

# Oracle

## Talent Management Cloud Using Performance Management

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**Release 12**

This guide also applies to on-premises  
implementations

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# Preface

This preface introduces information sources that can help you use the application.

## Oracle Applications Help

Use the help icon  to access Oracle Applications Help in the application. If you don't see any help icons on your page, click the Show Help icon  in the global header. Not all pages have help icons. You can also access Oracle Applications Help at <https://fusionhelp.oracle.com>.

## Using Applications Help

 **Watch:** This video tutorial shows you how to find help and use help features.

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- **Community:** Use [Oracle Applications Customer Connect](#) to get information from experts at Oracle, the partner community, and other users.
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# 1 Performance Evaluation

## Evaluate Worker Performance: Overview

In the Evaluate Worker Performance activity, managers, workers, and participants can evaluate workers on goals and competencies according to the scoring method used by your organization. Human resource (HR) specialists and managers can perform administrative tasks to maintain worker performance documents to maximize efficiency and prevent bottlenecks.

Managers and workers create performance documents to evaluate workers. As part of the evaluation, they can:

- Create performance documents to evaluate workers.
- Set goals and competencies in a performance document, on which to evaluate and rate workers.
- Share documents to enhance workflow between workers and managers.
- Conduct and track review meetings, and process approvals.
- Maintain worker performance documents to maximize efficiency and prevent bottlenecks, for example, by canceling or reopening documents, or transferring collaboration status between worker and manager.

## Record Requirements

The performance management business process requires that workers have a line manager so managers and workers can create and manage performance documents.

To perform administrative tasks, HR specialists must have a person record.

## Maintenance and Monitoring Tasks

HR specialists and managers use maintenance and monitoring tasks to keep the performance evaluation process moving when there is an interruption or mistake, such as a worker submitting a document prematurely for approval. HR specialists can perform the tasks for workers who belong to the organization to which the HR specialist has access. Managers can perform the tasks for workers whose performance documents they are managing. This table lists the maintenance tasks available to HR specialists and managers.

Task	HR Specialist	Manager	Description
Create Performance Documents	Yes	No	Create a performance document for any worker within the organization for which the HR specialist has access. They can create different performance documents, such as annual and project evaluations, for each assignment for a worker. If a worker has multiple assignments, they can create a separate performance document for each assignment.

Task	HR Specialist	Manager	Description
Send E-Mail Notification	Yes	No	Send e-mail notifications throughout the selected organization to remind workers and managers of upcoming events and tasks in the performance management business process.
Transfer Performance Documents	Yes	Yes	Transfer a worker's performance document from one manager to another when, for example, the worker is assigned to a new manager, or the manager leaves the organization. HR specialists can transfer multiple performance documents at one time.
Transfer Set Goals Collaboration Status	Yes	No	Change the collaboration status for the Set Goals task by selecting either the manager or worker, so that the selected role can continue working on the performance document.
Change Due Date	Yes	No	Edit the due date of any task within a performance document that wasn't completed or canceled.
Change Feedback Due Date	Yes	Yes	When using feedback, edit the due date by which participants provide feedback if it isn't completed and the participants aren't locked out from providing feedback. Participants can still provide feedback after the due date.
Update Performance Task	Yes	No	<p>Move performance documents forward from the current task to another task, though the current task isn't completed. All performance documents you move in one action must be on the same current task. The status of the task that was moved past changes to Bypassed.</p> <p>Move performance documents back from tasks in any status to a previously-completed task. All tasks from the new current task forward reset to In Progress.</p>
Cancel Performance Documents	Yes	Yes	Cancel a performance document to remove it




Task	HR Specialist	Manager	Description
			from normal processing. Canceled documents aren't deleted permanently from the application. Any profile content that changed as a result of updates to this performance document reverts to its original state before the performance document was created. HR specialists can cancel multiple performance documents at one time.
Delete Performance Documents	Yes	Yes	Delete canceled performance documents permanently to remove documents that are no longer valid. HR specialists can delete multiple performance documents at one time.
Delete Participant Feedback	Yes	No	Remove any participant, regardless of the participant's feedback status, which also removes that participant's feedback for that worker.
Complete Performance Documents	Yes	Yes	Change a performance document to Completed status when a worker or manager hasn't completed all the tasks in a performance document, and has halted the final processing of the document.
Acknowledge Performance Document	Yes	Yes	Provide acknowledgment for the performance document on behalf of a worker when the worker doesn't confirm receiving the document. The performance document status changes to Acknowledged, and the performance management process can continue.
Acknowledge Review Meeting	Yes	No	Confirm that a review meeting or discussion was held on behalf of a worker when the worker doesn't confirm the meeting. The status of the review meeting changes to Acknowledged, and the performance management process can continue.
Reopen Performance Documents	Yes	Yes	Reopen a completed or canceled performance document so that the manager or worker can continue to evaluate the worker. Reopening

Task	HR Specialist	Manager	Description
			a document changes its status to In Progress.
Restore Performance Documents	Yes	Yes	Restore any qualified canceled performance document to Completed status. Qualified performance documents are those that had the Completed status before being canceled. The profile content that changed when the performance document was canceled is restored.
Determine Worker Eligibility for Performance Documents	Yes	No	Process or change eligibility for performance documents for a specified worker.
Reset Evaluation Status	No	Yes	Reset the status of the worker self-evaluation within a performance document so the worker can continue to work on the evaluation.
Monitor Missing Performance Documents	Yes	No	Search to find workers and managers who haven't started their performance documents and create the missing performance documents. You can create a performance document for an individual, or multiple managers and workers. Send e-mail notifications to the workers and managers reminding them to work on the performance documents.
Monitor Late Tasks in Performance Documents	Yes	No	Search performance documents for tasks that are late and edit task due dates. Send e-mail notifications to the workers and managers reminding them to work on the performance documents.

All roles access all tasks from the Performance Management work area.

## Filtering Data in the Performance Management Work Area

 **Watch:** This tutorial shows you how to filter workers, performance documents, and analytic data in the Performance Management work area.

## Creating Performance Documents: Points to Consider

Human resource (HR) specialists, managers, and workers, can create performance documents for workers. When they create the document, all goals and competencies that are configured to appear in the document are added to the document.

Either managers or workers create performance documents for subsequent periods if a task to set next period goals is part of the task flow.

### Human Resource Specialist Creates Performance Document for Worker

HR specialists can create:

- Performance documents for anyone to whom they have security access
- Only one performance document at a time for a specific worker on the Create Performance Documents page in the Performance Management work area
- The same performance document for multiple workers after searching on the Monitor Missing Performance Documents page in the Performance Management work area to find workers and managers who haven't started their performance documents
- Only one specific performance document, such as for an annual evaluation for a worker or manager for each assignment, but can create other performance documents for an assignment, such as for a particular project
- An additional performance document for each assignment if the person has more than one assignment
- Performance documents for a suspended or terminated worker or assignment

When the HR specialist creates a performance document, it's ready when the worker or manager begins the evaluation. If notifications are enabled, the manager and worker receive notification when a document is created.

Whether the HR specialist, the manager, or the worker creates the performance document, the worker or manager can open it when the first task is available to that role. For example, assume the first scheduled task of a performance document is Worker Self-Evaluation, which the worker performs. The document is configured so that the following task is Evaluate Worker, which the manager performs, and concurrent tasks aren't configured. The manager can't open the document to start the Evaluate Worker task until the worker completes the Worker Self-Evaluation task.

### Manager Creates Performance Document for Worker

Managers create performance documents on the My Manager Evaluations page in the Performance Management work area by clicking the **Begin** button for a task in the document. They create documents for direct reports, or workers who are reporting to them for a particular performance document, such as for a particular assignment. If notifications are enabled, the worker receives notification when the manager creates a document.

If the manager's direct reports have different job assignments, the manager can create a different performance document for each assignment.

### Worker Creates Performance Document for Self

Workers create performance documents on the My Evaluations page in the Performance Management work area. If a performance document was not created by the HR specialist or manager, then the worker can create the document by clicking the **Begin** button for a task in the document. If notifications are enabled, the manager receives notification when the worker creates a document.

## Manager or Worker Creates Next Period Performance Document

If a task for creating next period goals is included in a performance document, either the worker or manager can create the performance document for the subsequent period. However, the ability to open the document and create goals depends on how the document is configured. The document for the subsequent period can be configured so that either the manager or worker, or both can set next period goals.

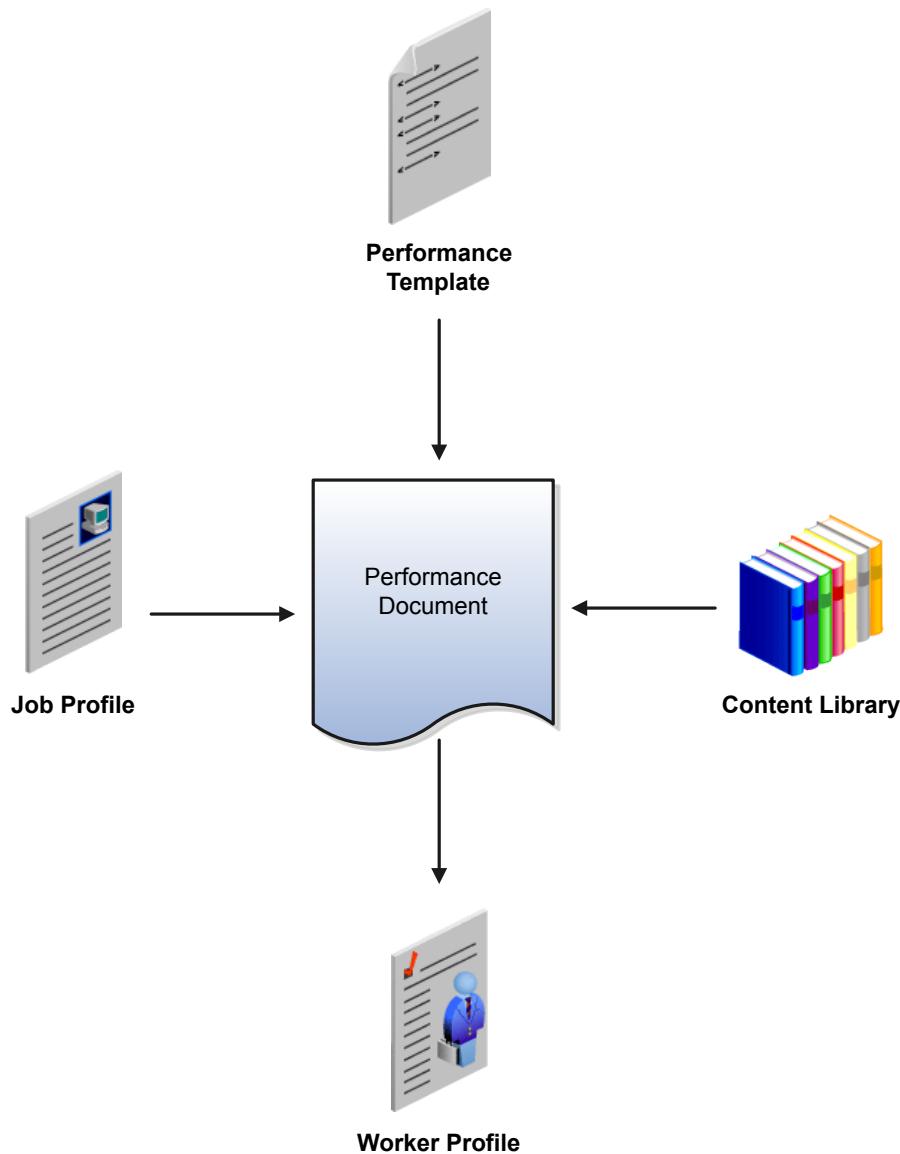
### *Related Topics*

- [How can I create a performance document for the terminated assignment of a worker?](#)

## Performance Documents: How They Work with Profiles

During a performance evaluation, the line manager or worker can update a performance document to include competencies from the worker's job profile and content library. When the performance document is completed the worker's person profile is updated to reflect competency proficiency levels in the performance document.

This figure illustrates the sources of competencies for the performance document, and how profiles are updated from the performance document.



## Adding and Updating Profile Content in the Performance Document

When created, the performance document may contain competencies that the performance template is configured to provide. These can include competencies from the content library or from the worker's job profile. During the evaluation process workers and managers can add additional competencies from the content library. They can also update the performance document to reflect any changes in job competencies, to the document to ensure that they have the most recent content. The ability to add and update competencies from these sources depends on the settings for the template used to generate the performance document.

To update competencies in the performance document, they use the **Update Goals and Competencies** action on the pages used to evaluate the worker or set document content. However, they must remove previously-added competencies manually from the performance document.

When adding competencies by updating from the job profile, only those that are associated with the job to which the performance document applies are added. Competencies associated with profiles for which the worker has another active performance document are not added. However, managers and workers can add these competencies directly to the performance document by adding them from the content library.

## Updating Profiles from a Completed Evaluation

When the performance document is completed the application updates the worker's profile to include the changes made in the performance document, if the performance document is configured to do so. Updated content includes the overall rating, competencies and their rating levels provided by the manager, and the competencies and goals section ratings. The ratings provided by the worker are not included. After the performance document is completed, it becomes a static document, and any changes to the job competencies are not reflected in the performance document.

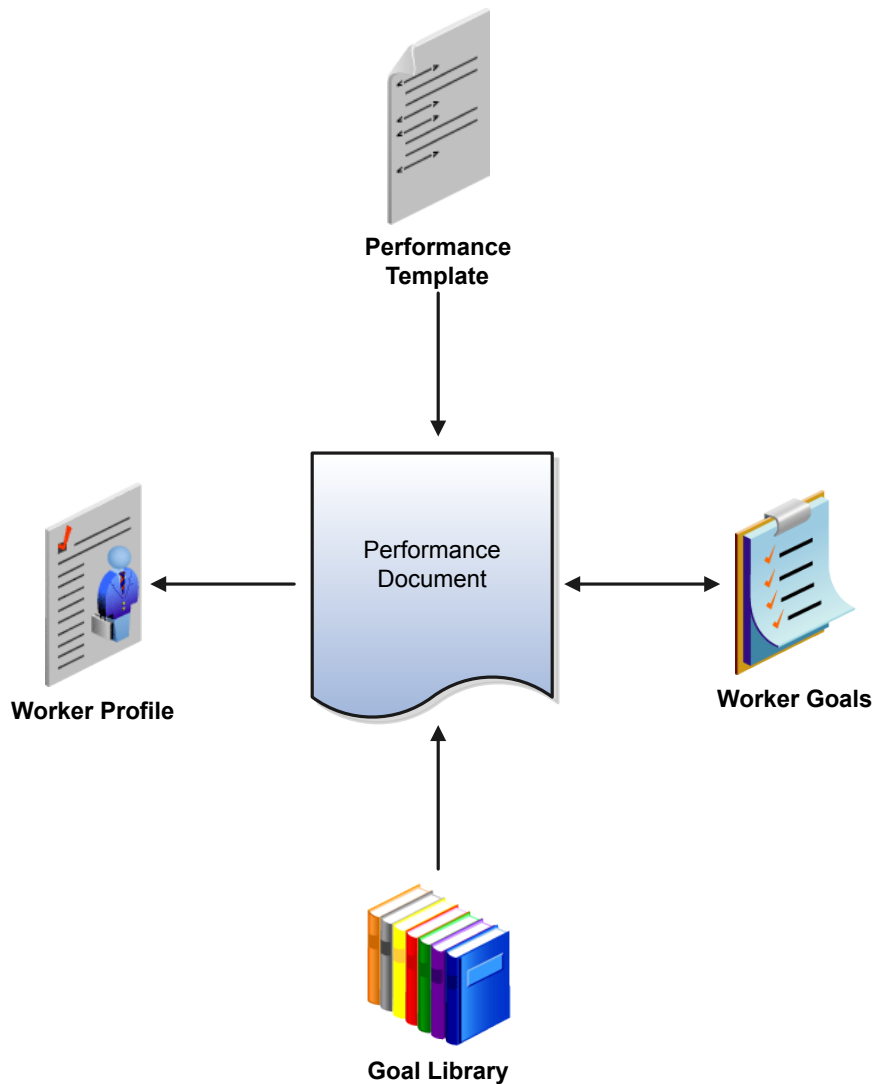
### *Related Topics*

- [Setting Up the Performance Template: Critical Choices](#)

## Performance Documents: How They Work with Goals

During a performance evaluation, the line manager or worker can update a performance document to include performance goals. Goals can be created directly in the performance document, or additionally, if Oracle Fusion Goal Management is used, added from the goal library and worker's goals. Workers and managers can maintain goals either in the performance document or using the Goal Management business process, and the goals are updated in both locations.

The figure shows how performance documents integrate with Goal Management, and how goals update the worker profile.



## Manager Record Requirements

To use the performance business process to manage performance documents, workers must have a line manager.

## Adding Goals to the Performance Document

Depending on configuration, goals can be added to performance documents in four ways:

- The performance template can include goals that are added directly to the performance document
- Workers and managers can add goals directly to a performance document
- Workers and managers can import goals from the workers' other performance documents

- Workers' goals from Goal Management populate the performance document

When created, the performance document may contain goals that the performance template is configured to provide. If Goal Management is used, the goals may include the worker's own goals and others selected from the goal library.

During the evaluation process the worker and manager can create goals, and add goals from the goal library, if it's enabled. They can also use the Import Goals and Competencies action to copy the worker's goals (but not ratings) from another of the worker's performance documents.

Performance goals created in a performance document are not added to the goal library. The performance goal can be viewed from the workers' portrait and on all other pages where the goal is included except in the library.

## Updating Performance Documents from Goal Management

Performance goals that workers or managers add or edit in Goal Management or performance documents are maintained such that they are consistent in both applications. For example, primary goal characteristics, such as the goal name, description, success criteria, and completion date, are kept identical in both locations. Any attachments to goals are also displayed in the performance document. The performance goal details held in performance documents and the Goal Management component have some differences:

- Goal ratings that the worker or manager provide in the performance document aren't available on the Goal Management pages.
- Goal weights added on the Goal Management pages are added to the performance document only when the goal is initially added to the document; afterward, weights are maintained independently.
- Comments made in the Ratings and Comments region of the performance document do not show on the goal management pages; however comments from the Goal Management pages appear in the performance document.

Workers and managers can add performance goals on the Goal Management pages and the goals are pulled into the workers' performance documents when the documents are created. Goal plans are required to manage goals in Goal Management. The goals in a goal plan associated with the review period and document type selected for the performance document appear in the document when it's created.

When managers or workers edit the worker's existing goals in Goal Management, the changes are reflected in the performance document when it's opened. To copy new goals into the performance document from the goal management business process they must use the Update Goals and Competencies action in the performance document. The Update Goals and Competencies action creates a new goal, but copies its key attributes from an existing goal in another performance document. The action is found on the pages used to evaluate the worker or set document content. Goals are not automatically removed from the performance document and must be manually removed.

## Updating Goal Management from Performance Documents

Updates made to the performance document are displayed in Goal Management when the performance document is saved or submitted.

If a worker or manager adds a goal to the performance document, they can select the goal plan to which to add the goal. The selected goal plan can be different than the goal plan associated with the performance document.

## Updating Profiles from a Completed Evaluation

When the performance document is completed the application updates the worker's profile to include the goals added to the performance document, if the performance document is configured to do so. Updated content includes the goals section rating. Ratings for individual goals are maintained in the performance document only.



## Completing Goals in the Performance Document

When the performance document is completed the goals are updated in Goal Management. After that process concludes, managers and workers can no longer update goals in the performance document either directly, or by using Goal Management. They can continue to add or update goals in Goal Management, but those changes are not reflected in the performance document.

## Setting Up the Performance Template to Use Goals

To manage goals in performance documents, implementors or HR specialists must:

- Create a Goals performance template section.
- Add the Goals performance template selection to the performance template.

To use Goal Management and the goal library with performance documents, they must also:

- Enable the Goal Management Business Process Enabled (HRG\_USE\_GOAL\_MANAGEMENT) profile option using the Manage Administrator Profile Values task.
- Enable the Goal Library Enabled (HRG\_ENABLE\_GOAL\_LIBRARY) profile option.
- Select the **Populate with worker goals** check box in the Goals performance template section.
- Select a review period and performance document type for the template associated with a goal plan for the performance template period.

### Related Topics

- [Setting Up the Performance Template: Critical Choices](#)

## Removing Goals Contained in a Performance Document: Explained

The role of a person who added a goal to a performance document, and where they added it, determine who can remove the goal, and from where.

Only managers and workers can remove goals from performance documents. They must remove goals manually directly from a performance document. No process exists to remove goals automatically from performance documents when updating either the documents or worker goals in Goal Management.

The following table describes scenarios in which a goal is added to a performance document and who can remove that goal from the performance document, Goal Management, or both.

Scenario	Description (who can remove the goal)
The manager rates a worker on the goal in the worker's performance document.	The worker can't remove the goal from the performance document.
The worker added the goal to the performance document or his goal list in Goal Management.	The worker can remove the goal from the performance document and also delete it from the worker's goals list in Goal Management. Removing the goal from the performance document doesn't remove it automatically from the worker's goal list.

Scenario	Description (who can remove the goal)
	The manager can remove the goal from the performance document but can't delete it from the worker's goals list in Goal Management.
The worker's manager added the goal to the performance document or the worker's goal list in Goal Management.	<p>The worker can't remove the goal from the performance document.</p> <p>The manager can remove the goal from the performance document and also delete it from the worker's goals list in Goal Management. Removing the goal from the performance document doesn't remove it automatically from the worker's goal list.</p>
The HR specialist added the goal as a specific content item to a performance template and didn't mark it as required in the performance template.	<p>The worker can't remove the goal from the performance document.</p> <p>The manager can remove the goal from the performance document and also delete it from the worker's goals list in Goal Management. Removing the goal from the performance document doesn't remove it automatically from the worker's goal list.</p>
The HR specialist added the goal as a specific content item to a performance template and marked it as required in the performance template.	Neither the manager nor the worker can remove the goal from the performance document.
Someone other than the worker's manager added the goal to the worker's goal list and included the goal in the worker's performance document based on performance template settings.	Neither the manager nor the worker can remove the goal from the performance document.

## Feedback Requests: Explained

Using the Manage Participant Feedback task, managers and workers can request and view participant feedback and monitor participant feedback status. Participant feedback enables people other than the worker, or the worker's manager, to provide ratings and comments on worker overall performance, competencies, and goals, and respond to a questionnaire. The availability of participant feedback and which roles can perform the tasks are determined by the configuration of the performance document by the human resource (HR) specialist. The Manage Participant Feedback task is available from the My Manager Evaluations and My Evaluations pages in the Performance Management work area.

Managers can manage participant feedback for a performance document for any person whose performance document they're managing, such as direct reports, or workers for whom they're managing a particular document. Typically these are direct reports, but could also include, for example, workers who work on particular projects for another manager. A worker manages participant feedback only for participants who provide feedback about the worker.

Depending on configuration, managers and workers can:

- Add and remove participants
- Select roles for the participants
- Preview the questionnaire and view feedback
- Add questions to the questionnaire
- Send participant requests

Managers can also lock participant feedback.

## Adding and Removing Participants

As a manager or worker, you can add participants, including matrix managers who weren't automatically added, to the list of people who are eligible to provide feedback about the worker. You can add any number of participants to the list of participants. You can add a participant more than once for the same document, either using the same role or another role. If a minimum number is required, it's only a guideline; the task can be completed without the minimum required feedback.

You can remove participants from the list before the participants have started to provide feedback. After the participant has saved or submitted feedback only the HR specialist can remove the participant and feedback.

## Selecting the Role for the Participant

When you add a participant, you're required to select the role for the participant. For questionnaires, the role determines which questionnaire that the participant uses to provide feedback. You can change the participant role if the participant hasn't started and saved or submitted the feedback.

## Previewing the Questionnaire and Viewing Feedback

You can view feedback provided by participants and preview the questionnaire available for a participant role by clicking the **View Feedback** link, if permitted to do so. Depending on the configuration of the performance document, you may be able to view ratings, comments, or both, for overall performance, competencies, or goals, along with questionnaire responses. If the performance document includes questionnaires and you're prevented from viewing responses, you can only see the questions.

## Adding Questions to the Questionnaire

You can add questions that require text responses to questionnaires for participants you select, if permitted to do so. You can add the question for individual participants, or all participants using a particular questionnaire. The question appears only on the questionnaires for the participants you select for the current feedback request. It doesn't appear on other versions of the questionnaire used by these or any other participants.

You add a question by doing one of the following:

- Selecting a participant name on the Manage Feedback Participant name page and clicking the **Add Question** button. Then you can select the participants using that questionnaire for whom you want to add the question.
- Selecting the **View Feedback** button to preview the questionnaire, then adding the question directly to the questionnaire.

You can only add questions to a questionnaire which a participant hasn't saved or submitted.

