manager	The 'Goal Details by Manager's report provides a breakdown of the AIP Eligible employee's Goal and includes Their Weight Percent, Eligibility profile and Goal Progress.

PERFORMANCE APRAISAL AND GOAL ASSESSMENT REPORTS

Performance Summary	The Performance Summary Dashboard provides a graphical representation of current year Performance Appraisal and Goal assessment rating's Information includes the Appraisal workflow status and both the Manager and Employee feedback comments at signoff
Historical Ratings	Historical Ratings Report provides a three year lookback of the employee appraisal ratings (2013,2014,2015)

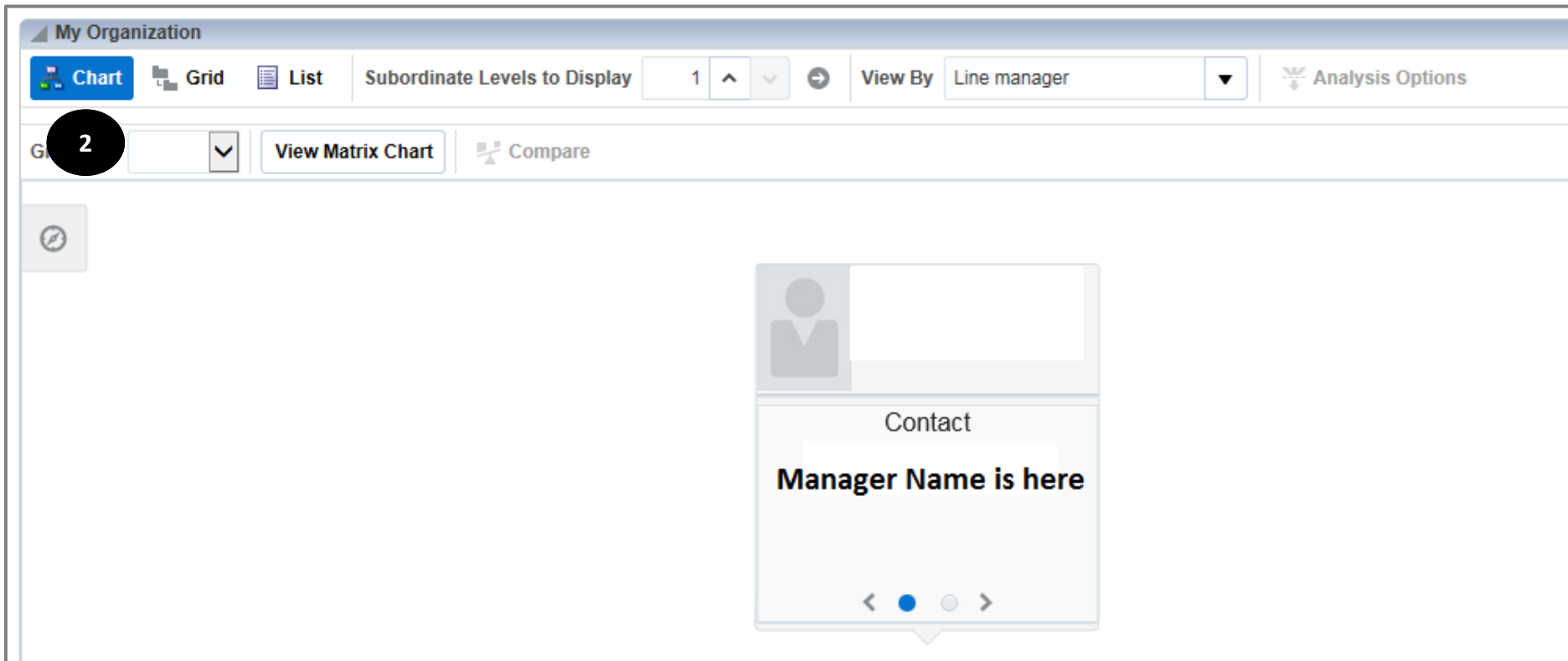
Accessing Manager Resource Dashboard



1

The Manager's Resource Dashboard' can be accessed directly from the Manager's Homepage by Selecting the icon 'Manager's Resource Dashboard'