## Sending Participant Requests

After adding participants to the list and selecting the roles, you must send a request to inform the participants that you're asking them to provide feedback. Managers can always send a request directly to participants. Workers can also send requests directly to participants if allowed. Otherwise, when the worker clicks the **Send Request** button, the manager is notified of the request, and the participant name appears on the manager's Manage Participant Feedback page. The manager then sends the request to the participant.

The participant receives notification of the request, and the request is added to the Performance Manager and Performance Worker Overview pages. There, the participant can select a link to open the performance document and begin providing feedback.

## Locking Participant Feedback

Managers can lock participant feedback to prevent participants from accessing the performance document to start or continue providing feedback. Managers can do this, for example, when they have sufficient feedback to complete their evaluations of workers, or they have more participants than required. Once locked, the feedback request can't be unlocked.

When you lock participants, the status for the task to provide feedback changes to **Completed** for that participant. The worker name is removed from the My Feedback Requests page in the Performance Management work area, depending on if the participant is a manager or worker. If the manager decides to gather more feedback from the participant, the manager or worker must issue another request for feedback to the participant.

## Writing Assistant: How it Works with Performance Documents

Managers use the Writing Assistant feature to assist them in writing useful comments in the performance documents of workers during a performance evaluation. The Writing Assistant provides suggestions that are associated with competencies and their correlated proficiency levels to managers. The suggestions help managers describe observed worker actions, and those workers aspire to perform.

Using Writing Assistant, managers can select a proficiency level for a competency and view suggested comments based on the selected proficiency level, or for the competency as a whole. They can then copy and edit the comments.

## Accessing Writing Assistant on the Performance Document

You access Writing Assistant by clicking the **Suggest Comments** button on the competencies section tab of the performance document. On the Suggest Comments dialog that appears, you can select one of the available suggestion types to view and copy available suggestions:

- Feedback suggestions
- Development tips
- Worker comments

This table shows the available suggestion types, the source of the suggestions, and examples of how to use them.

Suggestion Type	Source	Use Case Example
Feedback Suggestions	Associated with the competency proficiency level selected by the manager.	The competency you are rating has five rating levels: 1 through 5. You select level 3 and access the Writing Assistant. The feedback suggestion is the one associated with level 3.
Development Tips	Associated with the competency.	You want to help the worker increase proficiency for the competency and select the development tip for the competency. These are also available when only comments or performance ratings are used instead of rating proficiency levels.
Worker Comments	Provided by worker during the evaluation.	You can copy and edit the comments to use worker comments as a basis for your own.

Suggestion Type	Source	Use Case Example
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You can view the available suggestions and select one or more to paste in the Manager Comments section of the performance document. If you close the dialog, then reopen it and copy another suggestion, the new one is added to the previously copied content. After copying suggestions, you can edit them as required.

## Using only Comments in a Competencies Section


If the competencies section is configured to use comments only, and not proficiency level ratings, for individual content items, only development tips are available. Feedback suggestions aren't available because they rely on proficiency levels. However, the Copy Worker Comments feature is available.

# Using Matrix Management with Performance Evaluations: Explained

Matrix management functionality allows managers other than the worker's line manager to evaluate the worker, and view ratings and comments submitted by the worker, and other managers and participants.

## Matrix Managers

A matrix manager is a manager of a type other than line manager (for example, project manager, team manager, functional manager). You add manager types to workers using the Manage Employment task in the Person Management work area.

 **Note:** In some cases, the line manager might not be the manager who controls the performance document. In this topic, the line manager is assumed to be the performance document manager.

In a performance evaluation, matrix managers are participants with a specific configured role that gives them the added ability to view ratings and comments submitted by others. You create the performance role using the Manage Performance Roles task in the Setup and Maintenance work area.

## Tasks

During a performance evaluation, matrix managers can:

- Evaluate the worker by providing ratings and comments
- Review the submitted ratings, comments, and questionnaire responses provided by the worker, other managers, and other participants

Matrix managers can only provide and view ratings and comments in sections to which they are granted access in the performance template. They can't add or remove content items, such as competencies or goals, from a performance document.

## Notification and Access

When the worker submits the completed self-evaluation, matrix managers receive notification, if that notification option is enabled. The matrix manager accesses the document from the My Feedback Requests tab in the Performance Management work area. You set up the Performance Management notifications in the Setup and Maintenance work area.

On the Manage Participant Feedback page, line managers (and workers, if configured to do so), can view the names of the matrix managers.

They can add matrix managers as participants to evaluation on the same page. Line managers can also remove matrix managers, even if they were automatically assigned. If the line manager or worker adds a matrix manager as a reviewer, they must send a notification to alert the matrix manager that the document is available for review.

### *Related Topics*

- [Configuring Matrix Management for Performance Documents: Procedure](#)

## Social Networking with Performance Documents: Explained

If the performance document has a **Social** link, you can invite others to collaborate about the performance review using social collaboration. Conversations remain with the performance document as a historical record

Examples of collaboration:

- A worker asks the manager about how to complete the performance document goals, competencies, and so on.
- The manager points out to the worker some changes that should be made to the performance document.
- A worker asks peers for advice on setting goals or rating a competency.

## Collaborating About Performance Documents

Tips for collaborating:

- To get started, click **Social** on the performance document to collaborate. Click the **Share** button, or click **Join** if collaboration is in progress.
- Click the name of the document to access its wall, where you can start conversations and add members.
- After collaboration starts for a performance document:
  - Anyone at your company can be invited to participate in a conversation about it.
  - A peer can only participate in conversations after being invited as a member.
  - The worker and the manager can initiate conversations and invite members.
- On the wall of the performance document, everyone invited can view basic attributes of the document and post documents and comments that all members can see.

### *Related Topics*

- [What does social networking have to do with my job?](#)

# Performance Document Overall Completion Progress Analytics: Explained

Managers can view the completion progress of performance documents they manage in the overall completion progress analytics. The analytics appear at the top of the My Manager Evaluations page. This topic explains the criteria used to determine what appears in the analytics. Select **My Workforce - Performance - My Manager Evaluations**.

Two types of completion progress analytics appear: one analytic for total documents, and one for each performance document. The analytics display the completion progress for all those performance documents that appear on the My Manager Evaluations page.

## Total Documents Analytic

The total documents analytic displays two numbers: the number of completed documents on the left, and total number of documents on the right. The total number of documents includes those with one or more of these attributes:

- The signed-in manager is the manager of the performance documents.
- Workers are eligible for the documents using eligibility profiles.
- The worker's assignment is active for the entire date period of the performance document.
- The worker's assignment is inactive or suspended.

The total count doesn't include:

- Performance documents for workers who are managed by the signed-in manager, but whose documents are managed by another manager, such as a project manager
- Canceled performance documents

## Individual Performance Document Analytics

The analytics for individual performance documents use the same criteria as for the total number of documents, but display the numbers for a single document.

# Search Performance Documents by Managers and Workers: Explained

You can use the Search Performance Documents feature to locate a specific performance document and open it to view or work on it. Search criteria and results vary for managers and workers. Managers access the feature from the Search for My and My Team Performance Documents panel tab in the Performance work area. Workers access it from the Search for My Performance Document panel tab in the Performance Management work area.

## Search Criteria

Managers can search by worker name and performance document name. Workers can only search by performance document name because they're not eligible to view documents for other workers.

When managers use advanced search, the Search for My and My Team Performance Documents page opens. When workers use advanced search, the Search for My Performance Document page opens. These pages have additional search fields and the search results contain columns with more document information than basic search.

When you use basic search, both the **Worker Name** and **Performance Document Name** fields add a percent sign to the end of the search as a wildcard. Both fields are configured so the search parameters are set to **Starts with**, so the results include only worker or performance document names that begin with the text you entered. Use advanced search to do a keyword search; enter the percent sign as the wildcard where appropriate in the name to find the complete name.

## Terminated Assignments

Using advanced search, managers and workers can search for performance documents for terminated assignments. Managers can search for worker documents for both:

- Workers' terminated assignments
- Performance documents where the manager assignment evaluating the worker is now terminated

Workers can search for their own performance documents for their terminated assignments.

## Search Results

Search results include all performance documents that the role is eligible to view that fit the search criteria. For example, when managers and workers search for the same performance document, the following applies:

- Managers can view only those documents for their direct reports or those for which they're assigned to manage.
- Workers can view only their own documents.

For workers and managers, the results can include documents in addition to those that appear on the My Evaluations and My Manager Evaluations pages. The results also include documents that fall outside the date ranges set to restrict the number of documents that appear on those pages. They can use search to view more distant past and future documents.

In the search results, when managers or workers click the performance document name, the document opens to the current task, or the last task they're eligible to perform. For example, when a worker clicks the performance document name, if the current task is Worker Self-Evaluation, the document opens to that page. The worker can continue the evaluation. If the current task is performed by the manager, the document opens to the last task the worker completed. For completed documents, the document opens to the last completed task in the process flow.

# Search Performance Documents by Human Resource Specialists: Explained

Human resource (HR) specialists can use the Search for My Organization Performance Documents task to locate a specific performance document and open it to view it. You can access the task from the task list on the Performance work area.

## Search Criteria

You can search by worker name and performance document name. Using advanced search, you can search using additional criteria.

When you use basic search, both the **Worker Name** and **Performance Document Name** fields add a percent sign to the end of the search as a wildcard. Both fields are configured so the search parameters are set to **Starts with**, so the results



include only worker or performance document names that begin with the text you entered. Use advanced search to do a keyword search; enter the percent sign as the wildcard where appropriate in the name to find the complete name.

## Search Results

When HR specialists search for a performance document, the results include all documents for all workers to whom they have access according to their data security profile. When they click the performance document name, a read-only view of the document opens to the current task. If the document is completed, it opens to the final completed task.

## Terminated Assignments

You can select the **Include Terminated Assignments and Workers** check box to search for worker documents for both:

- Workers' terminated assignments
- Performance documents where the manager assignment evaluating the worker is now terminated

# Managing Performance Documents for Inactive Assignments: Explained

You may have to create or open a performance document for a worker whose assignment is either inactive due to termination or transfer, or suspended. This topic describes how and where to search, create, and open those performance documents.

## Terminated Assignments

You can search and create performance documents for terminated assignments that are either:

- Managed by a terminated manager
- Assigned to a terminated worker

Managers and workers can find performance documents for terminated assignments using the **Filter** dialog box you open from the My Manager Evaluations and My Evaluations pages. You select the **Include Terminated Assignments and Workers** check box along with other criteria to return the relevant document. You can view and edit the document when it's added to your list of performance documents on the My Manager Evaluations and My Evaluations pages.

Human Resource (HR) specialists and managers can find documents for terminated assignments on the Search Performance Documents page and administrative task pages by selecting the **Include Terminated Assignments and Workers** check box on the Advanced Search page and selecting other search criteria to return relevant documents.

HR specialists can search and create documents for terminated assignments using the Create Performance Documents task.

## Suspended and Inactive Assignments

Suspended assignments are treated the same as active assignments: they appear when you search using a worker or performance document name, or other search criteria. You can search using any task where you search for performance documents.

Assignments that are inactive as a result of global or legal entity transfer are also treated the same as active assignments on the My Manager Evaluations and My Evaluations pages. On other search pages, you must select the Include Terminated Assignments check box to include them in returns.

 **Note:** Terminated assignments are also inactive assignments with a different action code.

## Assignment Status Visibility

You may have to use the **View** menu to add the **Assignment Name** and **Worker Assignment Status** columns to distinguish the inactive, suspended, or terminated assignments. On the My Evaluations and My Manager Evaluations pages, the status appears with the document on the document list.

## Security Restrictions

For HR specialists, line managers and workers, searches only return documents to which they have security access. For example, managers can only manage documents for inactive workers if they're the performance document manager.

## Autosaving Performance Documents: Explained

While you update performance documents, they automatically save at a defined interval to preserve your work. Autosaving preserves your ratings, comments, and any changes to content, such as adding competencies or goals.

### When Autosaving Takes Effect

When the autosave period is shorter than the session timeout, the performance document autosaves before the timeout so no Performance data is lost.

### Autosaving Interval

The application autosaves at the interval specified in the specified in the Performance Autosave Interval profile option. The profile option value indicates in minutes how frequently autosave is performed. The autosave default is 10 minutes. Implementors or HR specialists can increase or decrease the frequency using the Performance Autosave Interval profile option. To edit profile options, Implementors or HR specialists can use the Manage Performance Profile Options task in the Setup and Maintenance work area.

### Last Saved Time Stamp

A last saved time stamp appears on the performance document when you save the document manually, or it autosaves.

#### *Related Topics*

- [Oracle Fusion Performance Management Profile Options: Critical Choices](#)

## Actions for Performance Document Approvals: Explained

When a manager or worker submits a performance document for approval, approvers receive notification that the document is ready for approval. They can then approve or reject the document in multiple locations. They can also perform other

actions, such as requesting more information, or reassigning or delegating the approval to another manager. Human resource (HR) specialists can bypass the approval task for performance documents.

## Approval Actions and Locations

As part of the approval process, approvers can take a number of actions on a performance document. These actions include:

- Approve
- Reject
- Request Information
- Reassign
- Delegate
- Suspend
- Resume

The locations where approvers can perform approval process actions are shown in the table.

Location	Details
Worklist and e-mail notifications	Use the Actions menu to approve or reject the document, or perform other approval process actions. Request Information isn't available in e-mail. The notifications also contain a link to the performance document, where you can approve or reject it.
Performance document	Select the <b>Approve</b> or <b>Reject</b> buttons on the performance document. No other approval process actions are available on the performance document.
My Organization page	Approvers who are managers can approve, reject, or perform other approval process actions in the Performance Document Approvals section on the My Organization page.

## Task Status After Rejection

If a performance document is rejected, the Manager Evaluation of Workers task is set to **In progress** so the manager can update the document. If you need to change the status of other tasks before resubmitting the manager evaluation, the HR specialist can use the Update Performance Tasks task in the Performance Management work area.

## Reassigning and Delegating Approval

Approvers can either reassign or delegate approval to another manager. Reassignment and delegation are valid only for one approval task. If a second approval task is required for a document, the normal approval process applies.

## Bypassing Approvals

The Approval task, along with other tasks, can be bypassed to continue the evaluation process when approvers are unable to approve the performance document, for example because they are unavailable. The HR specialist can advance the performance document to the next task using the Update Performance Task page in the Performance Management work area.

### Related Topics

- [Performance Process Flow Setup: Points to Consider](#)

- Defining Approvals for Human Capital Management: Explained
- Approval Management Configuration Options for Oracle Fusion Human Capital Management: Explained

## FAQs for Evaluate Worker Performance

### Why does the performance document contain competencies and goals before I have added any?

Your manager may have added competencies and performance goals directly to your performance document or imported them from other performance documents. Your manager may also have updated competencies from existing job competencies, or goals from your list of goals on your My Goals page, if it is available. When the document is created, it may also include job competencies, or other default competencies and goals if the template used to create the document is configured to include them. You can open performance documents from the Performance Management work area.

### Can I add items to, or remove items from, the performance document once the document content is shared?

Yes. Once the performance document content is shared when setting goals, managers and workers can add competencies and goals to, or remove them from, the performance document. Participants cannot add, remove, or edit content. You can open performance documents from the Performance Management work area.

### What's the difference between sharing and submitting performance document content?

Sharing content while setting goals in the performance document makes it available for further review by either the manager or worker. Submitting the content makes it available to use in the performance evaluation. After submitting the set goals task, neither the manager or worker can add or delete content as part of this task. You can open performance documents to share and submit them from the Performance Management work area.

### What happens if I import performance document content?

You're prompted to select either a past performance document or another current one from which to copy content to the document you're working on. The content that you import can include competencies, goals, or both, depending on how the performance document was configured. Ratings and comments in the document from which you're importing content aren't copied.

You can import performance documents on the Set Goals, Worker Self-Evaluation, and Manager Evaluation of Workers pages. You open performance documents from the Performance Management work area.

## What happens if I update performance document content?

The application updates the performance document to reflect any changes in other content sources since the document was created. Depending on how the performance document was configured, the updated content can include competencies, goals, or both. Competencies are updated from the worker's job profile. Goals are updated from the worker's goal list on the My Goals page, if it's available, and if the goals are specified to be included in performance documents.

When you update content, no goals or competencies are removed automatically from the performance document. You can only remove those manually.

You can update performance documents on the Set Goals, Worker Self-Evaluation, and Manager Evaluation of Workers pages. You can open performance documents from the Performance Management work area.

## Why can't I update the performance document content?

Because someone else is editing it. The document is locked when one user is updating the content. When the person who is working on the performance document shares it, then you can access and update it. You can share the document multiple times before submitting it to perform the evaluation and provide ratings. You can open performance documents from the Performance Management work area.

## Why can't I see my worker's comments and ratings?

You can see the comments and ratings a worker provides in the performance document after the worker completes the self-evaluation and submits the performance document. You can open performance documents from the Performance Management work area.

## Why did some of the performance ratings I provided change?

Performance document ratings may change if Oracle Fusion Compensation Management is configured to allow Compensation managers to update performance ratings for the overall rating, or Goals or Profile Content sections. You can change ratings only if the document isn't completed. You can override ratings updated from Compensation in the performance document. The ratings that appear in the performance document when you submit it are the final performance ratings for the document.

### *Related Topics*

- [Performance Ratings: Points to Consider](#)

## What happens if I bypass the worker self-evaluation?

You can continue to the next task in the performance document, such as performing the manager evaluation.

The worker can no longer update the performance document, including adding additional content, ratings, or comments.

The task status changes to **Bypassed**. The **Bypass Task** button appears on the manager view of the Worker Self-Evaluation page.

## How can I add content to a performance document after the worker submits it?

The manager can use multiple methods to add additional content to a performance document for the worker to evaluate after the worker submits the document. During the Manager Evaluation of Workers task, the manager can add content items to the performance document and click **Return to Worker** on the document.

The manager can also use the Reset Evaluation Status administrative task to reopen the performance document for the worker after adding items to it. Or, after adding content items, the manager can ask the human resource (HR) specialist to perform the Update Performance Tasks task to move the document back to an earlier task.

In all of these cases, the status of the Worker Self-Evaluation task changes to **In progress**. The worker can provide ratings and comments for the additional content items and the evaluation continues from that point. The Reset Evaluation Status and Update Performance Tasks administrative tasks are performed in the Performance Management worker area, where you also open performance documents.

## What happens if I don't request feedback from the minimum number of participants?

The evaluation isn't affected and the performance evaluation can be completed. The minimum number of participants is a guideline, and isn't enforced by the application. You request feedback from the Manage Participant Feedback page in a performance document. You open performance documents from the Performance Management work area.

## What happens if I change the participant role?

The participant can still access the performance document to provide ratings. For questionnaires, the participant can use a different questionnaire, with different questions, than the one associated with the previous selected participant role. Questionnaires are assigned to roles, not individuals. You can only change the role if the participant hasn't started providing feedback. You manage participant feedback on the Manage Participant Feedback page in a performance document. You open performance documents from the Performance Management work area.

## What happens if I add a question to a questionnaire for a participant?

The question that you create is only added to the questionnaires for the participants you select, and only for this specific feedback request. The question isn't added to the questionnaire template or any other use of this questionnaire for other feedback requests to the participant about other workers.

You add questions to questionnaires on the Manage Participant Feedback page in a performance document. You open performance documents from the Performance Management work area.

## Why can't I remove a participant?

You can't remove participants if their feedback is in progress or completed. Only your HR specialist can remove participants and their feedback if the participant has started it.

You manage participants on the Manage Participant Feedback page in a performance document. You open performance documents from the Performance Management work area.





## 2 Talent Profiles

### Managing Talent Profiles: Overview

Managers and HR specialists can maintain information within person profiles about the skills, qualifications, accomplishments, and career preferences of their workers. They can also maintain information in model profiles about the targeted skills and qualifications of the jobs and positions within the company. Workers can manage their own careers by keeping their talent profiles current so that their skills, qualifications, accomplishments, and career preferences reflect their current performance and future career goals.

You manage a worker's talent profile on the worker's person spotlight. Depending on your role, to open a worker's person spotlight:

- Select **Directory - Directory**, search for the worker, and click the worker's name in the search results
- Select **My Team - My Team** and click the worker's name on the My Team page
- Select **My Team - Team Talent** and click the worker's name on the Team Talent page
- Select **My Team - Team Compensation** and click the worker's name on the Team Compensation page
- Open the person smart navigation window from application pages

This table lists the talent profile-related pages on person spotlight and their key features available to managers and HR specialists, and workers. Workers can open each page from the About Me work area in the Navigator.

Pages	Features for Managers and HR Specialists	Features for Workers
Skills and Qualifications	<ul style="list-style-type: none"> <li>• Use the competency gaps chart to compare the competencies of a worker to that of a job from the worker's interest list, to identify if the worker is a suitable candidate for the job or needs further training.</li> <li>• Review areas of expertise and other qualifications for workers.</li> </ul>	<ul style="list-style-type: none"> <li>• Use the competency gaps chart to compare their competencies to that of a job from their interest list, to identify whether they are suitable for a job or to identify training needs.</li> <li>• Identify areas of expertise, such as a specific software package.</li> <li>• Maintain competencies, degrees, and other accomplishments.</li> </ul>
Career Planning	<ul style="list-style-type: none"> <li>• Add jobs or positions to the interest lists of their workers.</li> <li>• Review career preference information for workers, such as job or job family of their next career move.</li> <li>• Review and edit talent ratings such as performance and potential of workers, and the risk and impact of losing them.</li> </ul>	<ul style="list-style-type: none"> <li>• Add jobs or positions to their interest lists.</li> <li>• View the suggestions list and determine whether to add any of the suggested jobs or positions to their interest list.</li> <li>• Identify career preferences such as the job or job family of their next career move.</li> </ul>

Managing talent-profile information in job and position profiles includes both creating the job and position profiles based on profile types, and editing the profiles when business requirements change. Job and position profiles identify the required skills, degrees, qualifications, and work requirements for each job and position within your enterprise.

### Related Topics

- [Talent Profile Summary: Explained](#)

## Compare Profiles and Find the Best Fit

### Comparing Items: Explained

Use comparison to quickly identify and evaluate differences between items. Compare any person, job, and position items. For example, you can compare a person with another person or with a job profile. You can compare items in the Profiles work area and on the talent review dashboard.

#### Selecting Items

The first item you select is the comparison base, and the items you select subsequently are secondary items. You can change the comparison base if required. The comparison displays the base item attributes, and indicates the differences between the attributes of the secondary items and the base items. .

#### Controlling Results

Data sets control which attributes are displayed for each item in the comparison. For example, you must select the School Education data set to display and compare a person's education details.

The information displayed in the comparison results is controlled by security access. For example, line managers can compare their direct reports and view their performance data in the comparison results. HR specialists can perform this comparison only if they have security access to the persons' performance information. You can change the effective date of comparison if you are either a line manager or an HR specialist.

### Performance Information in Comparison Results: Explained

The comparison displays the performance data of only those persons who are evaluated using the enterprise-wide designated rating model, because you can't compare persons who are evaluated using different rating models.

For each person, the comparison displays up to three performance documents. These performance documents include the latest document using the designated rating model plus the two most recent previous documents that use the same performance template as the latest document. However, the performance documents and performance periods for the persons being compared may be different. The comparison indicates the performance attributes' differences only if the performance documents are the same for the persons being compared.

### Best-Fit Analysis: Explained

The best-fit analysis includes the review of all profiles of the match type required and calculation of the overall score compared to the source profile. The overall score appears in the Overall Fit column in the results section on the Find Best Fit page. Employees, managers, and HR specialists can use the Best-Fit feature to match and compare profiles with the selected match criteria. The Best-Fit feature finds profiles that closely match the source profile (person or job). You can

associate both jobs and positions with the job profile type. Therefore, in a best-fit analysis, a job profile can be either a job or position.

## Best-Fit Analyses Types

The application supports the following four types of best-fit analyses:

- **Person to Job:** Using a person profile as the source profile, you can find the job that best fits a worker.  
Example: As a manager, use this tool to help a worker to identify job profiles for which the worker is best suited and decide the next career move.
- **Person to Person:** Using a person profile as the source profile, you can find the worker with skills that match that of a particular worker.  
Example: Your company is planning to launch new technology. As an HR specialist, you know a worker who has the required skill to use the new technology. To assess the scope of workers who need development in this particular skill, you can select the worker's profile. You can then use the Best-Fit feature to view a list of other workers who may come close to the skill requirements.
- **Job to Job:** Using a job profile as the source profile, you can find the job profile that closely matches a job profile.  
Example: As an HR specialist, you can use this tool to help locate jobs to identify areas for outplacement, training requirements, or areas of organizational strength.
- **Job to Person:** Using a job profile as the source profile, you can find the best-fit worker for a job.  
Example: As an HR specialist, you can use this tool to help locate the most qualified workers for a job opening within your company.

## The Best-Fit Feature Accessibility

The roles, privileges, and application settings determine the ability for a user to perform a type of best-fit analysis. The following table shows the Best-Fit feature accessibility for the most commonly used profile types.

Role	Can Perform Person to Job Analysis?	Can Perform Person to Person Analysis?	Can Perform Job to Job Analysis?	Can Perform Job to Person Analysis?
HR specialist	Yes	Yes	Yes	Yes
Manager	Yes (Limited to direct and dotted-line reports)	Yes	No	Yes
Worker	Yes	Yes (Limited to worker's own profile)	No	No

## Filtering Best-Fit Results

By default, the best-fit analysis results show all profiles that have 90% match or greater than the selected source profile. You can further filter the results to show by overall fit or by number of profiles. The results section of the best-fit analysis also has the **Show Fit by Criteria** option. Use this option to view which content types displayed in results meet or exceed the specified criteria percentage.

## Accessing the Best-Fit Feature as an HR Specialist: Procedure

Depending on the privileges associated with the HR specialist role, an HR specialist can find:

- The best-fit job or person for a person profile.
- The best-fit job or person for a job profile.

### Finding the Best-fit Job or Person for a Person

HR specialists can find the best-fit job or person for a person by using one of the following navigation paths:


- From the Person Profiles page:
  - a. Select **Navigators - My Workforce - Profiles**.
  - b. Select the Person Profiles tab, if not already selected, and search for the person profile.
  - c. Select the profile in the Results section.
  - d. From the Actions menu, click the corresponding link to find the best-fit job or person for the selected profile.
- From the Skills and Qualifications page:
  - a. Select **Navigators - My Workforce - Profiles**.
  - b. Click the Person Profiles tab, if not already selected, and search for the person profile.
  - c. Click the profile in the Results section to open the Skills and Qualifications page.
  - d. In the Related Links panel, click the corresponding link to find the best-fit job or person for the selected profile.


### Finding the Best-fit Job or Person for a Job Profile

HR specialists can find the best-fit job or person for a job profile, by using the Job Profiles page. This page includes all jobs and positions profiles associated with the job profile type.

To find the best-fit job or person for a job profile:

- From the Profiles page:
  - a. Select **My Workforce - Profiles**.
  - b. Select the Job Profiles tab, search for the job profile.
  - c. Select the profile in the Results section.
  - d. From the Actions menu, click the corresponding link to find the best-fit job or person for the selected profile.
- From the Select Candidates page when creating or editing a succession plan:
  - a. Select **Navigators - My Workforce - Succession Plans**.
  - b. Select the Succession Plans tab, if not already selected.
  - c. Click **Create** to create a plan, or select an existing plan and click **Edit** from the tab toolbar.
  - d. Enter or edit the necessary details and click **Next** to open the Select Candidates page for the succession plan.
  - e. On the page toolbar, click **Find Best Fit** to find the best fit person for a job profile and add the person as a candidate.

 **Note:** If a manager is the owner of a succession plan and has security privileges to access the Succession Management work area, the manager can also use this navigation to access the best-fit feature and add a candidate to the plan.

- From the Select Members page when creating or editing a talent pool:
    - a. Select **Navigators - My Workforce - Succession Plans**.
    - b. Select the Talent Pools tab.
    - c. Click **Create** to create a talent pool, or select an existing pool and click **Edit** from the tab toolbar.
    - d. Enter or edit the necessary details and click **Next** to open the Select Members page for the succession plan.
    - e. On the page toolbar, click **Find Best Fit** to find the best fit person for a job profile and add the person as a member.
-  **Note:** If a manager is the owner of a talent pool, the manager can also use this navigation to access the best-fit feature and add a member to the pool.

## Accessing the Best-Fit Feature as a Manager: Procedure

Depending on the privileges assigned to the manager role, managers can find the best-fit job or person for a person.

### Finding the Best-fit Job or Person for a Person

Managers can find the best-fit job or person for a person by using one of the following navigation paths:

- From the Team Talent page:
  - a. Select **Navigators - My Team - Team Talent**.
  - b. Click the link to a report to open the Skills and Qualifications page of the report.
  - c. In the Related Links panel on the Actions tab, click the corresponding link to find the best-fit job or person for your report.




**Tip:**

- From the My Team page:
  - a. Select **Navigators - My Team - My Team**.
  - b. Click the link to a report. The Employment Information page of the report opens.
  - c. Select **Actions - Talent Management** and then select the corresponding link to find the best-fit job or person for the selected profile.

## Accessing the Best-Fit Feature as a Worker: Procedure

Depending on the privileges assigned to the employee role, workers can:

- Find the best-fit job profile for their person profile.
- Add the job profile to their careers of interest list.

 **Note:** As a worker, if you find the person best suited to your profile, by default, the search results display your profile.

## Finding the Best-fit Job

Workers can use one of the following navigation paths to access the best-fit job feature:

- From the Talent Profile page:
  - a. Select **Navigator - About Me - Talent Profile**.
  - b. In the Related Links panel on the Actions tab, click the corresponding link to find the best-fit job for your role.

## Best Fit: How It's Calculated

The Best-Fit feature compares the selected profile content with that of target profiles to find a list of profiles that are the closest match. You find the best fit job or person using the best-fit feature accessible from application pages.

Example: As an HR specialist, you can use the Best-Fit feature to find the person best suited for a job. The initial best-fit analysis results include a list of the profiles with the highest percentage of matching qualities. You can further narrow down the results by changing the priority of content types or individual content items. You can then view the percentage match for each content type.

### How Best Fit Is Calculated

The best-fit analysis considers content items of only these predefined content types:

- Competencies
- Honors and awards
- Work requirements

 **Note:** The work requirements content type does not have content items.

- Languages

 **Note:** For languages, only the item Reading is considered in best-fit calculations.

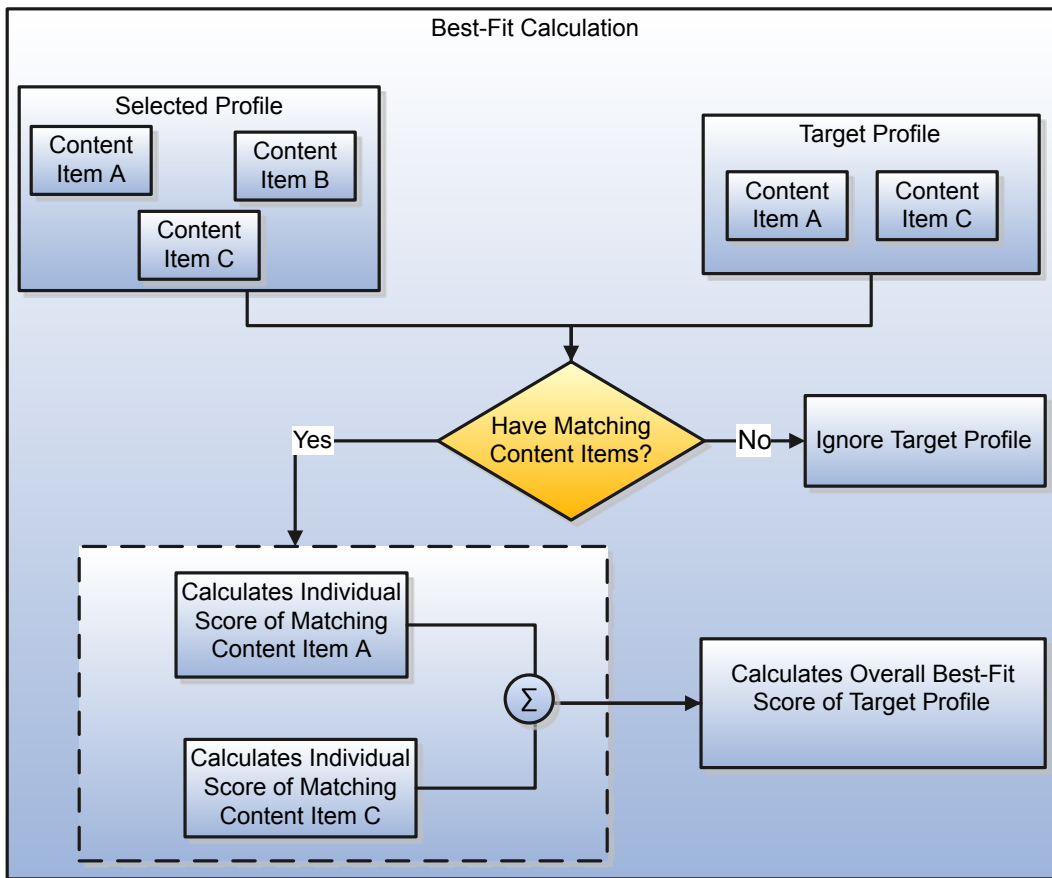
- Degrees
- Memberships
- Licenses and certifications

You can use the Best-Fit feature to calculate the overall score for a target profile. The application calculates the overall best-fit score of the target profile with respect to the selected source profile based. The overall score is based on the individual score of each matching content item of the selected profile.

## Overall Score in a Best-Fit Analysis: How It's Calculated

The Best-Fit feature calculates the overall score for a target profile using an algorithm rule. The overall score appears in the Overall Fit column in the results section on the Find Best Fit page. The algorithm for the best-fit analysis is automatically processed by the application.

The following image shows the best-fit algorithm rule.



## Selected Profile

The selected profile for which you want to find the profile that is the best-fit is source profile.

## Target Profile

The target profile is the profile for which the overall score is calculated. The application compares the content items of the target profile with those of the source profile.

## Individual Score

The individual score is the number assigned to each matching content item of the content types for which you specify the priority or importance. The individual score calculation algorithm depends on the best-fit analysis type.

## Overall Score Calculation Rule

The overall score is the total of all individual scores of all matching content items. If the total of all individual scores includes decimals, then the application rounds off the total score to derive the overall score. The application rounds down the score if the decimal digit is less than 5. However, it increases the score by 1 if the decimal digit is 5 or more.

Examples:

- If the total score is 56.4, the overall score is 56.
- If the total score is 56.7, the overall score is 57.

## Person to Person, Job to Person, and Job to Job Analyses: How the Individual Score is Calculated

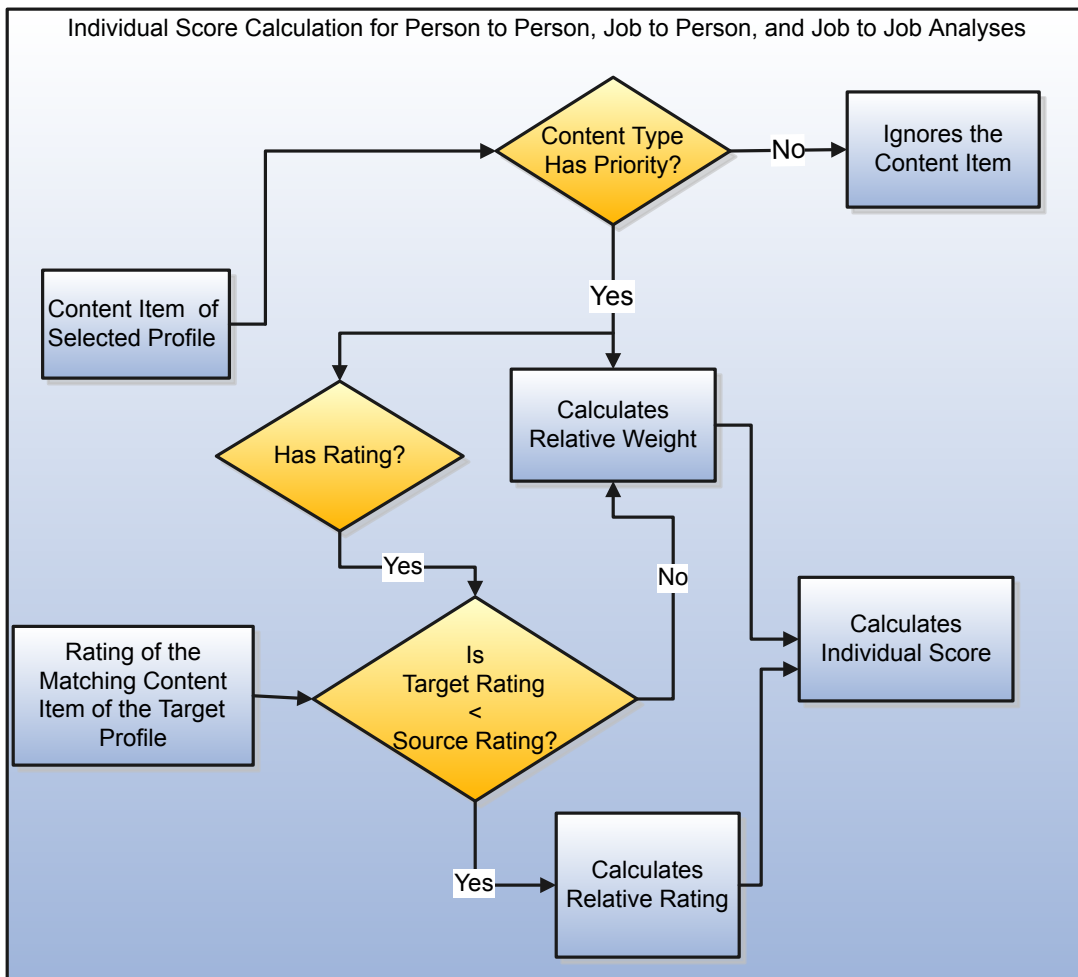
In the following best-fit analyses, each content item of the selected profile must match the target profiles:

- Person to person
- Job to person
- Job to job

The individual score of each content item of the target profile is based on the priority set at the content type or content item level.



The following graphic shows how the individual score is calculated for each content of the selected profile that match with the target profile. The graphic is applicable for only person to person, job to person, and job to job analyses.




## Deciding the Priority

The best-fit algorithm uses the priority assigned to the content type or content item of the selected profile. The priority is used to decide the overall score of the target profile. Depending on the analysis type, you select the priority on the Find Best Fit Person or on the Find Best Fit Job page. You can either select a common priority value for all content items within a content type or specify priority using details.

To specify priority using details:

1. Select the **Priority Using Details** option on the Find Best Fit Person or Find Best Fit Job page.
2. Click the **Details** icon. The Best Fit Criteria page opens.
3. Specify the **Match** option for each content item within a content type. The value you select for the **Match** option is the priority value allocated at the content item level. The application calculates the individual score of each content item by considering the match value as the priority value for the content item.

 **Note:** You can't use the **Priority Using Details** option for the Work Requirements content type. The priority for this content type is always specified at the content type level. The application considers only the Travel Domestically and Travel Internationally work requirements for best-fit calculations. The application calculates the individual score of the Work Requirements content type for a target profile as follows:

- If both travel requirements of the source and target profiles match, then the Individual Score = Relative Weight \* 100.
- If only one travel requirement of the source and target profiles match, then the Individual Score = 0.5 \* Relative Weight \* 100.
- If none of the travel requirements of the source and target profiles match, then work requirements are ignored in best-fit calculations.

The priority of a content type is populated using the HRT\_MATCH\_IMPORTANCE lookup type values. Depending on the **Match** option value, the application calculates the score for each content item within a content type.

The following table illustrates the value of each priority level. These values are application-defined and can't be modified.

Priority Level	Value
None	0
Low	1
Medium	2
High	3
Important	4
Very Important	5
Priority Using Details	Match of content item

## Profile Ratings in Best-Fit Calculations

The overall score of a target profile also includes any ratings entered for the content items of the Competencies and Languages content types.

The Competencies content type uses the Proficiency rating model. The following table illustrates the default rating levels of the Proficiency Rating Model and corresponding value that application assigns to the rating level.

Rating Level	Value
Foundation	1
Intermediate	2
Skilled	3

Rating Level	Value
Advanced	4
Expert	5

The Languages content type uses the Language Rating Model. The following table illustrates the default rating levels of the Language Rating Model and corresponding value that application assigns to the rating level.

Rating Level	Value
Low	1
Moderate	2
High	3

## Relative Weight

The application calculates the relative weight of the content item for which you specify the priority at the content item or content type level. You specify the priority for the content types on the Best-Fit UI. The relative weight is the importance of a content item with respect to all the other content items in the source profile. The relative weight in the person to person, job to person, and job to job analyses is calculated only for the source profile content items. The relative weight is calculated using the following equation:

Relative Weight = Content item priority / Sum of all content items priorities

Example: The source profile content type has six content items for the Competencies content type and one content item for the Degrees content type. The priority is set at content type level. For the Competencies content type, the priority is set to Medium (2) and for the Degrees content type, it's set to Low (1). The relative weight for each content item:


- In the Competencies content type =  $2 / (2 + 2 + 2 + 2 + 2 + 2 + 1) = 2 / 13 = 0.153846$
- In the Degrees content type =  $1 / (2 + 2 + 2 + 2 + 2 + 2 + 1) = 1 / 13 = 0.076923$

## Relative Rating

If the content type with priority also has rating, the application calculates the relative rating of the content item associated with the content type. The relative rating is the rating of the content item in the target profile with respect to the source profile. The relative rating in the person to person, job to person, and job to job analyses is calculated using the following equation:

Relative Rating = Target Rating / Source Rating

Example: The rating level of a content item associated with the source and target profiles is 4 and 2 respectively. In this case, the relative rating for the content item in the target profile =  $2 / 4 = 0.5$ .

 **Note:** The relative rating is considered in the individual score calculation only when the source rating is greater than or equal to the target rating.

## Individual Score of a Content Item

The individual score of a content item is calculated according to the criteria and the corresponding equation discussed in the following table. The table is applicable for person to person, job to person, and job to job analyses only.

Content Type Has Rating?	Criteria	Equation
No	Not applicable	Individual score = Relative Weight * 100
Yes	Target Rating > or = Source Rating	Individual score = Relative Weight * 100
Yes	Target Rating < Source Rating	Individual score = Relative Rating * Relative Weight * 100

In the earlier table:

- Target Rating is the rating level associated with a content item of the target profile
- Source Rating is the rating level associated with a content item of the source profile
- Relative Weight = Content item priority / Sum of all content items priorities
- Relative Rating = Target Rating / Source Rating

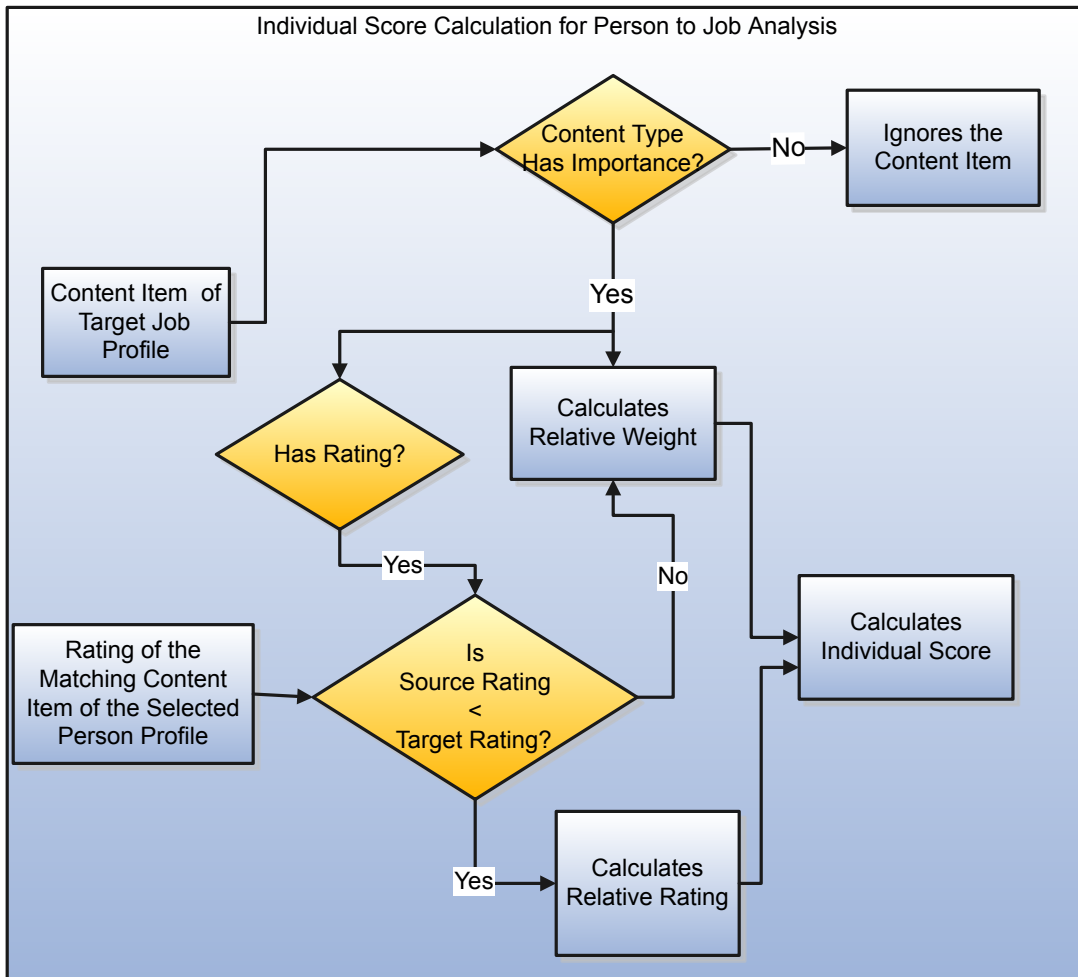
### Related Topics

- [Rating Models: Explained](#)

## Person to Job Analysis: How the Individual Score is Calculated


In the person to job analysis, each content item of the target job profile must match the selected person profile. The individual score of each content item of the target job profile is based on the importance of the content item.

The following graphic shows how the individual score is calculated for each content item of the target job profile. The content item must match with the corresponding content item in the selected person profile. The graphic is applicable only for the person to job analysis.



## Verifying the Importance

When you do a person to job analysis, the best-fit algorithm utilizes the importance of all content associated with a target job to find the best-fit job for the selected person profile. The option to enter the priority for a person profile type is disabled on the UI.

 **Note:** The importance for the Work Requirements content type is always specified at the content type level. The application considers only the work requirement properties Travel Domestically and Travel Internationally for best-fit calculations. The application calculates the individual score of the Work Requirements content type as follows:

- If both travel requirements of the source and target profiles match, then the Individual Score = Relative Weight \* 100.
- If only one travel requirement of the source and target profiles match, then the Individual Score = 0.5 \* Relative Weight \* 100.
- If none of the travel requirements of the source and target profiles match, then work requirements are ignored in best-fit calculations.

The importance of a content type is populated using the HRT\_MATCH\_IMPORTANCE lookup type values.

## Profile Ratings in Best-Fit Calculations

Any ratings entered for the content items of the content type competencies and languages are also used in the calculation of the overall score of a target profile.

The Competencies content type uses the Proficiency rating model. The following table illustrates the default rating levels of the Proficiency Rating Model and corresponding value that application assigns to the rating level.

Rating Level	Value
Foundation	1
Intermediate	2
Skilled	3
Advanced	4
Expert	5

The Languages content type uses the Language Rating Model. The following table illustrates the default rating levels of the Language Rating Model and corresponding value that application assigns to the rating level.

Rating Level	Value
Low	1
Moderate	2
High	3

## Relative Weight

The application calculates the relative weight of the content item for which the importance is specified at the content item or content type level. The relative weight is the importance of a content item of the job profile with respect to all the other content items in the job profile. The relative weight in the person to job analysis is calculated only for the target profile content items using the following equation:

Relative Weight = Content item priority / Sum of importance for all content items

Example: The target job profile has in all three content types Competencies, Degrees, and Languages. The Competencies content type has in all six content items, the Degrees content type has one content item, and the Languages content type has one content item. The target importance already specified for each content item in Competencies and Degrees is Medium (2) and for Languages is Low (1). The relative weight for each content item:


- In the Competencies content type =  $2 / (2 + 2 + 2 + 2 + 2 + 2 + 1) = 2 / 15 = 0.133333$
- In the Degrees content type =  $1 / (2 + 2 + 2 + 2 + 2 + 2 + 1) = 2 / 15 = 0.133333$
- In the Languages content type =  $1 / (2 + 2 + 2 + 2 + 2 + 2 + 1) = 1 / 15 = 0.066667$

## Relative Rating

If the content type for which the importance is specified has a rating, the application calculates the relative rating of the content item associated with the content type. The relative rating is the rating of the content item in the source profile with respect to the target profile. The relative rating in the person to job analysis is calculated using the following equation:

Relative Rating = Source Rating / Target Rating.

Example: The rating level of a content item associated with the source and target profiles is 2 and 4 respectively. In this case, the relative rating for the content item =  $2 / 4 = 0.5$ .

 **Note:** The relative rating is considered in the individual score calculation only when the target rating is greater than or equal to the source rating.

## Individual Score of a Content Item

The individual score of a content item is calculated according to the criteria and the corresponding equation discussed in the following table. The table is applicable for a person to job analysis only.