Landing Page for Manager Resource Dashboard

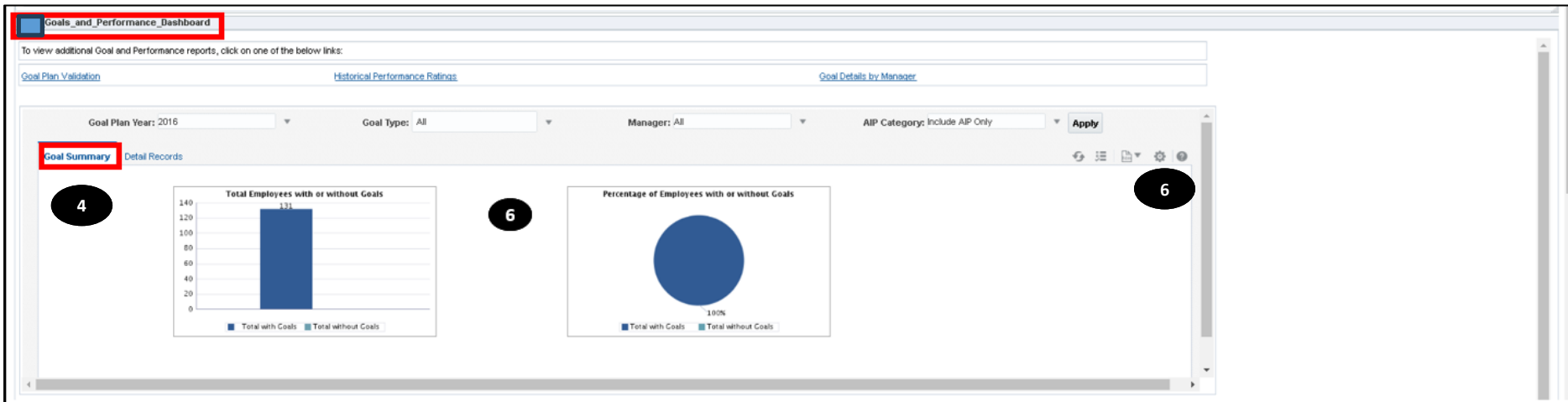


2

View your employee information under “My Organization.” Stay on the “Chart” task and access the dashboard by scrolling down the page.

Goal Summary/ Details Dashboard

3



My Organization

Goals_and_Performance_Dashboard

To view additional Goal and Performance reports, click on one of the below links:

[Goal Plan Validation](#) [Historical Performance Ratings](#) [Goal Details by Manager](#)

Goal Plan Year: 2016 Goal Type: All Manager: All AIP Category: Include AIP Only Apply

5 **6**

Detail Records

Manager	Manager Number	Total Employees with Goals	Total Employees without Goals	Total Count
---------	----------------	----------------------------	-------------------------------	-------------

- 3 Access the Goal Summary and Detail Records will be under the “Company_Goals_Performance_Dashboard” section. If you don’t see it, scroll down the page.
- 4 Under “Goal Summary,” you will see graphs that will help will inform you whether or not your employees have or do not have goals.
- 5 Under “Detail Records,” it portrays data regarding managers, total count, total employees with and without goals.
- 6 Click “Export,” to export the report into excel , pdf, power point, etc.

Goal Validation

My Organization

Goals_and_Performance_Dashboard

To view additional Goal and Performance reports, click on one of the below links:

[Goal Plan Validation](#) [Historical Performance Ratings](#) [Goal Details by Manager](#)

Goal Plan Year: Goal Type: All Manager: All AIP Category: Include AIP Only **Apply**

Goal Summary **Detail Records**

Manager	Manager Number	Total Employees with Goals	Total Employees without Goals	Total Count
---------	----------------	----------------------------	-------------------------------	-------------

Goal Plan Year: Legal Employer: All Business Unit: All Department: All Location: All Manager: All Person Number:

Results Export Report Definition

GOAL MANAGEMENT | GOAL PLAN VALIDATION

Goal Plan Year:	2017	Legal Employer:	All
Department:	All	Location:	All
Person Number:			

Employee	Person Number	Email Address	Legal Employer	Business Unit	Department
----------	---------------	---------------	----------------	---------------	------------

HTML PDF Excel (*.xlsx) CSV **Export**

7 a Click here to access the “Goal Plan Validation” report.

7 b Click “apply” after you reviewed all of the filters.

7 c Click  to export the report in excel, pdf, html, or csv.