Content Type Has Rating?	Criteria	Equation
No	Not applicable	Individual score = Relative Weight * 100
Yes	Target Rating < Source Rating	Individual score = Relative Weight * 100
Yes	Target Rating > or = Source Rating	Individual score = Relative Rating * Relative Weight * 100

In the earlier table:

- Target Rating is the rating level associated with the content item of the target job profile
- Source Rating is the rating level associated with the content item of the source person profile
- Relative Weight = Content item priority / Sum of all content items priorities

- Relative Rating = Source Rating / Target Rating

### Related Topics

- [Rating Models: Explained](#)

## Best-Fit Analysis: Examples

Use the best-fit analysis to find the profiles that most closely match a selected profile. You select a person or job profile (job or position) as a source profile and use the Best-Fit feature to find profiles that best match the source profile. The best-fit analysis results are based on how well the content items of a target profile match content items of the source profile.

### Best-Fit Person Profile

As an HR specialist, you want to find the best-fit person profile for John.

John's person profile has the following content:

- Competencies as shown in the following table.

Competencies (Content Item)	Proficiency	Numeric Value of Rating
Action Oriented	Expert	5
Adapt Productively	Advanced	4
Communication	Expert	5

- Degrees:
  - Bachelor of Engineering
  - Master of Business Administration
- Language with details as shown in the following table.

Languages (Content Item)	Reading (Rating Value)	Writing (Rating Value)	Speaking (Rating Value)
English	Moderate (2)	Low (1)	High (3)

- Work Requirements:
  - Travel Domestically: No
  - Travel Internationally: No

You set the priority for the John's profile content on the best-fit person UI as illustrated in the following table and perform the Find Best Fit Person action on John's person profile.

Content	Priority (Numeric Value of the priority)
Competencies	Medium (2)



Content	Priority (Numeric Value of the priority)
Honors and Awards	Medium (2)
Work Requirements	Medium (2)
Languages	Medium (2)
Degrees	Medium (2)
Licenses and Certifications	Medium (2)

In the results section, for an overall fit greater than 50%, the application displays the target person profile Alex.

Alex's person profile has the following content details:

- Competencies as shown in the following table.

Competencies (Content Item)	Proficiency	Numeric Value of Rating
Communication	Advanced	4
Problem Solving	Skilled	3

- Degrees:
  - Bachelor of Engineering
  - Diploma
- Languages as shown in the following table.

Languages (Content Item)	Reading (Rating Value)	Writing (Rating Value)	Speaking (Rating Value)
English	High (3)	Moderate (2)	Low (1)
French	Low (1)	Low (1)	Low (1)

- Work Requirements:
  - Travel Domestically: No
  - Travel Internationally: No

For the best-fit calculation, the application considers the individual score of the following four content items of Alex's person profile that match with the content items of John's person profile:

- Competencies: Communication
- Degrees: Bachelor of Engineering

- Languages: English
- Work Requirements: Travel Domestically and Travel Internationally

The following table illustrates the overall score calculation of Alex's person profile.

Content	Source Priority	Source Rating	Target Rating	Relative Weight	Individual Score
Competencies (Communication)	2	5	4	0.1428571	11.428568
Degrees (Bachelor of Engineering)	2	Not applicable	Not applicable	0.1428571	14.28571
Languages (English)	2	2	3	0.1428571	14.28571
Work Requirements	2	Not applicable	Not applicable	0.1428571	14.28571
				Total Score	54.285698
				Overall Score	54

The overall score is calculated as follows:

- The source profile John has in all seven content items with the priority for all content items set to Medium (2) at the content type level. Therefore, the relative weight for each content item =  $(2 / 14) = 0.1428571$  (where, Relative Weight = Content item priority / Sum of all content item priorities).
- The application calculates the individual score of the matching content using the appropriate equation as displayed in the following table.

Content	Criteria	Relative Rating	Individual Score Equation	Individual Score
Competencies (Communication)	Target Rating < Source Rating	Target Rating / Source Rating = 4 / 5	Individual Score = Relative Rating * Relative Weight * 100	$(4 / 5) * 0.1428571 * 100 = 11.428568$
Degrees (Bachelor of Engineering)	Not applicable	Not applicable	Individual Score = Relative Weight * 100	$0.1428571 * 100 = 14.28571$
Languages (English)	Target Rating > Source Rating	Not applicable	Individual Score = Relative Weight * 100	$0.1428571 * 100 = 14.28571$
Work Requirements	Both travel requirements, Travel Domestically and Travel Internationally, of source and target profiles matches.	Not applicable	Individual Score = Relative Weight * 100	$0.1428571 * 100 = 14.28571$

- The total score is the sum of all individual scores. Therefore, total score = 54.285698.

- The application rounds off the total score to the nearest whole number. Therefore, the overall score of the target profile is displayed as 54.

## Best-Fit Job Profile

As an HR specialist, you want to find the best-fit job profile for the person profile for Beth.

Beth's person profile has the following content:

- Competencies as shown in the following table.


Competency (Content Item)	Proficiency	Numeric Value of Rating
Action Oriented	Intermediate	2
Communication	Intermediate	2
Leading People	Foundation	1
Working Globally	Intermediate	2

- Degrees: Technical Diploma
- Language as shown in the following table.

Language (Content Item)	Reading (Rating Value)	Writing (Rating Value)	Speaking (Rating Value)
English	Low (1)	Moderate (2)	Low (1)

- Memberships: ICAS

You perform the Find Best Job action on Beth's person profile. In the results section, for an overall fit greater than 40%, the application displays the job profile Accountant.

 **Note:** In the person to job best-fit analysis, you can't set the priority on the best-fit job UI. Instead, the application considers the importance of the content items of the target job profile for best-fit calculations.

The target job profile Accountant has the following content types with the importance already specified for each content item or content type:

- Competencies as shown in the following table.

Competency (Content Item)	Proficiency (Numeric Value)	Importance (Numeric Value)
Action Oriented	Intermediate (2)	Medium (2)
Communication	Intermediate (2)	Medium (2)
Leading People	Intermediate (2)	Medium (2)
Working Globally	Intermediate (2)	Medium (2)

Competency (Content Item)	Proficiency (Numeric Value)	Importance (Numeric Value)
Analytical Skills	Intermediate (2)	Medium (2)
Embrace Change	Intermediate (2)	Medium (2)
Manage Risk	Intermediate (2)	Medium (2)
Market and Industry Knowledge	Intermediate (2)	Medium (2)
Resource Management	Intermediate (2)	Medium (2)

- Degrees as shown in the following table.

Content Item	Importance (Numeric Value)
Technical Diploma	Medium (2)

- Languages as shown in the following table.

Language (Content Item)	Reading (Rating Value)	Writing (Rating Value)	Speaking (Rating Value)	Importance
English	Low (1)	Low (1)	Medium (2)	Medium (2)

- Memberships

Content Item	Importance (Numeric Value)
ICAS	Medium (2)
CIMA	Medium (2)
ACCA	Medium (2)

- Work Requirements:

Requirements	Importance (Numeric Value)
Travel Domestically: No	Medium (2)
Travel Internationally: No	Medium (2)

For the best-fit calculation, the application considers the individual score of the following 7 content items of the job profile Accountant that match with the content items of Beth:

- Competencies: Action Oriented, Communication, Leading People, Working Globally
- Degrees: Technical Diploma
- Languages: English
- Memberships: ICAS

The following table illustrates the overall score calculation of the target job profile Accountant.

Content	Target Importance	Source Rating	Target Rating	Relative Weight	Individual Score
Competencies (Action Oriented)	2	2	2	0.066667	6.6667
Competencies (Communication)	2	2	2	0.066667	6.6667
Competencies (Leading People)	2	1	2	0.066667	3.33335
Competencies (Working Globally)	2	2	2	0.066667	6.6667
Degrees (Technical Diploma)	2	Not applicable	Not applicable	0.066667	6.6667
Languages (English)	2	1	2	0.066667	6.6667
Memberships (ICAS)	2	Not applicable	Not applicable	0.066667	6.6667
				Total Score	43.3335
				Overall Score	43

The overall score is calculated as follows:

- The target job profile Accountant has in all 15 content items with the importance (or priority) for all content items at the content type level set to 2. Therefore, the relative weight for each content item =  $2 / 30 = 0.066667$  (where, Relative Weight = Content item importance / Sum of all content item importance).
- The application calculates the individual score of the matching content using the appropriate equation as displayed in the following table.

Content	Criteria	Relative Rating	Individual Score Equation	Individual Score
Competencies (Action Oriented)	Target Rating = Source Rating	Source Rating / Target Rating = $2 / 2$	Individual Score = Relative Rating * Relative Weight * 100	$(2 / 2) * 0.066667 * 100 = 6.6667$

Content	Criteria	Relative Rating	Individual Score Equation	Individual Score
Competencies (Communication)	Target Rating = Source Rating	Source Rating / Target Rating = 2 / 2	Individual Score = Relative Rating * Relative Weight * 100	$(2 / 2) * 0.066667 * 100 = 6.6667$
Competencies (Leading People)	Target Rating > Source Rating	Source Rating / Target Rating = 1 / 2	Individual Score = Relative Rating * Relative Weight * 100	$(1 / 2) * 0.066667 * 100 = 3.33335$
Competencies (Working Globally)	Target Rating = Source Rating	Source Rating / Target Rating = 2 / 2	Individual Score = Relative Rating * Relative Weight * 100	$(2 / 2) * 0.066667 * 100 = 6.6667$
Degrees (Technical Diploma)	Not applicable	Not applicable	Individual Score = Relative Weight * 100	$0.066667 * 100 = 6.6667$
Languages (English)	Not applicable	Not applicable	Individual Score = Relative Weight * 100	$0.066667 * 100 = 6.6667$
Memberships (ICAS)	Not applicable	Not applicable	Individual Score = Relative Weight * 100	$0.066667 * 100 = 6.6667$

- The total score is the sum of all individual scores. Therefore, total score = 43.3335.
- The application rounds off the total score to the nearest whole number. Therefore, the overall score of the target profile is displayed as 43.

#### Related Topics

- [Rating Models: Explained](#)

## FAQs for Compare Profiles and Find the Best Fit

### How are the differences between comparison attributes identified?

The differences are calculated between the attributes of the secondary items and the base item. Differences between numeric values are calculated and displayed; character differences are indicated using an icon..

When the data includes a range (competency ratings, for example), the comparison displays the differences from each end of the range. The comparison, however, doesn't display the differences for values that lie within the range. For example, consider that you are comparing the competency requirements of two job profiles. The competency requirement of the base job is between 2 and 4 and the secondary job is between 1 and 3. The comparison displays the difference between the minimum competency requirement of the secondary job (1) and the base job (2) as -1. The comparison doesn't display the difference between the maximum values because the maximum competency requirement of the secondary job (3) lies within the competency requirement of the base job (between 2 and 4).

## How is risk of loss assessed?

Line managers and human resource specialists enter the risk of loss information in a person's profile manually; there is no automated risk assessment process. They evaluate the risk of workers changing jobs or leaving the enterprise and select the ratings .

## Can I add additional data sets to the comparison?

No, you can only select from the list of data sets available for an item type.

## What happens if I remove the comparison base?

The next item in the comparison is automatically designated as the comparison base and the differences from the new base item are indicated. Note that the comparison must always include a base item.

## What's the difference between performing a best-fit analysis and comparing profiles?

Perform a best-fit analysis to find matching profiles for a specified profile using a wide variety of criteria. For example, use best-fit analysis to find the top five person profiles matching a job profile, based on competency requirements, language skills, and certifications.

Compare profiles to evaluate the similarities and differences between known profiles and identify the most suitable profiles. For example, compare the five person profiles identified by the best-fit analysis and identify the person most suited to the job.

To compare or perform a best-fit analysis, use the Compare action in the smart navigation.

# Creating and Updating Profiles

## Model Profiles: Explained

Model profiles identify the competencies, qualifications, skills, and experience required for a workforce structure, such as a job or position. Use the Manage Model Profiles task in the Profiles work area to create a model profile.

You must use the job profile type to create model profiles. Jobs and positions are workforce structures optionally included in a profile. A job or position profile can exist as an abstract profile that just groups requirements and doesn't reference an existing or planned job or position.

 **Note:** You must use the Job profile type to create model profiles.

## Workforce Structure

You can optionally associate the model profile with a workforce structure. The available workforce structures depend on how the profile type is defined. The workforce structures are limited to jobs, positions, organizations, and job families. However, to create a model profile you must use the Job profile type as the template.


You can associate:

- A model profile with more than one workforce structure. Associating model profiles with jobs and positions enables you to define for the job or position the competencies, educational qualifications, and other skills that are required.
- Multiple model profiles with a workforce structure. However, only one profile can be in effect at a time for the workforce structure. Therefore, the effective start and end dates of multiple profiles associated with a workforce structure must not overlap.

When you associate jobs and positions with a model profile, you can compare profiles and use the best-fit analysis for tasks such as finding the worker best-suited for a job or for helping workers identify their next career moves.

## Requirements

Identify requirements for the model profile by selecting from the content types. For example, the job profile type might contain these content types: competencies, degrees, honors and awards, languages, licenses and certifications, memberships, and work requirements. If you create a model profile, you can define the requirements for the job using content items in those content types. To add other content types, you must first add them to the job profile type.

 **Note:** A free-form content type contains only a code, name, and a description, and doesn't have any properties until you add it to a profile type. Free-form content types don't include any content items.

## Performance Document Information

You can configure a performance template section to populate competencies defined for a model profile in the performance document.

### *Related Topics*

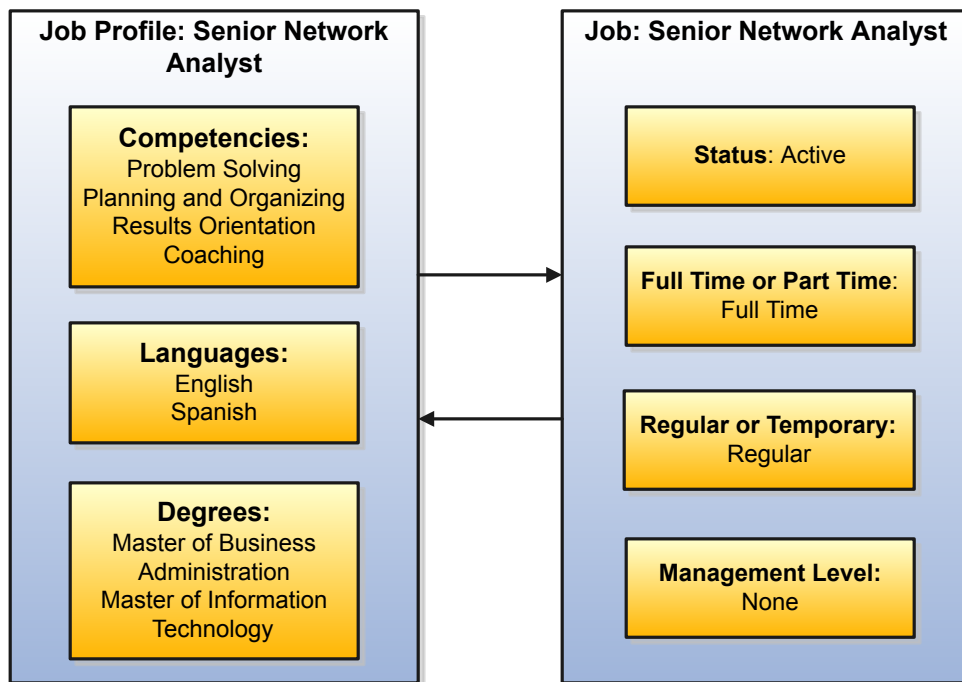
- [Profile Types: Explained](#)
- [Performance Template Section: Critical Choices](#)

## Jobs and Positions: How They Work with Model Profiles

You can associate a model profile with a job or a position. This association enables you to define the work requirements and the required competencies, degrees, and other skills for the job or position. This association also enables you to compare profiles and use the best-fit analysis for tasks such as finding the worker best-suited for a job or for helping workers identify their next career moves.



This figure illustrates the information that is contained in a model profile versus that contained in a job.



## Associating a Model Profile with a Job or Position

You must use the Job profile type to create model profiles and associate them with a job or position. You can have only one association with a model profile active at one time.

## Editing a Profile

You can associate a model profile with multiple jobs and positions. Use the Manage Model Profiles task in the Profiles work area to:

- Create or edit model profiles by using the Job profile type
- Associate model profiles with jobs and positions
- Remove associations between a model profile and jobs or positions

### Related Topics

- [Jobs and Positions: Critical Choices](#)
- [Profile Types: Explained](#)

## Creating Job Profiles: Procedure

You can associate a job profile with a job to define the work requirements and the required competencies, degrees, and other skills for the job. Using this association, you can compare job profiles and use the best-fit analysis to:

- Find the worker best-suited for a job.

- Help workers identify their next career moves.

You must use the Job profile type to create profiles for jobs. To create a job profile:

1. Sign in as an HR specialist.
2. Select **Navigator - My Workforce - Profiles**. The Search Profiles page opens.
3. On the Tasks tab in the right panel, click **Manage Model Profiles** to open the Manage Model Profiles page.
4. On the **Search Results** section toolbar, click **Create** to open the **Create Model Profile** dialog box.
5. From the **Profile Type** list, select **Job**.
6. Enter values for the fields shown in the following table.

Fields	Description
<b>Code</b>	Enter a unique code for the profile.
<b>Name</b>	Enter a unique name for the profile.
<b>Description</b>	Enter a description for the profile.

7. Click **OK** to open the Job Profile page.
8. Expand **Workforce Structures**.
9. On the **Workforce Structures** section toolbar, click **Add**.
10. From the **Workforce Structure** list, select **Job**.
11. From the **Name** list, search for and select the job with which you want to associate the profile.
12. In the **Effective Start Date** field, enter the date from which you want to associate the profile with the job. At a time, you can associate only one active profile with a job. If multiple profiles exists for a job, ensure that their dates in the **Effective Start Date** and **Effective End Date** fields don't overlap.
13. Optional: In the **Effective End Date** field, enter the date until when you want to associate the profile with the job.
14. In the **Requirements** section, add required content types.
15. Click **Submit**. An active job profile for the selected job was created using the Job profile type.

#### Related Topics

- [Profile Types: Explained](#)
- [Content Types: Explained](#)
- [Content Section Properties: Explained](#)

## Creating Position Profiles: Procedure

You can associate a position profile with position to define the work requirements and the required competencies, degrees, and other skills for the position. Using this association, you can compare position profiles and use the best-fit analysis to:

- Find the worker best-suited for a position.
- Help workers identify their next career moves.

You must use the Job profile type to create profiles for positions. To create a position profile:

1. Sign in the application as an HR specialist.
2. Select **Navigator - My Workforce - Profiles**. The Search Profiles page opens.

3. On the Tasks tab in the right panel, click **Manage Model Profiles** to open the Manage Model Profiles page.
4. On the **Search Results** section toolbar, click **Create** to open the **Create Model Profile** dialog box.
5. From the **Profile Type** list, select **Job**.
6. Enter values for the fields shown in the following table.

Fields	Description
<b>Code</b>	Enter a unique code for the profile.
<b>Name</b>	Enter a unique name for the profile.
<b>Description</b>	Enter a description for the profile.

7. Click **OK** to open the Job Profile page.
8. Expand **Workforce Structures**.
9. On the **Workforce Structures** section toolbar, click **Add**.
10. From the **Workforce Structure** list, select **Position**.
11. From the **Name** list, search for and select the position with which you want to associate the profile.
12. In the **Effective Start Date** field, enter the date from which you want to associate the profile with the position. At a time, you can associate only one active profile with a position. If multiple profiles exists for a position, ensure that their dates in the **Effective Start Date** and **Effective End Date** fields don't overlap.
13. Optional: In the **Effective End Date** field, enter the date until when you want to associate the profile with the position.
14. In the **Requirements** section, add required content types.
15. Click **Submit**. An active model profile for the selected position was created using the Job profile type.

#### Related Topics

- [Profile Types: Explained](#)
- [Content Types: Explained](#)
- [Content Section Properties: Explained](#)

## Identifying Job and Position Risk: Explained


Use the Job or Position Risk content section within a model profile to identify the level of risk if the job or position is left vacant. This content section is available on the job and position model profile types. Use the Manage Profile Types task in the Profiles work area to manage job and position profile types.

### Risk Level and Reason

You can enter a level of risk and the reasons for the level of risk, such as skills gaps, future business leadership, market volatility, and organization hierarchy. You can select up to five reasons for risk.

### Succession Planning

The Job or Position Risk content section also includes an option to indicate whether the job or position must be included in a succession plan.

 **Note:** The Requires Succession Plan option is for informational purposes only.

## Creating Person Profiles: Explained

The person profile is a profile type you create for individual workers. Person profile data, such as the skills, qualifications, accomplishments, and career preferences of a person, is displayed on Skills and Qualifications and Career Planning pages on a worker's person profile. HR specialists or implementors can create person profiles from the application, or implementors can upload them using tools such as HCM Data Loader.

The application provides the functionality to automatically create person profiles for person records. You can enable or disable this functionality using the **Autocreate Person Profiles** check box. By default, this check box is already selected. The **Autocreate Person Profiles** check box is available on the Edit Profile Type page of the person profile type. Use the Manage Profile Types task in the Profiles or Setup and Maintenance work area to edit the person profile type.

When the **Autocreate Person Profiles** check box is selected:

- The application automatically creates the person profile for that person when someone accesses the Skills and Qualifications page for a person.
- The person profile added for a pending worker is activated on the effective hire date for an employee or the effective placement date for a contingent worker.

If you choose to deselect the **Autocreate Person Profiles** check box for the person profile type and no profile exists for a person, the application displays an error message to create or upload profile when you access that person's Skills and Qualifications page. However, when uploading talent profile data from external sources, you must deselect the **Autocreate Person Profiles** check box to avoid duplication of person profiles.

### Related Topics


- [Person Records: Explained](#)

## Adding Content to a Worker's Profile: Procedure

Depending on the content section access settings for HR specialists and managers, they can edit content or add it to a worker's profile. To view, add, or edit content of a worker's profile, they must use the worker's Skills and Qualifications page.

As an HR specialist, follow these steps to either edit the content or add it to the worker's profile:

1. Click **My Workforce - Profiles** to open the Search: Profiles page.
2. Click the name of the worker in the Results section to open the Skills and Qualifications page of that worker.

 **Tip:** Alternatively, use the Manage Talent Profile task in the Person Management work area to open a person's Skills and Qualifications page.

3. Click **Edit** on the Skills and Qualifications page to either edit the content, or add it to the worker's profile.

As a manager, follow these steps to either edit the content or add it to a report's profile:

1. Click **My Team - Team Talent**.
2. Click a report's person card to open the Skills and Qualifications page for the report.
3. Click **Edit** on the Skills and Qualifications page to either edit the content, or add it to the report's profile.

## Related Topics


- [Content Section Access: Explained](#)

# Uploading Talent Profile Data: Explained

Talent profile data is the person and job profiles data displayed on Skills and Qualifications and Career Planning pages. You access these pages for a worker in the worker's person spotlight. Examples of talent profile data include ratings and corresponding rating models, content items, and educational establishments. You can upload talent profile data for initial migration or mass data entry.

The following tools support upload of talent profile data:

- Oracle ADF Desktop Integration (ADFdi) workbook
- Oracle Fusion HCM Data Loader
- Oracle Fusion HCM Spreadsheet Data Loader

 **Note:** The tools available to you for uploading talent profile data depend on the setting of the HCM Data Loader Scope parameter. The ADFdi workbook isn't affected by the HCM Data Loader Scope parameter. You can continue to upload competencies using the ADFdi workbook regardless of the parameter setting.

For more information about:

- Uploading content items using an ADFdi workbook, see [Uploading Competencies and Content Items into Oracle Fusion Profile Management \(1453118.1\)](#) on My Oracle Support at <https://support.oracle.com>.
- All data loaders mentioned earlier, see [Oracle Human Capital Management Cloud Integrating with Oracle HCM Cloud Guide](#).

## Uploading Actions

The following table displays the type of talent profile data you typically upload and the actions you perform to load that data.

 **Note:** Use the **Open Competency Excel Template** option to generate the ADFdi workbook for uploading competencies. The option is available on the Manage Content Items page in the Profiles work area.

Uploading Tool	Talent Profile Data Type	Actions
ADFdi workbook	<ul style="list-style-type: none"> <li>• Content item (only Competency)</li> </ul>	<ul style="list-style-type: none"> <li>• Create</li> <li>• Update</li> </ul>
HCM Data Loader	<ul style="list-style-type: none"> <li>• Educational establishment</li> <li>• Talent profile rating model</li> <li>• Talent profile type (only Person and Job)</li> <li>• Talent profile content item</li> <li>• Talent profile content item relationship</li> </ul>	<ul style="list-style-type: none"> <li>• Create</li> <li>• Update</li> <li>• Delete</li> </ul>
HCM Spreadsheet Data Loader	<ul style="list-style-type: none"> <li>• Educational establishment</li> <li>• Talent profile rating model</li> <li>• Talent profile type (only Person and Job)</li> </ul>	<ul style="list-style-type: none"> <li>• Create</li> <li>• Update</li> </ul>

Uploading Tool	Talent Profile Data Type	Actions
	<ul style="list-style-type: none"> <li>Talent profile content item</li> <li>Talent profile content item relationship</li> </ul>	

### Related Topics

- Using Desktop Integrated Excel Workbooks: Points to Consider

## Updating Talent Ratings: Explained

Talent ratings are ratings that are used to evaluate a worker, including performance, potential, proficiency, readiness, and impact. Ratings are used in multiple products within the HCM product family such as Oracle Fusion Profile Management, Oracle Fusion Performance Management, and Oracle Fusion Talent Review.

### Talent Rating Types

The following table displays the talent ratings and their descriptions. Depending on application settings and roles assigned, you can view, add, and update these talent ratings across multiple products within the HCM product family.

Talent Ratings	Description
Talent score	Evaluate a person's overall value to the organization using a rating model your organization defines.
Performance rating	Evaluate an item, section, or overall performance document.
Potential level	Evaluate a person based on the execution of the person's work.
Potential score	Evaluate a person's attainable level of excellence or ability to achieve success.
N box cell assignment	Evaluate a person's current contribution and potential contribution to the organization on a box chart matrix with N boxes. N represents the number of boxes in the grid.
Advancement readiness	Evaluate a person's readiness for the next position in their career development.
Risk of loss	Evaluate the likelihood of a person leaving the company.
Impact of loss	Evaluate the real or perceived effects on an organization when the person leaves.
Proficiency	Evaluate a person's skill level for a competency.
Behavior ratings	Evaluate a person's actions for a behavior associated with a competency.

### Updating Talent Ratings

You can update talent ratings depending on application settings and roles assigned to you. The following table shows where talent ratings can be updated.

Talent Ratings	Can Be Updated in Portrait?	Can Be Updated in Talent Review?	Can Be Updated in Performance Management?	Can Be Updated in Succession Management?
Talent score	Yes	Yes	No	No
Performance rating	Yes	Yes	Yes	No
Potential level	Yes	Yes	No	No
Potential score	Yes	Yes	No	No
N box cell assignment	No	Yes	No	No
Advancement readiness	Yes	No	No	No
Risk of loss	Yes	Yes	No	Yes
Impact of loss	Yes	Yes	No	Yes
Proficiency	Yes	No	Yes	No
Behavior ratings	Yes	No	No	No

When you update talent ratings:

- The performance rating on a performance document is always the one entered by the manager during a worker's performance evaluation. The performance rating from the worker's performance document is then displayed on the worker's profile when configured to do so in the performance template.
- In Oracle Fusion Compensation Management, if configured, you can also update the performance, goals section, and competencies section ratings, which appear in performance documents.
- The talent review process uses talent ratings on the worker's profile to build talent review information. When a talent review meeting concludes, a worker's profile is automatically updated with the calibrated ratings. Therefore, the performance rating displayed in a worker's performance document might be different from the one displayed in the worker's profile.

#### Related Topics

- [Performance Ratings: Points to Consider](#)
- [Rating Models: Explained](#)

## FAQs for Creating and Updating Profiles

## What happens if I change the status of a model profile to inactive?

If you change the status of a model profile associated with a job or position to inactive, the model profile is no longer available. The profile is visible only to an administrator. The profile isn't available when you perform a best-fit analysis or a comparison of profiles, or when you search for model profiles. Any workforce structures that were associated with the inactive model profile are made available to associate with another active model profile.

The profile is also removed from workers' interest lists. A notification is sent to HR specialists and managers, and to those workers who have the profile in their interest list.

### *Related Topics*

- [Profile Types: Explained](#)
- [Content Types: Explained](#)
- [Content Section Properties: Explained](#)

## What's a competency gap chart?

A competency gap chart is a graphical representation of how well your competency ratings match the required proficiency ratings of a job or position profile. The job or position profiles to which you can compare your profile include your assignments and the profiles in your interest list. The application generates competency gap chart using only those competencies that appear in both your profile and the selected job or position profile. Select **Navigator - About Me - Talent Profile** to view the competency gap chart on the Skills and Qualifications page. You can also view the competency gap chart for each explored role or roles added as careers of interest in the Career Development work area.

Use the competency gap chart in your career development to determine whether you're already qualified for the selected job or position, or if areas exist where you need further development. If you identify gaps, you or your manager can also add a goal for the competency for which you have lesser ratings in the Career Development work area. For example, if your rating for the Leadership competency is 3 and the targeted rating for that competency in the Product Manager job is 4, you might research training classes or ask for projects that would help you improve your leadership capabilities. In the Career Development work area, you can also add a goal to the Leadership competency to help you improve your leadership capabilities.

If the job or position profile contains fewer than three competencies, then the competency gap chart is displayed as a bar chart. Otherwise, the chart is displayed as a radar chart. The compatible percentage for a role is automatically calculated using the best-fit analysis tool.

### *Related Topics*

- [Career Development: Explained](#)

## What's a career statement?

A career statement is a summary of your career goals. You can enter your career statement on your Career Planning page or on the My Career Development page. Anyone who can view your career planning information can view your career statement. To open your Career Planning page, select **Navigator - About Me - Talent Profile**, and then click the Career Planning tab. Use the Career Development work area to view the My Career Development page.



Career statements are for informational purposes only.

## Why did the potential level change when I changed the potential score?

The relationship between the potential score and potential level is defined in the potential rating model. When you change the potential level, the application updates the potential score with the numeric rating for that level. When you change the potential score, the application updates the potential level with the level in the rating model that has a numeric rating closest to the potential score. To change a talent rating of your direct report, click the Edit icon in the Talent Ratings section on the Career Planning page of the selected report's person spotlight. To access a direct report's person spotlight:

- Select **Directory - Directory**, search for the worker, and click the worker's name in the search results
- Select **My Team - My Team** and click the worker's name on the My Team page
- Select **My Team - Team Talent** and click the worker's name on the Team Talent page
- Select **My Team - Team Compensation** and click the worker's name on the Team Compensation page

For example, assume the first two rating levels in the potential rating model contain numeric ratings 1.5 and 2, respectively. If you assign a potential score of 1.7 to a worker, then the potential level for the worker is updated with the first potential level in the rating model, because 1.7 is closer to the numeric rating of 1.5 than it's to the numeric rating of 2.

## What happens if I update the talent ratings on the career planning page?

The talent review process uses these ratings on a worker's profile to build talent review information: talent score, performance rating, potential level, risk of loss, and impact of loss.

If you're preparing for a talent review meeting and you update talent ratings, then the changes are reflected on the Prepare Content Review page. When the talent review meeting concludes, the application automatically updates workers' Career Planning page with the final ratings for talent score, performance rating, potential level, risk of loss, and impact of loss. With the exception of the risk and impact of loss, all ratings from the talent review meeting are assigned a unique instance qualifier. The instance qualifier identifies them as those that resulted from the talent review meeting. If you then update these ratings on the Career Planning page, the talent review ratings remain in the database, but you can see your updates on the Career Planning page instead of the talent review ratings. You open the Career Planning page of a worker in the worker's person spotlight.

Updating the career potential information also affects the performance-potential analytic in the performance management business process.

## How can I prevent my manager from viewing job or position profiles in my interest list?

On your Career Planning page, click **Edit**, and select the **Private** check box for the job or position profile. To open your Career Planning page:.

1. Select **Navigator - About Me - Talent Profile**.
2. Click the Career planning tab.

Only you can view job and position profiles that are set to private. Anyone who can view your career planning card, can view only those job and position profiles that aren't set to private.

## What's the difference between the suggestions list and the interest list?

The suggestions list is automatically generated for you each time you view your Career Planning page. To open your Career Planning page, select **Navigators - About Me - Talent Profile**, and then click the Career Planning tab. This list contains profiles of jobs or positions that are suitable for you. The suggested profiles are based on an analysis of how well your competencies, skills, and qualifications match those of the job or position profile.

You create the interest list by browsing profiles of jobs and positions and adding those that you might like to pursue. Your manager can also add job or position profiles to your interest list as suggestions for the next step in your career. You and your manager can also move profiles of jobs and positions from the suggestions list to the interest list.

## Can I edit skills and qualification data of a person's profile?

Yes. Depending on the content section access settings for your role, you can view and edit any of the predefined or custom content of a worker's profile.

### *Related Topics*

- [Content Section Access: Explained](#)

## How can I add content to my profile?

On the Home page, select **About Me - Talent Profile** to open the Skills and Qualifications page. Click **Edit** on the Skills and Qualifications page to edit or add the content to your profile. Depending on the content section access settings for your role, you can view and edit any of the predefined or custom content on your profile.

### *Related Topics*

- [Content Section Access: Explained](#)

## How can I hide an attribute on the person profile?

You must have the HR specialist role to hide an attribute on the person profile.

To hide an attribute on the person profile:

1. Click **Manage Profile Types** on the Tasks tab in the Profiles work area.
2. Search for the Person profile type and select the row for the profile type in the Search Results section.
3. Click **Edit** in the Search Results section to open the Edit Profile Type page.
4. On the Content Sections tab, select the content section that includes the attribute you want to hide.
5. In the Content Sections region, click the selected content section link to open the Content Section page.
6. In the Content Properties section, select **None** as the **Display** value for the attribute you want to hide.

## How can I delete an attribute from the person profile?

You must have the HR specialist role to delete an attribute from the person profile.

 **Note:** You can hide predefined attributes, but you cannot delete them.


To delete an attribute that is not a predefined attribute from the person profile:

1. Click **Manage Profile Types** on the Tasks tab in the Profiles work area.
2. Search for the Person profile type and select the row for the profile type in the Search Results section.
3. Click **Edit** in the Search Results section to open the Edit Profile Type page.
4. On the Content Sections tab, select the content section that includes the attribute you want to delete.
5. In the Content Sections region, click the selected content section link to open the Content Section page.
6. In the Content Properties section, select the row for the attribute and click **Delete**.

## Customizing Talent Profiles


### Customizing the Skills and Qualifications Page to View Talent Ratings: Procedure

By default, line managers can view or edit talent ratings for a report on the report's Career Planning page. However, by using Oracle Page Composer, you can customize the Skills and Qualifications page of reports to display talent ratings on the Skills and Qualifications page and hide talent ratings on the Career Planning page. To customize a page, you must have the privilege to customize pages. After customization, depending on their accessibility to a talent rating type, line managers can view or edit the talent rating type on a direct report's Skills and Qualifications page. You manage the content section access settings of a talent rating type for a user role using the Manage Profile Types task. The task is available in the Setup and Maintenance, Profiles, or Person Management work area.

 **Note:** You must use an active sandbox to customize the Skills and Qualifications page using Page Composer.

To display talent ratings on a direct report's Skills and Qualifications page:

1. Sign in as a user who has the privilege to customize the Team Talent page.
2. Select **Navigator - My Team - Team Talent**.
3. To open the Skills and Qualifications page of a direct report, click the direct report
4. Click the user name and from the Settings and Actions menu, select **Customize Work Area Pages**.
5. On the **Customize Pages** dialog box, select the **Edit** option for the Site layer and click **OK**.
6. Select **View - Source** at the top-left section of the page to open the Source edit mode.

 **Tip:** By default, the Source window is collapsed in the bottom position. To change the Source window position to the left, select **View - Source Position - Left**. To see the source content, you may need to drag the page splitter.

7. Click the **Skills and Qualifications** icon on the Skills and Qualifications page. The source tree moves to the corresponding region component.

- Under the **panelGroupLayout: vertical** component for the **showDetailItem: Skills and Qualifications** node, select the disabled region component for the location: **/oracle/apps/hcm/profiles/core/publicUi/fuse/page/SkillsTalentRating.jsff** and click **Edit**.

 **Note:** The location is displayed when you hover over a region component.

- In the **Component Properties: region** dialog box, select the Display Options tab.
- Select the **Visible** check box.
- Click **OK** to close the dialog box. The Talent Ratings section appears on the Skills and Qualifications page.
- Click **Close** to close Page Composer.
- Publish your sandbox to make the customization available to users who are line managers.

To adjust the position of sections as they appear on the page, use Page Composer.

#### Related Topics

- [Content Section Access: Explained](#)
- [Setting Up Sandboxes: Procedure](#)

## Customizing the Grid View of the Team Talent Page to Display Talent Score and N Box Cell Assignment Ratings: Procedure

By default, line managers can't view or edit talent score and n box cell assignment ratings for a report on the Team Talent page in the grid view. However, by using Oracle Page Composer, you can customize the Team Talent page to display both the ratings in the grid view of the page. To customize a page, you must have the privilege to customize pages. After customization, depending on their accessibility to a talent rating type, line managers can view or edit the talent rating in the grid view of the Team Talent page. You can display only two ratings on a person card in the grid view of the Team Talent page. Therefore, to display talent score and n box cell assignment ratings, you must customize the existing ratings displayed in the grid view. You manage the content section access settings of a talent rating for a role using the Manage Profile Types task. The task is available in the Setup and Maintenance, Profiles, or Person Management work area.

### Prerequisites

Activate a sandbox.

### Customizing the Grid View


In the following procedure, the Performance rating is replaced with N Box Cell Assignment and the Potential rating with Talent Score.

To enable a line manager to view n box cell assignment and talent score ratings in the grid view of the Team Talent page:


- Sign in as a user who has the privilege to access the Team Talent page.
- Select **Navigator - My Team - Team Talent**. The Team Talent page appears in the grid view.

 **Tip:** If the grid view isn't selected, click the **View Grid** icon.

- Click your user name in the global area and from the Settings and Actions menu, select **Customize Pages**.

 **Note:** If the **Confirm Task Flow Edit** dialog box appears anytime during this procedure, click **Edit** to continue.

4. On the **Customize Pages** dialog box, select the **Edit** option for the Site layer and click **OK**.
5. Select **View - Source** at the top-left section of the page to open the Source edit mode.

 **Tip:** By default, the Dock pane is collapsed in the bottom position. To see the source content, you can drag the page splitter to the top.

6. Replace existing labels on the person card of the Team Talent page with N Box Cell Assignment and Talent Score:
  - a. Click **Performance** on a person card on the Team Talent page. The source tree moves to the Performance component.
  - b. Right-click the component and select **Edit**. The **Component Properties** dialog box appears.
  - c. In the **Value** field, click the drop-down button and select **Select Text Resource**. The **Select Text Resource** dialog box appears.
  - d. In the **Key** field enter a unique value. For example, NB1. You use this value to reuse the label in other pages.
  - e. In the **Display Value** field, enter the label for the n box cell assignment rating. For example, N Box Cell Assignment.
  - f. Click **OK**.
  - g. Click **Apply** and then **OK** to close the **Component Properties** dialog box.
  - h. Repeat steps 6.1 through 6.8 to change the label Potential as Talent Score on the person card on the Team Talent page. For Talent Score, you can enter values for the **Key** and **Display Value** fields as shown in the following table.

Field	Example
<b>Key</b>	TS1
<b>Display Value</b>	Talent Score

7. Use the expression language (EL) to display the value of the n box cell assignment and talent score ratings below the edited labels:
  - a. In the source tree, select the **outputText** node below the **outputText: N Box Cell Assignment** node.
  - b. Right-click the component and select **Edit**. The **Component Properties** dialog box appears.
  - c. In the **Value** field, click the **Edit** icon and select **Expression Builder**. The **Edit** dialog box appears.
  - d. In the **Type a value or expression** field, enter the **{row.NBoxAssignment}** expression.
  - e. Click **OK**.
  - f. Click **Apply** and then **OK** to close the **Component Properties** dialog box.
  - g. In the source tree, select the **outputText** node below the **outputText: Talent Score** node.
  - h. Repeat steps 7.2 through 7.6 to enter the **{row.TalentScore}** expression for the talent score rating.
8. Click **Close** to close Page Composer.
9. Publish your sandbox to make the customization available to users who are line managers.

#### Related Topics

- [Content Section Access: Explained](#)

- [Setting Up Sandboxes: Procedure](#)

## Customizing the List View of the Team Talent Page to Display Talent Score and N Box Cell Assignment Ratings: Procedure

By default, line managers can't view or edit a report's talent score and n box cell assignment ratings on the Team Talent page in the list view. However, by using Oracle Page Composer, you can customize the Team Talent page to display both the ratings in the list view of the page. After customization, depending on their accessibility to a talent rating type, line managers can view or edit the talent rating in the list view of the Team Talent page. You manage the content section access settings of a talent rating for a user role using the Manage Profile Types task. The task is available in the Setup and Maintenance, Profiles, or Person Management work area.


### Prerequisites

Activate a sandbox.


### Customizing List View

To enable line managers to view n box cell assignment and talent score ratings in the list view of the Team Talent page:

1. Sign in as a user who has the privilege to access the Team Talent page.
2. Select **Navigator - My Team - Team Talent**. The Team Talent page appears in the grid view.
3. Click the **View List** icon.
4. Click your user name in the global area and from the Settings and Actions menu, select **Customize Pages**.

 **Note:** If the **Confirm Task Flow Edit** dialog box appears anytime during this procedure, click **Edit** to continue.

5. On the **Customize Pages** dialog box, select the **Edit** option for the Site layer and click **OK**.
6. Select **View - Source** at the top-left section of the page to open the Source edit mode.

 **Tip:** By default, the Dock pane is collapsed in the bottom position. To see the source content, you can drag the page splitter to the top.

7. On the Team Talent page, click **Potential** or any other talent rating. The source tree moves to the corresponding rating component.
8. Under the **panelGroupLayout: vertical** component for the **panelStretchLayout** node, select the disabled node **panelLabelAndMessage:N Box Cell Assignment** and right-click.
9. Select **Edit**. The **Component Properties: N Box Cell Assignment** dialog box appears.
10. On the Display Options tab, select the **Visible** check box and click **Apply**.
11. Click **OK** to close the dialog box.
12. Under the **panelGroupLayout: vertical** component for the **panelStretchLayout** node, select the disabled node **panelLabelAndMessage:Talent Score**.
13. Click **Edit**. The **Component Properties: Talent Score** dialog box appears.
14. On the Display Options tab, select the **Visible** check box and click **Apply**.
15. Click **OK** to close the dialog box.
16. Click **Close** to close Page Composer.
17. Publish your sandbox to make the customization available to users who are line managers.

*Related Topics*

- [Content Section Access: Explained](#)
- [Setting Up Sandboxes: Procedure](#)





# 3 Manager Analytic Tasks

## Analyze Workforce Development Performance: Overview

In the Analyze Workforce Development activity, managers review completed performance documents and analyze the ratings of workers.

They can:

- Review performance ratings for direct and indirect reports, or others whose performance documents they manage.
- Compare the potential of workers to their peers to determine those with the highest value.
- Monitor the progress of performance documents and tasks to maintain schedules and address any problem points.
- Identify individuals who are missing performance documents.

To analyze workforce development performance, managers use the My Organization page, which they can access from the Performance Management work area.

## Eligibility Profiles and Performance Analytics: Explained

Worker eligibility for performance documents determines the values that appear in Performance Management analytics. This topic describes how eligibility profiles are accounted for in the analytics. The analytics appear in the Performance Management work area.

### Active Performance Documents

The table shows how eligibility profiles affect the analytics for active performance documents.

Analytic	Effect of Eligibility Profile
Rating Distribution	Calculates values only for workers who are eligible for the selected performance document.
Task Completion Status	
Performance and Potential	Displays only the ratings for workers who are eligible for the selected performance document, and who have both performance and potential ratings.
My Organization Performance Summary	Displays all managers and workers who are direct and indirect reports of the person accessing the tables; an icon appears next to the names of managers who have no direct reports who are eligible for the selected performance document.

### Past Performance Documents

When you select a past performance document, the calculated analytics display values and names only for those eligible workers who are in the current assignment hierarchy of the manager.

### *Related Topics*

- [Using Eligibility Profiles with Performance Documents: Explained](#)

## FAQs for Manager Analytic Tasks

### Why can't I see some workers in the Performance and Potential box chart?

The box chart displays only workers for whom both overall ratings from the completed performance document and potential data from the worker profile are available. The box chart appears on the My Organization page in the Performance Management work area.

### Why can't I see values for all my direct and indirect reports in the rating distribution?

You can see values only for workers whose managers have provided overall ratings in the performance document and the manager evaluation task is complete. The rating distribution analytic appears on the My Organization page in the Performance Management work area.

### Why do only the overall ratings, and no target ratings, appear in the rating distribution?

When you don't set up a rating distribution for performance documents, only overall ratings, and no target ratings, appear in the rating distribution analytic. You set up the rating distribution using the Manage Target Ratings Distribution task in the Performance Management or Setup and Maintenance work areas.

## 4 Administration Tasks

### Processing Performance Document Eligibility for a Single Worker: Points to Consider

You can process eligibility for a selected worker to determine which performance documents the worker is eligible to use. Typically, you use this process for a single worker who has joined the organization or had a change in eligibility after the eligibility batch process was run. When processing worker eligibility for a selected worker, you must decide whether to:

- Process multiple documents for the worker
- Process a single document for the worker
- Change eligibility for the worker

You process eligibility for a single worker using the Determine Worker Eligibility for Performance Documents task in the Performance Management work area.

### Processing Multiple Documents for a Worker

Process eligibility for a selected worker to determine all documents which are available for the worker within a specific date range.

#### Example

A worker is hired or transfers into the department after an eligibility batch process was run, so the worker is ineligible for any performance documents. To process eligibility for the worker, navigate to the Determine Worker Eligibility for Performance Documents page and search for the worker name. In the Search Results section, select the worker name, and on the Manage Performance Document Eligibility page that appears, use the **Process Eligibility** action to process multiple documents eligibility. Select a date range for which to process documents. When processing is completed, the worker and the worker's manager can access all documents for which the worker is eligible within the selected date range.

### Processing A Single Document for a Worker

Select a single document to make the worker eligible for the document. Use this process when you know the specific performance document for which the worker should be eligible.

#### Example

A worker had a special assignment for which there's a performance document available that is different than the worker's usual assignment. Navigate to the Determine Worker Eligibility for Performance Documents page and search for the worker name. In the Search Results section, select the worker name, and on the Manage Performance Document Eligibility page that appears, use the **Process Eligibility** action to process single document eligibility. Select the performance document. When processing is completed, the worker and the worker's manager can access the document.

### Changing Eligibility for a Worker

Change worker eligibility to force a worker to be eligible or ineligible for selected performance documents, or keep the worker eligible for a document.

## Forcing Eligibility for a Performance Document

You can make workers eligible for documents for which they don't currently meet the eligibility profile by forcing eligibility.

### Example

Your organization uses location as a criterion for eligibility profiles. A worker transfers from San Francisco to Beijing midway through the year. After she leaves, you run the eligibility batch process, making her ineligible to use the performance document for San Francisco-based workers. However, your organization's business processes state that she should be evaluated using the performance documents appropriate for both locations as she spent the minimum number of months required at each. Use the **Force eligible** option for the **Change Eligibility** action to change the San Francisco-based document from ineligible to eligible again. The worker and the worker's manager can access the document.

## Keeping Eligibility for a Performance Document

If a worker is currently eligible for a performance document, but a subsequent batch process removes the eligibility, you can maintain the worker's eligibility using the **Keep eligible** action. Use this action when a worker should remain eligible for a document, but due to changes to the worker's status or the eligibility profile associated with the document, the worker becomes ineligible after the batch process is run.

## Forcing Ineligibility for a Performance Document

When a worker is still eligible for a performance document but should not be, you can prevent the worker from accessing the document by forcing the worker to be ineligible. Use this feature if the worker's eligibility status changed after the batch process was run. This action prevents the worker from accessing a document for which she should no longer be eligible.

### Example

A worker transfers from the Sales organization and should no longer be eligible for the Annual Sales Evaluation performance document. Because the eligibility batch process was run before the worker left the Sales organization, she can still access the document. Use the **Force ineligible** option for the **Change Eligibility** action to process the Annual Sales Evaluation performance document. When processing is complete, she can't access the document.

## Updating Performance Tasks: Explained

You can move tasks in the process flow of a performance document forward to bypass a task, or back to redo previously-completed tasks. You can move tasks in performance documents for a group of workers or individuals. You move tasks using the Update Performance Tasks task in the Performance Management work area.

## Moving Forward to the Next Task


You can move a performance document forward from a task that hasn't been completed by a manager or worker to the next task in the process flow. Use this process to continue the evaluation process when a worker or manager doesn't complete a task. When you move forward past a task, the status of the task you passed becomes **Bypassed**.

To move a task forward, all performance documents you select to move must be on the same task in the process flow. You can move a performance document forward only one task at a time. To move a performance document forward more than one task, you must repeat the process.