Goal Details By Manager

8 a [Goal Details by Manager](#)

Goal Plan Year: 2016 Goal Type: All Manager: All AIP Category: Include AIP Only **Apply**

8 b **Goal Approval Status:**

- ☒ All
- ☐ Approved
- ☐ Mass request
- ☐ Pending Transfer
- ☐ Pending approvals
- ☐ Rejected

8 c **Apply**

Manager	Employee	Employee ID	Job	Bonus Eligibility Type	Secondary
Test	Test	Test	Test	Corp AIP	Test
Test	Test	Test	Test	Corp AIP	Test

Department	Hire Date	Performance	HR
Test	10/27/2008	Performance	HR
Test	10/27/2008	Performance	HR

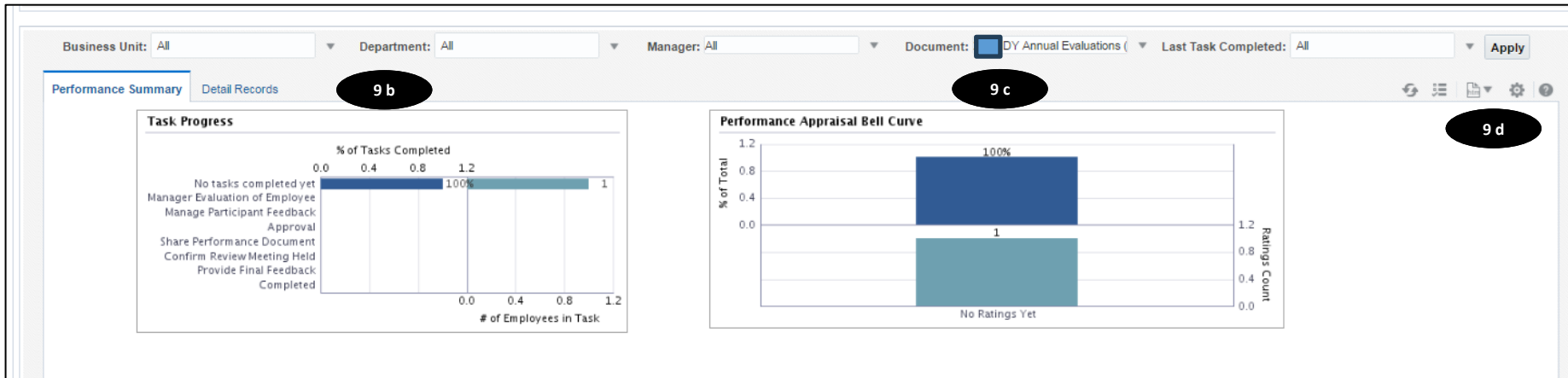
8 a Click here to access the “Goals Details By Manager” report.

8 b Filter by statuses such as “Approved, Mass Request, Pending Transfer, Pending Approvals, or Rejected.”

8 c Click “apply” after you reviewed all of the filters. Export the data into “HTML, Excel, PDF, or CSV.”

Performance Summary

9 a



The screenshot shows the 'Performance Summary' dashboard with the 'Detail Records' tab selected. The table below lists employee records:

Employee	Employee ID	Current Manager	Bonus Eligibility Type	Evaluation Manager	Manager Comments	Worker Comments	Business Unit	Department

9 d

9 a Scroll down the page to see the “Performance Summary” and “Details Records.”

9 b View information regarding your employee’s performance tasks.

9 c View information regarding % of total employees you’ve entered no ratings or 100% ratings for.

9 d Click “Export,” to export the report into excel , pdf, power point, etc.

Historical Ratings

My Organization

DY_Goals_and_Performance_Dashboard

To view additional Goal and Performance reports, click on one of the below links:

[Goal Plan Validation](#) **10 a** [Historical Performance Ratings](#) [Goal Details by Manager](#)

Goal Plan Year: Goal Type: All Manager: All AIP Category: Include AIP Only **Apply**

Goal Summary **Detail Records**

AIP Category: Include AIP Only				
Manager	Manager Number	Total Employees with Goals	Total Employees without Goals	Total Count

Historical Performance Ratings

10 b

Employee	Employee ID	Manager Name	Secondary Job Title	2015 Performance Rating	2014 Performance Rating	2013 Performance Rating
----------	-------------	--------------	---------------------	-------------------------	-------------------------	-------------------------

10 c Return -Refresh -Print **Export** Rows 1 - 25

- PDF
- Excel
- Powerpoint
 - Powerpoint 2003
 - Powerpoint 2007+
- Web Archive (.mht)
- Data

10 a Click here to access the “Historical Performance Ratings” report.

10 b View information regarding your employee’s performance ratings history.

10 c Click “Export,” to export the report into excel , pdf, power point, etc.