## Accounting for Bypassed Tasks in Analytics and Tables

When you move a performance document forward past a task, the skipped task appears as **Bypassed** on these pages:

- My Evaluations (worker's view)
- My Manager Evaluations (manager's view)

 **Note:** A task that was completed by the manager using the Mark Task Complete feature also appears as **Bypassed** on the My Evaluations and My Manager Evaluations pages.

## Moving Back to a Previous Task

You can move performance documents from the current task back to a previously-completed task in the process flow. The current task is the task that is either in progress or not started, and the previous task is completed. The performance documents you select to move can have different tasks as the current task and must all be moved to the same previous task.

When a task has a subtask, the tasks are moved at the subtask level. For example, the Review Meeting task can have two subtasks: Indicate Review Meeting Held performed by the manager, and Acknowledge Review Meeting Held performed by the worker. You can move the Review Meeting task back to either subtask.

## Effects of Moving Tasks Back to Previously-Completed Tasks

When you move a task back, the status for all subsequent tasks changes to Not started and the tasks must be completed again. If the tasks were previously completed, any data that were entered are saved.

## Tasks Not Eligible for Moving Forward or Back

You can move all but two tasks forward or back: Set Next Period Goals and Manage Participant Feedback. You can't move these tasks because both can be performed in parallel with other tasks.

However, the Manage Participant Feedback task reopens if you move a performance document back to the Manager Evaluation task or an earlier task in the process flow. When the task is reopened, the previously-provided feedback isn't affected. However, managers and workers can select additional participants and send new feedback requests.

When you move an Approval task forward, the task is marked as **Bypassed**. However, the worklist and e-mail notifications are still delivered as if the task was completed by the approver.

## Recording Reasons for Moving Tasks

When you move tasks forward or back, you must select the reason for doing so. The reason code you select is used in reports, but isn't visible on the Performance Management pages. Only one reason code is stored for a task, so if you move a task more than once, only the latest reason code is stored.

## Updating Performance Tasks: Examples

You can move tasks in performance documents forward and back to keep an evaluation on track, or redo past actions. These scenarios illustrate typical reasons for moving tasks forward or back and the effects on the documents that you move.

## Moving a Task Forward When a Manager is on Leave

The process flow for the Support Center Annual Evaluation performance document includes the Worker Self-Evaluation task, Manager Evaluation, and Worker Final Feedback tasks. A line manager for the Support Center department, Daniel Wong, has provided overall ratings in the Manager Evaluation task for his direct reports. However, he hasn't completed comments for the individual goals and competencies yet. Daniel goes on long-term leave. The organization owner asks you to move the Manager Evaluation task forward so the workers can view their overall ratings.

On the Update Performance Tasks page, you select the Support Center Annual Evaluation performance document and Daniel Wong for the manager name. You select all the worker names and move the task forward for all of Daniel's direct reports.

All of Daniel's direct reports can now access the document to see the overall rating, and the Worker Final Feedback task is available for them to perform. The Manager Evaluation task is marked as **Bypassed** on the My Manager Evaluations page.

## Moving a Task Back to Reassess Goals

The process flow for the San Francisco Sales Organization performance document includes the Set Goals, Worker Self-Evaluation, and Manager Evaluation tasks. You're nearing the end of the performance cycle. Some workers are still setting their goals; others are performing their self-evaluations. Still others have completed their self-evaluations, and their managers are now performing the Manager Evaluation task.

An organization owner wants all workers and their managers in his organization to reassess worker goals for the evaluation because of new sales targets. On the Update Performance Tasks page, you search for the San Francisco Sales Organization performance document and select **All** for the task names. This search results in all worker documents no matter which task the workers or managers are currently performing. You select all the worker names, no matter what the current task status is, and move all back to the Set Goals task. The Set Goals task becomes the current active task.

## FAQs for Administration Tasks

### How can I move performance tasks forward to the next task?

On the Update Performance Tasks page, select the name of the performance documents for which you want to move tasks forward. You can filter the performance documents further by selecting additional search criteria. For example, use the **Task Name** field to narrow the search field to only those that are on the same task. In the **Search Results** region, select all worker names whose performance documents you want to move that are on the same task, and click **Move Task Forward**.

You can only move performance documents that are currently on the same task forward to the next task in the process flow.

### How can I move performance tasks back to a previous task?

On the Update Performance Tasks page, select the name of the performance document for which you want to move tasks back. You can filter the performance documents further by selecting additional search criteria. In the Search Results section, select all worker names whose performance documents you want to move to the same task, and click **Move Task Back**.

## How can I reopen performance documents to continue a worker evaluation?

Human resource (HR) specialists and managers can use the Reopen Performance Documents task to reopen performance documents so managers or workers can continue the worker evaluation. Managers can use the Reset Evaluation Status task to reopen a document so the worker can continue the evaluation. The Reopen Performance Documents and Reset Evaluation Status tasks appear in the Performance Management work area.

On the Reopen Performance Documents page, HR specialists and managers can search and locate documents that are in either Completed or Canceled status, and reopen the documents. The status of the Manager Evaluation of Workers task in a reopened document changes to **In progress**, as does the status of the performance document. The manager can then complete the task. If there is no Manager Evaluation of Workers task, the Worker Self-Evaluation task status changes to In Progress so the worker can complete the task. In both cases, the statuses of subsequent tasks in the process flow change to Not Started, and the evaluation can continue following the tasks configured for the performance document. When you reopen a document, all existing ratings, comments, and content items remain unchanged from before the document was reopened.

To locate eligible documents, the HR specialist and manager can search using worker name, performance document name, or both. HR specialists can reopen multiple documents at one time; line managers can only reopen one at a time.

To reset a completed worker self-evaluation task so the worker can access the task again, the manager can use the Reset Evaluation Status page. The manager can also reset the worker evaluation using the **Reset Evaluation Status** button on the performance document. Using either method, the manager resets the status of the Worker Self-Evaluation task to In Progress, and the worker can access the performance document to continue the evaluation. The statuses of subsequent tasks change to Not Started. The status of the performance document changes to In Progress. When you reset the task, all existing ratings, comments, and content items remain unchanged.





# 5 Performance Management Setup and Maintenance

## Performance Document Components: How They Work Together

To create a performance document you need a performance template. The performance template contains a document type, template sections, and a process flow. Create these either when creating the performance template, or select previously-configured ones.

### Document Types

Document types categorize the types of performance documents that are valid for an organization, such as an annual evaluation, a semiannual evaluation, a project evaluation, and so on. You set the dates to determine the time period that a document type is valid.

### Performance Template Sections

Sections form the structure of a performance document. The sections support the process flow used by the template.

In the sections you configure the types of content that can be rated and the processing options for ratings. You also determine the sources of content, and how the performance documents integrate with profiles and Oracle Fusion Goal Management goals. Sections can also contain options for managers and workers to provide final feedback about the evaluation.

### Process Flows for the Evaluation Process

Create process flows to determine which tasks workers, managers, and participants perform as part of the evaluation process. For example, you can include tasks to set goals, let managers and participants evaluate workers, and workers evaluate themselves. You can create as many process flows as required to correspond to the different evaluation requirements of your enterprise.

The process flow dictates which sections are required for the performance template. For example, if the process flow includes the task for managers to rate workers, you must set up Profile Content or Goals sections where managers can rate workers on competencies or goals, or an Overall Summary section where managers provide an overall rating.

### Performance Templates

Performance templates bring together the information that is used to create performance documents. In the performance template, you:

- Select the roles that can access the performance documents created from the template.
- Select existing eligibility profiles to restrict the performance documents to qualified workers.
- Specify the processing rules for the document.

- Enter the periods for which the performance documents are valid.
- Select the document type, sections, and process flows to use, and any additional content on which to rate workers. You can edit sections as required in the template.

#### *Related Topics*

- [Creating Performance Documents: Points to Consider](#)

## Rating Models

### Rating Models: Explained

Use rating models to rate workers on their performance and level of proficiency in the skills and qualities that are set up on the person profile. You can also use rating models to specify target proficiency levels for items on a model profile, so that the model profile can be compared to workers' profiles. Use the Manage Profile Rating Models task in the Profiles work area to create a rating model.

To rate workers on their performance and proficiency, attach rating models to the content types included in the person profile. Then you can rate workers on the items within the type. For example, you can rate workers on the Communication content item within the Competencies content type.

For model profiles, you can specify target proficiency levels for items on the profile, to compare model profiles with worker profiles. Using the ratings:

- Managers can compare a model profile to workers' profiles with and determine the best person suited to fill a position.
- Workers can compare their profile to model profiles to identify:
  - Suitable positions within the organization.
  - Skill gaps and fill the gaps before applying for other positions.

Rating models that measure workers' potential and the impact and risk of loss are also available.

Rating models can include some or all of the following components, depending on the use for the model:

- Rating levels
- Review points
- Rating categories
- Distributions

### Rating Levels

Rating levels identify the qualitative values, such as 1, 2, 3, or 4, that you use to rate a worker.

For rating models that are used by Oracle Fusion Performance Management, you must:

- Define numeric ratings, particularly for rating models in performance documents that use calculated ratings.
- Define rating levels using whole numbers, with the highest number indicating the best rating. Rating levels determine high and low ratings in the analytics.

## Review Points

Define review points for rating models in performance documents that use the average, sum, or band calculation method. The review points and point ranges that you define for the rating model are used to calculate ratings.

## Rating Categories

Using rating categories you can group rating levels together for analysis tools used in the talent review process, such as the box chart that is used in the talent review process. You can group rating levels into categories such as low, medium, and high, and those categories then become the labels for the analytic. You should not change rating categories after setting them up, as the changes could affect the analytic.

## Distributions

Oracle Fusion Compensation Management and Oracle Fusion Performance Management both use rating model distributions to determine the targeted minimum and maximum percentage of workers that should be given each rating level.

Compensation Management uses the distribution values that you set up directly on rating models. However, you can set up distributions using the Manage Target Ratings Distribution task for rating models that are used in Performance Management.

### Related Topics

- [Selecting Box Chart Matrix Options for the Talent Review Template: Critical Choices](#)

## Updating Talent Ratings: Explained

Talent ratings are ratings that are used to evaluate a worker, including performance, potential, proficiency, readiness, and impact. Ratings are used in multiple products within the HCM product family such as Oracle Fusion Profile Management, Oracle Fusion Performance Management, and Oracle Fusion Talent Review.

## Talent Rating Types

The following table displays the talent ratings and their descriptions. Depending on application settings and roles assigned, you can view, add, and update these talent ratings across multiple products within the HCM product family.

Talent Ratings	Description
Talent score	Evaluate a person's overall value to the organization using a rating model your organization defines.
Performance rating	Evaluate an item, section, or overall performance document.
Potential level	Evaluate a person based on the execution of the person's work.
Potential score	Evaluate a person's attainable level of excellence or ability to achieve success.
N box cell assignment	Evaluate a person's current contribution and potential contribution to the organization on a box chart matrix with N boxes. N represents the number of boxes in the grid.
Advancement readiness	Evaluate a person's readiness for the next position in their career development.
Risk of loss	Evaluate the likelihood of a person leaving the company.

Talent Ratings	Description
Impact of loss	Evaluate the real or perceived effects on an organization when the person leaves.
Proficiency	Evaluate a person's skill level for a competency.
Behavior ratings	Evaluate a person's actions for a behavior associated with a competency.

## Updating Talent Ratings

You can update talent ratings depending on application settings and roles assigned to you. The following table shows where talent ratings can be updated.

Talent Ratings	Can Be Updated in Portrait?	Can Be Updated in Talent Review?	Can Be Updated in Performance Management?	Can Be Updated in Succession Management?
Talent score	Yes	Yes	No	No
Performance rating	Yes	Yes	Yes	No
Potential level	Yes	Yes	No	No
Potential score	Yes	Yes	No	No
N box cell assignment	No	Yes	No	No
Advancement readiness	Yes	No	No	No
Risk of loss	Yes	Yes	No	Yes
Impact of loss	Yes	Yes	No	Yes
Proficiency	Yes	No	Yes	No
Behavior ratings	Yes	No	No	No

When you update talent ratings:

- The performance rating on a performance document is always the one entered by the manager during a worker's performance evaluation. The performance rating from the worker's performance document is then displayed on the worker's profile when configured to do so in the performance template.
- In Oracle Fusion Compensation Management, if configured, you can also update the performance, goals section, and competencies section ratings, which appear in performance documents.
- The talent review process uses talent ratings on the worker's profile to build talent review information. When a talent review meeting concludes, a worker's profile is automatically updated with the calibrated ratings. Therefore, the

performance rating displayed in a worker's performance document might be different from the one displayed in the worker's profile.

#### *Related Topics*

- [Performance Ratings: Points to Consider](#)
- [Customizing the Skills and Qualifications Page to View Talent Ratings: Procedure](#)

## Questionnaires

### Questionnaires: Explained

You can create questionnaires to gather information in applications that support them. For example, you can use questionnaires to collect participant feedback in a performance evaluation. This topic describes aspects of questionnaire creation and maintenance. Use the Manage Questionnaires, Manage Question Library, and Manage Questionnaire Templates tasks in the Setup and Maintenance work area.

### Questionnaire Templates

All questionnaires are based on templates, which promote consistency. You can configure templates for:

- Specific applications
- General audiences, such as an entire organization or all internal customers
- Targeted audiences, such as particular roles (managers, for example)
- Specific purposes, such as providing feedback for performance evaluation periods or rate worker potential in an assessment for a talent review

### Questionnaire Presentation

You can specify how the questionnaire appears in the subscriber application. For example, you can:

- Make the questionnaire single- or multiple-paged.
- Add sections to group questions by type or other classification.
- Mark questions as required.

### Questions and Responses in the Question Library

You create questions in the question library. Four types of questions exist:

- Text
- Single Choice
- Multiple Choice
- No Response

For each question type, you also configure responses and select a presentation method. For example, for single-choice questions, you can specify that the possible responses appear either in a list or as radio buttons.

## Questionnaire and Template Access

You can control access to questionnaires and templates by setting privacy options. If you set the **Privacy** option to **Private**, then only the named owner can edit the questionnaire or template. Otherwise, anyone with access can edit the questionnaire or template.

## Questionnaire Templates: Explained

This topic describes how questionnaire template options affect questionnaires generated from the template. You can override some of these options in individual questionnaires.

Use the Manage Questionnaire Templates task in the Setup and Maintenance work area.

### Section Presentation and Order

A questionnaire has at least one section. You can use sections to group questions by type or category, for example.

The **Section Presentation** option controls how the questionnaire uses sections. This table describes the Section Presentation values.

Value	Description
<b>No Sections</b>	One section appears that contains all questions.
<b>Stack Regions</b>	Multiple sections appear as specified on the <b>Section Order</b> option.

The **Section Order** option controls section order. This table describes the **Section Order** values.

Value	Description
<b>Sequential</b>	One section appears that contains all questions.
<b>Random</b>	Multiple sections appear as specified on the <b>Section Order</b> option.

You can specify whether questionnaires based on this template can override these values.

### Question and Response Order

The **Default Question Order** and **Default Response Order** values control the default order of questions and responses in a section. Response order can vary for single-choice and multiple-choice questions only.

This table describes the Default Question Order and Default Response Order values.

Value	Description
<b>Vertical</b>	Questions appear in the specified order.
<b>Random</b>	Question order changes randomly whenever a user access the questionnaire.

You can override the default values of these options for individual sections. You can also specify whether questionnaires based on this template can override these values.

## Allowed Response Types

The Allowed Response Types value identifies the response types that can appear in questionnaires created from the template. Only questions with the selected response types can appear.

For example:

- If you select neither **Single Choice from List** nor **Radio Button List**, then you can't include single-choice questions.
- If you select both **Radio Button List** and **Check Multiple Choices**, then you can include both single-choice and multiple-choice questions. However, each can use only the selected response type.

## Section Format

The **Allow Additional Questions** option controls whether authorized users can add questions in the subscriber application. For example, for performance documents, that could be managers or workers.

If you select the **Required** option, then respondents must answer all questions in the section. Subscriber applications can override this setting.

If you select **New Page**, then the section starts a new page. A section may fill more than one page, depending on the number of questions specified in the **Maximum Number of Questions per Page** field.

## Questions and Responses in Sections

In the Questions table, you manage questions for a selected section. You can:

- Add questions from the question library. You can change the response type for these questions.
- Remove questions.
- Change question order using drag and drop. Questions appear in this order in the questionnaire if question order is **Vertical** for the section

If the section itself isn't required, then you can mark individual questions as required. Otherwise, respondents must answer all questions.

# Questionnaire Question and Response Types: Explained

You can include text, single-choice, multiple-choice, and no response questions in questionnaires. This topic explains how to construct questions of each type and define the expected responses. Use the Manage Question Library task in the Setup and Maintenance work area.

## Text Questions

Respondents enter their responses in a text field. For the response, you can specify:

- Both a minimum and a maximum number of characters.
- Either plain text or rich text. Select rich text to let respondents use formatting, such as bold and underline.

## Single-Choice Questions

Respondents select one response from several. You specify whether the responses appear in a list or as radio buttons.

Respondents can select either from responses that you define or from a rating model. When you associate a rating model with the response type, possible responses come automatically from the rating model. For example, if the rating model contains five rating levels, then the short description, name, and level for each level appear as responses from which the respondent can select.

## Multiple-Choice Questions

Respondents can provide one or more answers. Specify whether the responses are presented as check boxes or a choice list. You can set both a minimum and maximum number of required responses. As for single-choice questions, you can associate a rating model with the response type.

## No-Response Questions

Use this question type when no response is required. You can use it to add instructions or information to the section.

## Attachments

For all types of questions, including no-response questions, specify whether respondents can add attachments.

# Creating a Questionnaire: Procedure

This topic summarizes how to create a questionnaire. Use the Manage Questionnaires task in the Setup and Maintenance work area. Select **Navigator - Tools - Setup and Maintenance**.

## Selecting the Questionnaire Template

1. In the Search Results section of the Manage Questionnaires page, click **Create**. The Create Questionnaire dialog box opens.
2. Enter **Questionnaire Template ID** or **Name** values, if available. Alternatively, click **Search** to list all available templates.
3. In the Search Results section, select a template and click **OK**. The Create Questionnaire: Basic Information page opens.

## Entering Questionnaire Basic Information

1. A unique numeric questionnaire ID appears automatically. You can overwrite this value.
2. Enter a questionnaire name and select a folder. Use folders to organize questionnaires by type or purpose, for example.
3. Leave the **Owner** field blank and the **Privacy** value set to **Public** if anyone who can access the questionnaire can edit it. Otherwise, select an owner and set **Privacy** to **Private**.
4. In the **Subscriber** field, select an application to use the questionnaire, if appropriate. Other applications can't use the questionnaire if you select a subscriber.
5. Leave the **Status** value set to **Draft** until the questionnaire is ready.
6. In the **Instructions and Help Materials** section, enter and format any instructions for questionnaire users. This text appears at the top of page one of the questionnaire.
7. Add file or URL attachments, if appropriate. Links appear at the top of the questionnaire and beneath any instruction text.
8. Click **Next**. The Create Questionnaire Contents page opens.

## Entering Questionnaire Contents

The **Section Order**, **Section Presentation**, and **Page Layout** values are as specified in the questionnaire template. Depending on template settings, you may be able to change these values. Sections appear as defined in the questionnaire



template. Depending on template settings, you can edit some or all section settings. You can also delete predefined sections and create additional sections.

1. Select the first section to view its questions in the **Questions** section. You can delete a question or change its response type and **Required** setting.
2. If you create additional sections, you add questions to them. In the Questions section, click **Add** to open the Add Questions dialog box. Search for a question, select it, and click OK.
3. When all sections and questions are complete, click **Next** to open the Create Questionnaire Review page.
4. Click Preview to preview the questionnaire.
5. Click **OK** to close the Preview dialog box. Click **Save** to save your questionnaire.

Set the questionnaire **Status** value to **Active** when the questionnaire is ready for use.

## Using Questionnaires in Performance Documents: Explained

Create questionnaires to add to performance documents to gather feedback about workers from participants other than direct managers. Managers can use the feedback to help them evaluate workers.

Questionnaires enable you to:

- Capture feedback in performance documents
- Collect information on a worker other than competencies and goals
- Configure questions for specific audiences and periods

You create questionnaires using the Manage Questionnaires task in the Setup and Maintenance and Performance Management work areas.

### Capturing Feedback in Performance Documents

Using questionnaires allows your organization to get feedback from multiple sources to provide a more rounded evaluation and view of a worker's performance. Use questionnaires to capture feedback from the worker being evaluated, the worker's manager, peers, colleagues, other managers, internal customers, or any other role in the organization. Participant feedback captured in a performance document can't be used to rate workers in the performance document, but managers can use it to help determine how to rate workers.

Respondents access questionnaires in the performance documents. Managers, workers, or both, manage participant feedback to select participants, and assign them roles to determine which questionnaires they respond to.

### Collecting Information on a Worker Other than Competencies and Goals

You can use questionnaires to gather data about workers that isn't specifically about competencies and goals, thus extending the range of information concerning the worker's performance and development.

For example, you can ask the manager or worker to:

- Identify strengths of the worker, or areas that require more development.
- Describe the top three achievements of the worker during the previous year.
- Discuss the worker's satisfaction in the current role.

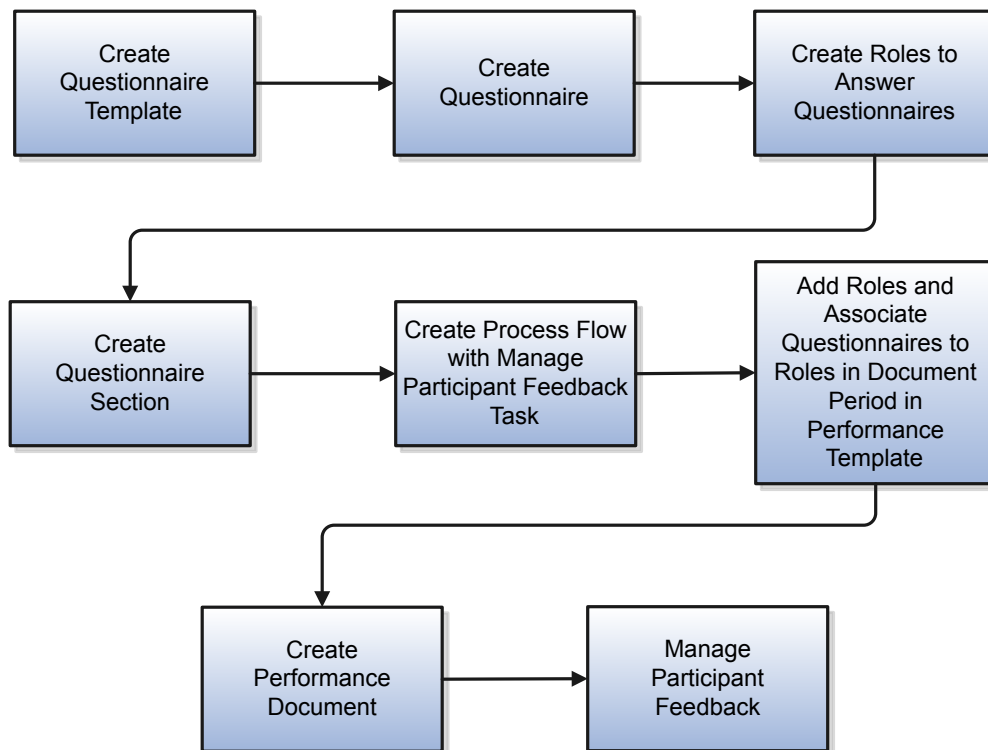
### Configuring Questions for Specific Audiences and Periods

You can configure questionnaires to target general audiences, or specific groups, such as managers, workers, peers or other roles. You must associate questionnaires with performance template periods, and assign the roles that respond to the questionnaire. This enables you to create questionnaires that concentrate on specific periods, or can be used over multiple periods.

## Performance Documents and Questionnaires: How They Work Together

You can add questionnaires to performance documents to enable participants to provide feedback during a performance evaluation. To add questionnaires to performance documents, you must first create questionnaire templates and questionnaires, and configure the elements that make up a performance template to include questionnaires.

This figure illustrates the steps required to add questionnaires to performance documents and track feedback.



You manage questionnaire templates and questionnaires, questions, roles, process flow performance template sections and performance templates in the Setup and Maintenance and Performance Management work areas. You manage participant feedback in performance documents in the Performance Management work area.

### Create Questionnaire Template

Create a questionnaire template from which to create a questionnaire and assign Performance 360 as a subscriber application to make it available in performance documents. In the template, you can format the layout and questions to include in the questionnaires made from it. You can create as many questionnaire templates as needed.

### Questionnaire

Create the questionnaire from an available template. Create as many questionnaires as required for your business process. For example, if your organization requires feedback from multiple roles, such as other managers, peers, or internal customers,

you may need a different questionnaire for each role. You may also require different questionnaires for each performance evaluation period, or that cover all periods. You can edit questionnaires created from the template as required.

## Roles

You must create all the roles that will access questionnaires in a performance document, with the exception of manager and worker, which are default roles. You associate roles with the questionnaire in the performance template to make them available to the role. Managers, workers, or both, select the roles that apply to each participant when managing participant feedback to determine which questionnaire a participant uses.

## Process Flow

To make participant feedback available in a performance document, you must create a process flow that includes the Manage Participant Feedback task. Specify whether managers, workers or both, can manage and track participant feedback.

## Section

Create a Questionnaire section to include in the performance document. The Questionnaire section is the only section type that can contain questionnaires. The questionnaire appears as a tab in the performance document. Add all the roles that will access the questionnaire to the section.

## Performance Template

In the performance template you add the roles, process flow, and Questionnaire section that you created for the questionnaire. To the document periods you add the roles that you want to be able to access the questionnaire, and specify the questionnaire to associate with each role. Managers and workers can also be requested to answer questionnaires. To do so, you must add them to the document period.

In the template, you can also specify the minimum number of participants required to answer the questionnaire for each role, and a total minimum number of participants for each document. These settings are guidelines and aren't enforced.

## Performance Document and Participant Feedback

After the performance document is created, the manager, worker, or both, can select participants, send requests for feedback, and manage the feedback. Depending on the settings in the questionnaire, managers or workers can add additional questions to the questionnaire. The ability to manage participant feedback is determined by the process flow settings.

Participants, other than workers and managers, can access the Questionnaire section of the performance document. Depending on how the performance template and process flow are configured:

- Participants can provide comments that appear in the Overall Summary section for managers and workers to review
- Workers and managers can access the Questionnaire section to view participant feedback

When the manager submits the performance document, the participant feedback is locked and participants can't add or edit feedback. Any feedback participants didn't submit before the document is locked won't be included in the performance document.

## FAQs for Questionnaires

### What happens if I edit a questionnaire that's in use?

You're prompted to either create a new questionnaire or update the existing version.

If you update the existing version, it replaces the current questionnaire. Respondents access the latest version wherever it appears. You can mark new sections and questions as required only if no one has yet responded to the questionnaire.

## Performance Roles

### Performance Roles: Explained

Create roles to expand the scope of the performance evaluation to include feedback from participants other than the worker and the worker's manager. To implement multiparticipant feedback, you must first define the roles that can participate in the process. You create performance roles using the Manage Performance Roles task in the Setup and Maintenance and Performance Management work areas.

To make roles eligible to provide feedback, you must:

- Define performance roles.
- Provide a description for the role.
- Make roles available for the performance document.
- Associate questionnaires to the roles when using questionnaires.

### Defining Performance Roles

You can create as many roles as required for the evaluation process that your organization employs. For example, you might have roles such as peer or mentor, or additional managers as part of a matrix management review. Every role that you create is classified as a participant role type.

To enable the role you create to view ratings and comments submitted by workers, managers, and other participants, select **Allow role to view worker and manager evaluations**. For participants with this role, they can view all ratings, comments, and questionnaires submitted by all other roles when they open the performance document from the My Feedback Requests page.

The manager and worker roles are required; you can't delete or edit them. You can, however, create performance templates that don't require either the manager or worker role to answer a questionnaire or rate workers. In this case, you must add the role names to the template to permit the manager or worker to view feedback.

### Providing a Role Description

Along with the role name, you can add a description for the role. The description appears on the Manage Participant Feedback pages to assist users in determining which role to assign to each participant.

## Making Roles Available to Access the Performance Document

The participant roles you create, along with the manager and worker roles, are eligible to access the performance document to provide ratings and comments on content, and feedback on questionnaires. You must select the roles in the performance template to make them available to access the performance document.

## Associating Questionnaires with Roles

Each role is eligible to respond to only one questionnaire for each performance document within a performance period. However, you can assign more than one role to participants so they can complete more than one questionnaire. You associate roles with the questionnaires that the role uses in the performance template. You assign roles to participants using the Manage Participant Feedback task in the Performance Management work area.

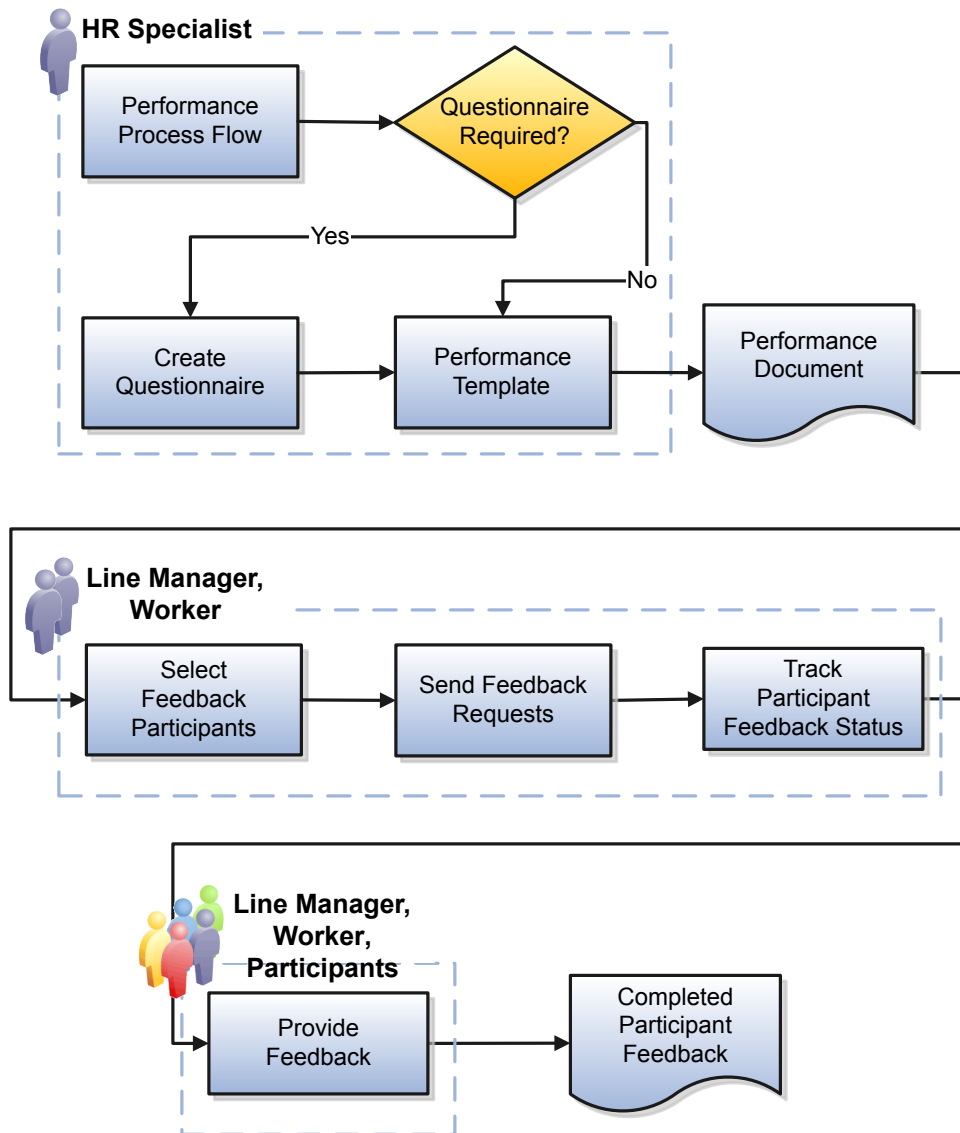
## Participant Feedback: Explained

The Manage Participant Feedback task enables individuals other than the line manager and worker to provide direct feedback into the worker's performance document. Additional roles providing feedback might include peers, mentors, customers, and other managers, such as matrix managers. The additional roles providing feedback are called participants. Participants can evaluate workers on content items by providing ratings, comments, or both, and respond to a questionnaire to provide a 360-degree evaluation. Participant feedback is recorded as part of the official performance evaluation. By including a variety of participants who have worked to some capacity with the worker, the manager can obtain a broader view of the worker's performance to assist in the evaluation.

The Participant Feedback process provides the ability to:

- Specify who can request and track participant feedback.
- Provide multiparticipant feedback according to role.
- Use questionnaires to provide feedback.
- View participant names, roles, and feedback.
- Submit feedback and complete the Participant Feedback process.
- Print feedback.

The following figure shows the steps for gathering participant feedback.



## Specifying Who Can Request and Track Participant Feedback

The human resource (HR) specialist configures the process flow to specify whether managers, workers, or both, can select participants to provide feedback, add questions to the questionnaire, and track feedback request and completion status. Managers and workers use their respective versions of the Manage Participant Feedback page to perform the participant feedback tasks.

When the manager or worker requests feedback, participants receive workflow notifications of the request. Participants access the performance document on the My Feedback Requests page or from links on their worklist.

Managers and workers can track participant feedback to monitor its status to see whether it's started, in progress, or completed. Depending on configuration, workers can also see the feedback itself and the names of the participants who provided the feedback.

Managers and workers can remove a participant from a performance evaluation, or change the role (for example, change a mentor to a peer), provided the participant hasn't yet provided feedback.

## Providing Multiparticipant Feedback by Role

HR specialists create the participant roles that can rate worker competencies, goals, overall performance, and answer questionnaires. They can configure a role that allows participants also to view ratings, comments, and questionnaires provided by the worker, other managers, and participants. In the performance template, the HR specialist selects the roles that can provide feedback in the Profile Content (Competencies), Goals, and Overall Summary sections. The HR specialist can associate separate questionnaire templates, with different questions, to each role.

Managers and workers, if permitted, can select participants of varying roles to provide feedback and notify them to provide feedback. The managers and workers can add the same participant more than once to a performance document. They can select the same role or a different one for the participant. The participant responds to the questionnaires associated with the roles, even if the questionnaires are the same.

Participants can't add or edit content, such as competencies or goals in the performance document, unlike managers and workers.

## Using Questionnaires to Provide Feedback

Participants, as well as managers and workers, provide feedback by answering questions about the worker on a questionnaire that the HR specialist adds to the performance document in the performance template. The questionnaire is a performance template section, and appears as a tab in the performance document, just as do other sections, such as the Goals or Overall Summary sections.

The manager and worker, if allowed, can add questions they create to the questionnaire that's provided for the performance document. They can add questions only to the questionnaires that are associated with the participant roles they select. You must also configure the questionnaire to allow them to add additional questions.

The HR specialist creates questionnaires using the Manage Questionnaire Templates and Manage Questionnaires tasks in the Setup and Maintenance work area.

## Viewing Participant Names, Roles, and Feedback

Line managers, matrix managers, and workers, if allowed, can view the names and roles of the requested participants, along with the ratings, comments, and feedback they provided. You can configure the performance template so that participants can provide overall comments about the worker instead of answering questions on the questionnaire. Participants can't view ratings, comments, or questionnaire responses provided by the worker, manager, or other participants.

## Submitting Feedback and Completing the Participant Feedback Process

Line managers, matrix managers, and workers if allowed, can view ratings, comments and feedback when the participant submits the performance document and questionnaire. Participants can continue to provide feedback until the manager either locks the feedback process or completes the Manager Evaluation of Workers task and submits the performance document to continue the performance evaluation process.

## Printing Feedback

Managers and workers can print participant feedback, as they can with other performance document content. They can, however, only print the content which their role is configured to see. For example, if the performance process flow is configured so the worker can't view participant feedback, the worker can't print it.

# Matrix Management

## Configuring Matrix Management for Performance Documents: Procedure

This topic summarizes how to configure performance roles, process flows, and templates to use matrix management in performance documents. Matrix managers can then access performance documents on the My Feedback Requests page in the Performance Management work area to evaluate workers.

Matrix managers for a worker are additional managers who aren't defined as the worker's line manager. You assign managers to workers using the Manage Employment task (Navigator - Person Management).

### Prerequisites

Create the sections required by the process flow, including:

- Profile Content (Competencies)
- Goals
- Questionnaire
- Overall Summary
- (Optional) Worker Final Feedback
- (Optional) Manager Final Feedback

### Creating a Role

You can create participant roles that can access:

- Performance documents to review workers and view the ratings, comments
- Questionnaires submitted by workers and other managers and participants

Use the Manage Performance Roles task in the Setup and Maintenance work area (Navigator - Tools - Setup and Maintenance).

1. In the Setup and Maintenance work area, select the **Manage Performance Roles** task.
2. In the Search Results section of the Manage Performance Roles page, click **Create**. The Create Performance Role page opens.
3. Enter a role. The role can be that of additional managers who are expected to review workers, or any other name. The role is eligible to select for inclusion in the performance template.
4. Enter a description. Descriptions appear on the Manage Participant Feedback pages to assist users in determining which role to assign to each participant.
5. Enter the **From Date** and **To Date**. These dates must be the same as or extend beyond the date range of the performance templates in which they're used.
6. Set the **Status** value set to **Inactive** until the role is ready.
7. Select **Allow role to view worker and manager evaluations** so the matrix manager role is eligible to view evaluations performed by the worker and other managers.
8. Click **Save and Close**.



## Creating a Performance Process Flow

You must add the Manage Participant Feedback task to the performance process flow so additional managers can:

- Add ratings and comments
- View ratings and comment submitted by the worker and line manager

Use the Manage Performance Process Flows task in the Setup and Maintenance work area (Navigator - Tools - Setup and Maintenance).

1. In the Setup and Maintenance work area, select the **Manage Performance Process Flows** task.
2. In the Search Results section of the Manage Performance Process Flows page, click **Create**. The Create Performance Process Flow page opens.
3. Enter a name and optionally, a description.
4. Enter the **From Date** and **To Date**. These dates must be the same as or extend beyond the date range of the performance templates in which they're used.
5. Set the **Status** value set to **Inactive** until the process flow is ready.
6. Optionally, in the Set Goals section, select the Set Goals options to include the task in the process flow.
7. In the Manage Worker Self-Evaluation and Manager Evaluation section, select **Include worker self-evaluation task** so workers can evaluate themselves.
8. Select **Include manager evaluation of worker task** so line managers can evaluate their direct reports.
9. Select **Evaluation tasks can be performed concurrently** to let workers and managers evaluate the worker at the same time.
10. In the Participant Feedback section, select **Include manage participant feedback task** to make participants eligible to access the performance document.
11. Select other options as required by your business process.
12. In the Approval, Review and Meetings, and Set Next Period Goals sections, select the options required for your business process.
13. Select the Task Names tab.
14. Enter the sequence numbers and names for the tasks.
15. Click **Save and Close**.

## Configuring the Performance Template General Tab

You must add all roles, including the matrix manager roles you created, to the performance template in the Participation section of the General tab, and to the sections on which you rate workers so they can view and provide ratings and comments. Use the Manage Performance Templates task in the Setup and Maintenance work area (Navigator - Tools - Setup and Maintenance).


1. In the Setup and Maintenance work area, select the **Manage Performance Templates** task.
2. In the Search Results section of the Manage Performance Templates page, click **Create**. The Create Performance Template page opens.
3. On the General tab, enter a name and optionally, comments.
4. Enter the **From Date** and **To Date**. The **From Date** must be the same or later than, and the **To Date** the same as or earlier than the From Date and To Date range of the performance document type, process flow, roles, and sections used in the template.
5. Set the **Status** value set to **Inactive** until the role is ready.
6. Select a document type.
7. In the Eligibility Profile section, add eligibility profiles to limit the performance documents to eligible workers, if required by your business process.
8. Optionally, in the Participation section, select **Set the minimum number for each participant role** to warn managers and workers when they don't select the minimum numbers of participants.

9. In the **Total minimum number of participants required in the document** field, enter the minimum participant number for the entire performance document.
10. In the Participation section, click the **Add** icon.
11. In the **Role** column, select the **Manager** role.
12. Repeat steps 10 and 11, for the **Worker** role, the roles you created for matrix managers, and any other participants who use performance documents created from the template.
13. For each participant role, enter the minimum number of participants required per role if you specified that participant feedback is required.
14. Select the Process tab.

## Configuring the Performance Template Process Tab

On the Process tab, you add the process flow and configure participation options for matrix management.

1. In the Process Flow field, select a process flow that contains the Manage Participant Feedback task.
2. Configure the Alerts, Calculation Rules, and Processing Options sections as required for your business process.
3. In the Participant Options section, select the options to achieve the wanted results as shown in the table.

 **Note:** The options in the table are available only if you add a matrix manager role to the Participation section of the General tab.

Option	Impact
Participant feedback is required	Requires managers to send at least one feedback request to a participant.
Worker can view the participants added by manager	Workers can see participants' names in the performance document, if configured on the Structure tab of the template.
Auto-populate matrix managers of the worker as participants	Matrix managers appear automatically on the participant list in the Manage Participant Feedback task, and line managers don't have to manually select matrix managers as participants.
Default participant role	Assigns the selected role to auto-populated matrix managers.
Allow matrix managers to access worker document automatically	Matrix managers can to access the document as soon as it's created. If this option is not selected, then the line manager must send a notification manually on the manage Participant Feedback page.

4. Select the Structure tab.

## Configuring the Performance Template Structure Tab

On the Structure tab, you add and configure the sections required by the process flow. You add and configure roles in the Processing by Role section.

1. In the Sections section, select the Profile Content section. You might have named it with a different name.
2. Configure the Section Processing, Item Processing, and Section Content sections as required to conform to your business process.
3. In the Processing by Role section, click the **Add** icon.
4. In the **Role** column, select **Manager** to grant access to the section.
5. Complete the fields as wanted for the manager as shown in this table. For all other processing options, leave the default values, or select others as wanted. Repeat steps 3 through 5 for granting access to workers, matrix managers, and other participants. Complete the fields, as shown in this table.


Role	Share Ratings	Share Comments	Participant Name Can Be Viewed by the Role	Participant Role Can Be Viewed by the Role
Manager	Yes to share ratings with worker	<b>Yes</b> to share comments with worker	<b>Yes</b> to let manager view participant name, <b>No</b> to display participants only as <b>Participant</b>	<b>Yes</b> to let manager view participant role, <b>No</b> to display participant roles as <b>Participant</b>
Worker		<b>Yes</b> to share comments with worker	<b>Yes</b> to let worker view participant name, <b>No</b> to display participants only as <b>Participant</b>	<b>Yes</b> to let worker view participant name, <b>No</b> to display participants only as <b>Participant</b>
Matrix Manager	Yes to share ratings with worker	<b>Yes</b> to share comments with worker	Inherits Manager setting	Inherits Manager setting
Participants	Yes to share ratings with worker	<b>Yes</b> to share comments with worker		

6. Select the Content tab.

## Configure the Performance Template Content, Document Periods, and Summary Tabs

Complete the performance template by configuring the Content, Document Periods, and Summary tabs. On the Document Periods tab, you can add questionnaires and assign roles to access them.

1. Add content to the Profile Content and Goals sections as required for your business process.
2. Select the Document Periods tab.
3. Add periods as required for your business process.
4. In the Eligibility Profile for the Period section, add eligibility profiles if required by your business process.
5. In the Due Dates section, enter task due dates.
6. In the Questionnaires for the Period section, click the **Add** icon. Questionnaires are optional to provide participant feedback.
7. In the Role field, select a role that can access the questionnaire.
8. In the Questionnaire field, select an existing questionnaire.

 **Note:** The worker's line manager can select a different questionnaire for the role in the Manage Participant Feedback task.

9. Repeat steps 6 through 8 to add additional roles and questionnaires.
10. Select the Summary tab.
11. Review your selections and click **Save and Close**.

### Related Topics

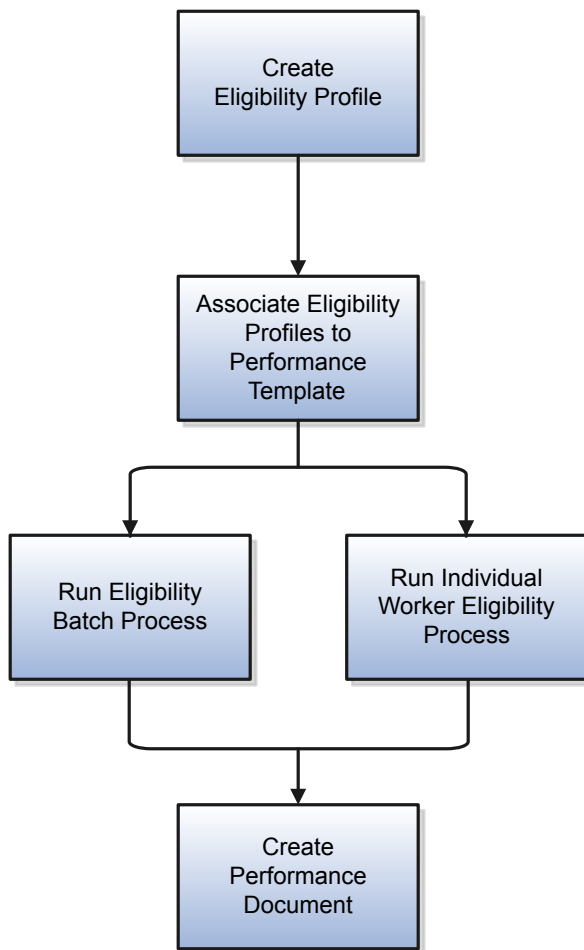
- [Using Matrix Management with Performance Evaluations: Explained](#)

## Eligibility Profiles

## Using Eligibility Profiles with Performance Documents: Explained

You can use eligibility profiles to restrict availability of performance documents to a specific population based on criteria you set up. If you don't associate eligibility profiles with a performance document, the document is accessible by everyone in the organization.

This figure shows the steps required to set up and use eligibility profiles for performance documents.



### Creating Eligibility Profiles

You create eligibility profiles to match the business requirements for your performance evaluation business process. For example, you can create eligibility profiles to evaluate workers in a specific department, job, location, or other criteria. You can also combine criteria. For example, you can create a performance document to evaluate every person in the Sales department who is a manager level 3, and located in California. You can either create one eligibility profile with those three criteria, or create three separate profiles with each criterion. You create eligibility profiles using the Manage Talent Eligibility Profiles task in the Setup and Maintenance and Performance Management work areas.

When creating an eligibility profile for performance documents, you can select any profile usage. However, because eligibility for a performance document is determined by assignment, you must select **Specific assignment** as the assignment to use. **Specific assignment** is automatically selected if you first select **Performance** as the profile usage. Then, when the eligibility

process is run, it evaluates every assignment for a worker to determine which, if any, performance documents the worker is eligible to use for each assignment.

## Associating Eligibility Profiles with Performance Templates

You select eligibility profiles to associate with performance templates at the template level and on performance document periods. When you select eligibility profiles, the performance documents made from the template are available only to the workers who meet the criteria.

You can associate eligibility profiles for any profile usage to a performance template. However, only those with the assignment to use set to **Specific assignment** are available to associate with performance templates.

Eligibility profiles can either be required, or not required, and can be used in combination so that workers must match some, or all criteria.

## Running the Eligibility Process

To determine which workers are eligible for performance documents that use eligibility profiles, you must run the eligibility process. You can:

- Run a batch process to analyze a large worker population to determine who is eligible for performance documents based on the parameters you enter.
- Process eligibility for a single worker to determine which documents the worker is eligible to use, and change the worker's eligibility for a document.

To run the batch process, use the Manage Eligibility Batch Process task in the Setup and Maintenance and Performance Management work areas. Process eligibility for a worker using the Determine Worker Eligibility for Performance Documents task in the Performance Management work area.

## Accessing the Performance Documents

When a worker is eligible for a performance document, it appears on the My Manager Evaluations page of that worker's direct manager, along with documents that aren't associated with eligibility profiles. Managers can view performance documents for which their direct or indirect reports, or workers for whom they are the document manager (such as for a project), are eligible. The document also appears on the worker's My Evaluations page. Both the worker and manager can access the document.

If the worker has created that performance document and the eligibility process is run again, but now the worker is ineligible, that document remains visible to both the worker and manager. Both can continue to access the document.

However, if the worker didn't create the performance document and the eligibility process is run again, making the worker no longer eligible for the document, that document disappears from the My Evaluations page for that worker. Neither the worker nor the manager can access that document for the worker. If other direct reports of that worker's manager are still eligible for the document, it remains available on the My Manager Evaluations page for those workers.

### Related Topics

- [Processing Performance Document Eligibility for a Single Worker: Points to Consider](#)
- [Eligibility Profiles: Explained](#)
- [Eligibility Profiles and Performance Analytics: Explained](#)

## Using Eligibility Profiles with Performance Documents: Examples

With eligibility profiles, you can target performance documents to evaluate a specific population of workers. These scenarios illustrate how human resource (HR) administrators can create eligibility profiles and run the eligibility process to make the documents available to workers and managers.

### Creating Eligibility Profiles and Running a Batch Process for an Organization

The organization wants to create a performance document to compare how the sales force is performing across all departments in the US. The HR administrator creates an eligibility profile, called US Sales Team, and selects **Performance** for the profile usage. The assignment to use value automatically becomes **Specific assignment**. The HR administrator selects criteria for all active workers who are:

- Active, not on leave
- Located in the US
- Employed in the Sales job family

The HR administrator or implementor completes these steps:

1. Creates a performance template, with a performance document period for the current evaluation period named US Sales Annual Evaluation.
2. Adds the US Sales Team eligibility profile to the document period.
3. Runs the eligibility batch process to find all eligible salespeople to make the US Sales Annual Evaluation performance document available to them and their managers to start the evaluations.

You run the eligibility batch process using the Manage Eligibility Batch Process task in the Setup and Maintenance and Performance Management work areas.

### Adding Eligibility when a Worker Transfers to an Organization

A new worker, Lee Smith, is hired into the Sales department under manager John Hsing after the batch process was already run and performance documents were created for the Sales team. Lee isn't initially eligible for the US Sales Annual Evaluation period document, but should be, since she joined Sales midway through the evaluation period. The HR administrator completes these steps:

1. Navigates to the Determine Worker Eligibility for Performance Documents page in the Performance Management work area, and selects Lee Smith.
2. On the Manage Performance Document Eligibility page, selects US Sales Annual Evaluation as the single document to process for Lee.

Lee and John can then access the performance document to begin the evaluation at the appropriate time.

### Forcing Eligibility when a Worker Transfers from an Organization

Taylor Wong transfers from the US Sales department to the Hong Kong Sales department midway through the period covered by the US Sales Annual Evaluation performance document. The HR administrator has run the batch eligibility process for the last time after Taylor transferred, making Taylor ineligible to use the US Sales Annual Evaluation performance document. However, the organization process requires that Taylor be evaluated using performance documents for both his old and new locations.

The HR administrator completes these steps:

1. Navigates to the Determine Worker Eligibility for Performance Documents page, and selects Taylor Wong.

2. On the Manage Performance Document Eligibility page, clicks the Change Eligibility button, selects the US Sales Annual Evaluation performance documents, and specifies to force it eligible.

Even though Taylor no longer meets the eligibility criteria, he and his new manager can access the performance document to perform the evaluation.

#### Related Topics

- [Eligibility Profiles: Explained](#)

## Eligibility Batch Process

### Performance Document Eligibility Batch Process: Explained

You can run the eligibility batch process to determine which performance documents a population of workers is eligible to use for their performance evaluation. When the process is complete, the documents are available to workers and their managers to begin the evaluation. Use the batch process to process eligibility for all workers in an organization, and either indeterminate or specific documents, for a specific date or date range. By default, those with the Performance Management Administration duty and Performance Management Implementation duty can run the batch process. To run the batch process, they use the Manage Eligibility Batch Process task in the Setup and Maintenance and Performance Management work areas.

#### How the Batch Process Works

The batch process evaluates the worker population for a selected date and matches workers with the performance documents for which they're eligible based on the eligibility profile criteria. The eligibility profiles used to determine eligibility for a performance document are those associated with the performance document period in the performance template. The batch process only analyzes the worker population to which the human resource (HR) administrator has data security access.

The batch process analyzes the worker population based on the worker assignment for the selected date. Workers with more than one assignment, for example, could be eligible for a different performance document for each assignment.

#### Filtering Performance Documents

You can set parameters to filter performance documents to process all those available for the current or a selected date, a specific document, or all documents of a selected type.

You can set filtering parameters to process:

- Performance documents that fall between the specified performance document start and end dates
- Specific performance documents
- All documents of a selected type that are active on the selected date

This table describes the parameter options available for the batch process.

Parameter	Description
Effective as of Date	<p>This required date determines:</p> <ul style="list-style-type: none"> <li>• Worker assignments on that date.</li> </ul>

Parameter	Description
	<ul style="list-style-type: none"> <li>When a performance document appears on the My Manager Evaluations and My Evaluations pages. When you enter a future date, the performance document won't appear until that date.</li> </ul> <p>For scheduled processes, select <b>Current Date</b> to use the system date every time the process runs.</p>
Document Type	Select a document type in this optional field to restrict the performance documents that appear in the Performance Document Name list to those of the selected document type.
Performance Document Name	<p>Select this optional parameter to specify a specific document to process and match to workers who meet the eligibility criteria. If you don't specify a document, you must select a date range, which matches workers to all documents with start and end dates within the selected range.</p> <p>The documents in this list have eligibility profiles associated with them, and fit within the date range in these Oracle Fusion Performance Management profile options:</p> <ul style="list-style-type: none"> <li><b>Number for future years from the current date</b></li> <li><b>Number of past years from the current date</b></li> </ul> <p>For example, if the profile options specify a range of three years--one past and two future--you see only documents ranging from the previous year to two in the future.</p>
Performance Document Start Date	If you don't specify a performance document, you must enter a start date. The process will include all performance documents that have a start date on or after the performance documents start date that's entered.
Performance Document End Date	Enter this optional parameter, along with the start date, to process all performance documents with start and end dates equal to or within the specified dates.

## When to Run the Batch Process

You can run the eligibility batch process on demand or schedule it to run at a later time or on a recurring interval.

Run the batch process, for example when:

- A new performance evaluation period begins
- Eligibility profiles are added to or removed from a performance document period
- An eligibility profile contains changes that are associated with a performance document period
- Worker status changes for criteria that are part of the eligibility profile, such as job, or location

## Process Flow Definitions



## Performance Process Flow Setup: Points to Consider

Set up the process flow to include the tasks, and their sequence, used by the performance template for performance evaluations. You can create as many templates as you need, and each template supports an evaluation type, such as annual or semiannual evaluation, project evaluation, and so on. Your decisions determine the:

- Tasks and subtasks to include
- Task sequence
- Task names

You manage process flows using the Manage Performance Process Flows task in the Setup and Maintenance or Performance Management work areas.

### Tasks and Subtasks

A process flow can contain up to 10 tasks. Some of the tasks contain subtasks. The following table shows the tasks, along with whether the task includes a subtask, which roles can perform the tasks, and a description of the task function.

Task	Subtask	Role that Performs Task	Task Function
Set Goals		Worker, manager, or both	<p>Add content to rate, such as competencies and performance goals, to the performance document. Include this task to let workers and managers determine the content the worker is evaluated on, and expectations for the worker, for example, at the beginning of an evaluation period. If this task isn't included, managers and workers can still add content in the Worker Self-Evaluation and Manager Evaluation of Worker tasks.</p> <p>This task is required if the Set Next Period Goals task is included in the process flow for the preceding evaluation period.</p>
Worker Self-Evaluation	Subtask 1: Track Worker Self-Evaluation  Subtask 2: Worker Self-Evaluation	Subtask 1: Manager  Subtask 2: Worker	<p>Worker evaluates self. Worker can also add content to be rated to the performance document. The manager:</p> <ul style="list-style-type: none"> <li>• Can track the worker self-evaluation to view any changes the worker makes to the performance document</li> <li>• Can't view the ratings and comments the worker provides until the worker completes the subtask</li> </ul>

Task	Subtask	Role that Performs Task	Task Function
Manager Evaluation of Worker		Manager	Manager evaluates worker. Manager can also add content to be rated to the performance document.
Manage Participant Feedback		Manager, worker, or both	Select participants to provide 360-degree feedback in a performance evaluation by providing ratings, comments, or both and completing questionnaires. Send requests to the participants, add questions to questionnaires, and track participant feedback to monitor the status of the request and feedback.
First Approval		Manager	First task for the approver to approve the performance document of the worker at one stage of the evaluation.
Second Approval		Manager	Second task for the approver to approve the performance document of the worker at a later stage of the evaluation.
Share Performance Document	Subtask 1: Share Performance Document  Subtask 2: Acknowledge Document	Subtask 1: Manager  Subtask 2: Worker	<p>The manager shares the document so that the worker can view the manager's ratings, and the worker acknowledges viewing the ratings.</p> <p>Managers can select to either:</p> <ul style="list-style-type: none"> <li>• Share and edit, to share the document with the worker while continuing to edit the document.</li> <li>• Share and release, the document to share the document with the worker but no longer edit it.</li> </ul> <p>The settings to determine whether the worker can view the manager ratings and comments are made when defining the performance template sections.</p>
Confirm Review Meeting Held	Subtask 1: Conduct Meeting  Subtask 2: Acknowledge Review Meeting	Subtask 1: Manager  Subtask 2: Worker	After the worker and manager meet to discuss the evaluation, the manager indicates that the meeting was conducted, then the worker acknowledges that the meeting took place.

Task	Subtask	Role that Performs Task	Task Function
Provide Final Feedback	Subtask 1: Worker Provides Final Feedback	Subtask 1: Worker	The worker, but not the manager, can provide final comments about the evaluation in the Worker Provides Final Feedback subtask. The manager, but not the worker, can provide final comments in the Manager Provides Final Feedback subtask.  The Include digital signature processing option is available to compel workers to verify that they're the people submitting the performance document. The option is available only in the Worker Provides Final Feedback subtask, so the task must be included in the process flow to activate it. If the option is selected, the signature is required from the worker.
	Subtask 2: Manager Provides Final Feedback	Subtask 2: Manager	
Set Next Period Goals		Manager, worker, or both  The roles are those specified for the Set Goals task for the performance document for the subsequent period.	Create the performance document for the period following the active performance document and add content to it, for example goals and competencies. This is the same task as the Set Goals task for the active performance document.

## Task Sequence

After you select the tasks to include as part of the process flow, you can change the task sequence. Some tasks are logical in sequence. For example, it's likely that you would place the Set Goals task before the Worker Self-Evaluation and Manager Evaluation of Worker tasks, and those before the First Approval task. However, you may decide not to use all of those tasks. Your enterprise may not require the Set Goals task, and let workers and managers add goals and competencies to the performance document as part of the evaluation tasks.

Other tasks have more flexibility. For example, you may want to schedule the Share Document task either before, or after, the First Approval task, depending on when you prefer to let workers see the manager ratings.

During the performance evaluation, all tasks must be completed by the role that performs the task before the next task can be started, even if the same role performs both tasks.

This rule doesn't apply to these tasks:

- Set Goals
- Set Next Period Goals
- Manage Participant Feedback
- Worker Self-Evaluation
- Evaluate Worker

The Set Goals task can be performed at the same times as the Manage Participant Feedback task, but must be completed before other tasks. The Set Next Period Goals task can also be performed at any time, as long as the performance document template for the subsequent period is available and the document can be created.

You can configure the process flow to allow workers to perform the Worker Self-Evaluation and managers the Evaluate Worker tasks concurrently. When you do so, managers and workers can perform their respective worker evaluation tasks simultaneously or at different times. To use concurrent Worker Self-Evaluation and Evaluate Worker tasks, select **Evaluation tasks can be performed concurrently** and consider the following:

- With the exception of two tasks, you must also specify the two tasks to be consecutive in the process flow so there are no tasks between them.
- The two tasks that can appear between the Worker Self-Evaluation and Evaluate Worker tasks are Manage Participant Feedback and Set Next Period Goals.
- When you configure the sequence, you must specify that one task or the other is completed first.
- No matter which task is designated as the first, either task can be started first.
- Managers and workers can provide ratings and comments, and add additional content to the performance document concurrently until they complete and submit the document.
- The task that is designated as the first must be completed first.
- When the role that performs the first worker evaluation task (typically the worker) submits the document after completing the task, the other role can see the ratings and comments provided by the other.
- Workers can perform the Manage Participant Feedback and Worker Self-Evaluation tasks concurrently, but only after the Set Goals task is complete, if it's part of the process flow.
- Managers can perform the Manage Participant feedback at the same time as the worker does the self-evaluation, or when performing the Evaluate Worker task.

## Task Names

You can configure the task and subtask names for both the manager and worker roles. The names you configure appear on the application pages. You must configure task names separately for each process flow you set up.

### Related Topics

- [Actions for Performance Document Approvals: Explained](#)

## Performance Process Flows: Examples

You create process flows that are referenced by performance templates to create specific evaluations. The following examples illustrate how to use process flows for some common review situations.

### Creating a Process Flow for an Annual Review

ABC Company has an annual evaluation for all employees. Company policy requires that:

- Employees and managers collaborate on adding content to the performance document.
- Both workers and managers also are required to rate the worker
- Managers are required to request and receive participant feedback from at least two sources to evaluate the worker as part of the 360-degree evaluation.

When the manager and worker completes the evaluation, company policy requires this sequence of events:

1. The manager must seek approval for the completed performance document.

2. Once the document is approved, managers must conduct a formal meeting with the worker to discuss the evaluation, which the worker must acknowledge.
3. After the meeting, the worker can comment on the performance evaluation or the process, which the manager can then rebut, if necessary.
4. Workers and managers can begin to set the content for the following period's evaluation.

ABC plans to change the default names of the tasks and subtasks to reflect the company nomenclature.

The tasks and subtasks in the following table constitute the process flow ABC Company creates for the performance template used to create the performance documents for their annual review.

Task Order	Default Task Name	New Task Name	Default Subtask Name	New Subtask Name	Roles
10	Set Goals	Set Competencies and Goals			Worker Manager
20	Worker Self-Evaluation		Subtask 1: Track Worker Self-Evaluation Subtask 2: Worker Self-Evaluation	Subtask 1: Track Employee Evaluation Subtask 2: Evaluate Yourself	Subtask 1: Manager Subtask 2: Worker
30	Manager Evaluates Worker	Evaluate Employee			Manager
40	Manage Participant Feedback	Request Feedback			Manager
50	First Approval	Approve Evaluation			Manager
60	Confirm Review Meeting Held		Subtask 1: Conduct Meeting Subtask 2: Worker Acknowledges Review Meeting	Subtask 1: Confirm Meeting Subtask 2: Acknowledge Meeting	Subtask 1: Manager Subtask 2: Worker
70	Provide Final Feedback		Subtask 1: Worker Provides Final Feedback Subtask 2: Manager Provides Final Feedback	Subtask 1: Provide Feedback to Manager Subtask 2: Provide Final Feedback	Subtask 1: Worker Subtask 2: Manager
80	Set Next Period Goals	Set Next Period Competencies and Goals			Worker Manager

## Creating a Process Flow for a Project Review

The company has a special project for a group of workers to deliver a new module within six months for their existing mobile application to beat a competitor. ABC Company wants to perform a simplified review of the workers who worked on this important project. The workers are also subject to the annual performance evaluation in a few months.

For the project review, the following applies:

- Managers provide all the goals and the reviews as part of the Manager Evaluates Worker task.
- Workers aren't required to provide any goals or perform a self-evaluation on the project so they can continue to concentrate on their work responsibilities.
- Manager evaluations must be approved.
- Managers must share the documents with the workers because the workers are required to acknowledge that they reviewed the manager ratings.
- No meetings are required, since those can be combined with the meetings following the annual review.
- ABC keeps the default names of the tasks and subtasks.

The following table shows the tasks, along with who performs them, and the order that is required to create the process flow.

Task Order	Task	Subtask	Roles
10	Manager Evaluates Worker		Manager
20	First Approval		Manager
30	Share Performance Document	Subtask 1: Share Performance Document Subtask 2: Worker Acknowledges Document	Subtask 1: Manager Subtask 2: Worker

## Participant Feedback Task Options: Points to Consider

You can include the Manage Participant Feedback task as part of the process flow to let participants evaluate workers by providing ratings and comments. Managers, workers, and participants can also supply feedback on a questionnaire as part of a multiparticipant evaluation. You can configure the Manage Participant Feedback task so that managers, workers, or both, can:

- Select participants
- Request feedback
- Add questions to the questionnaire
- Track participants

Configure process flows using the Manage Performance Process Flows task in the Setup and Maintenance and Performance Management work areas.

## Including the Manage Participant Feedback Task

When you include this task, you enable others, such as peers, colleagues, matrix managers and other managers to evaluate workers by providing ratings, comments, or both, on competencies, goals, and overall performance. You also allow the manager, worker, and invited participants to answer a questionnaire in the performance document to gather feedback to help the manager evaluate a worker. You create questionnaires using the template in the Questionnaires feature of the Oracle Fusion Profile Management business process, and add the questionnaire to the performance template as a section.

To include participant ratings, you add the participant roles to the Profile Content, Goals, and Overall Summary sections in the performance template. To gather feedback on a questionnaire, you add the participant roles to the Questionnaire section. You configure performance templates using the Manage Performance Templates task in the Setup and Maintenance and Performance Management work areas.

## Selecting Participants

You can specify whether managers, workers, or both, can select participants to provide ratings, comments, and questionnaire feedback. When using questionnaires, managers or workers select the participant role, which determines which questionnaire is available to the participant. Questionnaires are associated with particular roles in the performance template.

## Requesting Feedback

Managers can always request feedback by sending a request directly to a participant, who's notified by e-mail of the request. You can also specify whether to permit workers to request feedback directly to a participant without manager approval. If you don't select the **Worker can request feedback** option, the worker can still add a participant to the list of potential participants. However, when the worker sends the request, the manager receives notification that the worker has added a participant. The manager can then send the request directly to the participant if the manager supports the request. You manage participant feedback from the Manage Participant Feedback page, which you open from performance documents.

## Adding Questions to the Questionnaire

Specify whether to allow managers, workers, or both, to add questions they create to the questionnaire. The questionnaire must also be configured to allow managers and workers to add questions. They can add questions only to the section of the questionnaire that's configured to allow questions to be added.

## Tracking Participants

You can specify whether managers, workers, or both, can track the status of participant feedback to see whether a request was sent, the participants replied to the request, or they completed the feedback. The **Worker can view feedback before manager evaluation is visible** option determines when workers can view feedback in the performance document. If you don't select the option, a worker can see the participant feedback only after the Manager Evaluation task is shared with the worker.

## Concurrent Worker Evaluation Tasks: Explained

The manager and worker can evaluate the worker concurrently during the performance evaluation when the performance document is configured to allow it. With concurrent evaluations, managers and workers can perform their respective worker evaluation tasks simultaneously or at different times. In either case, the managers and workers can provide ratings and comments, and add additional content to the performance document until they complete and submit the document. This allows, for example, managers to start working on the evaluation before the workers complete it.

## Configuring Evaluation Tasks for Concurrent Evaluations

The performance document must be configured to allow concurrent evaluations to use the feature. Even though evaluations can be performed concurrently, the document is structured so the worker must complete the self-evaluation task first, or the manager must complete the evaluate worker task first. Typically, performance documents require the worker to complete the self-evaluation task first.

The human resource specialist configures the process flow to allow concurrent evaluations, and the task order, on the Manage Performance Process Flows page in the Setup and Maintenance work area.

## Adding, Removing, and Updating Content

Both the manager and worker can add goals and competencies to the performance document even while the other person is actively reviewing the worker. They can update goal details only when the other role isn't currently performing the evaluation task.

The following rules apply to removing content:

- The manager can remove content items during the evaluation, even if the worker has provided ratings or comments for them.
- Workers are restricted to removing content items that they added, and for which their managers haven't provided ratings or comments.
- Neither the worker nor the manager can remove content items when they're performing their respective evaluation tasks at the same time or after the manager submits the document.

## Viewing Added Competencies and Goals

When the worker or manager adds goals or competencies:

- They're available to the other role in the performance document immediately.
- The content is visible when the performance document is opened.
- If both the worker and manager are performing the evaluation tasks at the same time, they can see the added content when the section it was added to is refreshed.

For example, if a manager adds a goal to a performance document, the workers sees it when he selects the tab for the section containing goals. If the worker is already on the goals section, he must select another tab in the document, and return to the goals section to see the goal.

## Viewing Ratings and Comments

Ratings and comments aren't visible to the person who performs the final worker evaluation task until the other role submits the performance document. For example, if the worker is required to submit the performance document first, the manager can view the ratings and comments provided by the worker after the worker submits it. The manager ratings are visible to the worker after the manager submits the document, or when the manager shares the document, if the Share Performance Document task is available.

## Configuring Performance Approvals: Points to Consider

You can set up approvals for performance documents to include multiple approval tasks, and a hierarchy of approvers. When the manager or worker submits the document for approval, approvers receive notification that the document is ready for approval, and they can approve or reject the document in multiple locations.



## Configuring Approval Tasks in the Process Flow

To use approvals, you must configure the process flow to include an approval task. You set up process flows using the Manage Performance Process Flows task in the Setup and Maintenance work area. You can set up process flows to require one, two, or no approval tasks. If you include approval tasks, you can place them in whatever order your business process requires. For example, you might want to create a process flow with the First Approval task after the Manager Performs Worker Evaluation task, and the Second Approval after the Final Feedback task.

When each approval task is reached, the manager must submit the performance document for approval, even if the worker performs the task before the approval task. The document goes through the entire approval process so all required approvers must approve the document before the evaluation continues.

## Configuring Approval Hierarchy and Notifications

The predefined approval chain includes the manager of the manager of the worker being evaluated. However, you can add additional levels of approvers and other roles, such as HR specialist. Other roles must have the correct privilege for approvals and a data security profile that lets that includes access to the worker whose performance document they're asked to approve. You set up approvals and the associated notifications on the Manage Approval Rules and Notifications page. To add the HR specialist as an approver, you must also add an area of responsibility for the HR specialist using the Manage Areas of Responsibility task in the Person Management work area. Both pages are found in the Setup and Maintenance work area.

## Notifications

When you activate notifications, each approver receives worklist and e-mail notification that a document was submitted for approval. The notification contains a link to the performance document so the approver can view it. When all approvers have approved or rejected the document, the worker's manager receives notification whether the document was approved or rejected. The approval process is repeated if a manager resubmits a document after rejection, or a second approval task is configured in the process flow.

# Configuring Performance Documents to Display Performance Ratings to Workers: Critical Choices

You can configure a performance document to make performance ratings and comments available to workers at different points of a performance evaluation, or not at all. The availability of performance ratings and comments to workers depend on configurations you make to the:

- Process flow
- Sections in the performance template

## Configuring the Process Flow

The point at which performance ratings and comments are visible to workers depends on the inclusion and order in the process flow you configure for the following tasks:

- Manager Evaluation of Workers
- Share Performance Document
- Approval

You must include the Manager Evaluation of Workers task to add the sections in which managers can rate and provide comments on worker performance. Performance ratings and comments are available in three sections in the performance

document: Overall Summary (overall rating) Profile Content (competencies), and Goals. You configure process flows using the Manage Performance Process Flows task in the Setup and Maintenance work area.

The table shows when the ratings and comments are available to workers depending on the tasks you added to the process flow, and the order of the tasks.

Task Scenario	Impact
Share Performance Document is included in process flow	<p>If the Share Performance Document task is included in the process flow, workers can view performance ratings and comments when the manager clicks either of these buttons:</p> <ul style="list-style-type: none"> <li>• <b>Share and Retain</b></li> <li>• <b>Share and Release</b></li> </ul>
Approval and Manager Evaluation of Workers tasks are included in process flow; Share Performance Document task isn't included	<ul style="list-style-type: none"> <li>• If you place the Approval task after the Manager Evaluation of Workers task, workers can view performance ratings and comments when the task is completed.</li> <li>• If you place the Approval task before the Manager Evaluation of Workers task, workers can view performance ratings and comments when the Manager Evaluation of Workers task is completed.</li> </ul>
Manager Evaluation of Workers task is included in process flow; Share Performance Document and Approval tasks aren't included	Workers can view performance ratings and comments when the Manager Evaluation of Workers task is completed.

## Configuring Sections in the Performance Template

Add and configure the Overall Summary, Profile Content, and Goals sections in the performance template so managers share the ratings and comments and workers can access the sections. Consider the following:

- You can add any, or all of the sections when the Manager Evaluation of Workers task is included in the process flow.
- You configure the sections on the Structure tab of the performance template.
- You create and edit performance templates using the Manage Performance Templates task in the Setup and Maintenance work area.

On the Structure tab, for the section you are configuring, in the **Processing by Role** section, add a row and select **Manager**. In the **Manager** row, select **Yes** in the **Share Ratings** column to share ratings with the worker. Select **Yes** in the **Share Comments** columns to share comments. The default setting for both is **No**.

To make the section visible to the worker, add another row and select **Worker**. The **Share Ratings** and **Share Comments** settings refer to the manager being able to view ratings and comments provided by the worker. These are set to **Yes** and can't be changed.

## Performance Document Completion Status: How It Is Determined

You define the tasks and subtasks that are included in a performance document in the process flow. The process flow is used by a performance template to create performance documents. The status of tasks and subtasks determines the completion status of the entire performance document.


## Settings That Affect Performance Document Completion Status

Each task and subtask has a status. For example, the Set Goals task can be not started, in progress, or completed. When a task has subtasks, its status derives from the status of its subtasks. The status of a performance document derives from the status of all tasks in the document's process flow.

The following table shows the task statuses.

Task	Roles	Valid Statuses	Has Subtasks?
Set Goals	Worker	Not started	No
	Manager	In progress	
		Completed	
Worker Self-Evaluation	Worker	Not started	No
		In progress	
		Completed	
Manager Evaluation of Worker	Manager	Not started	No
		In progress	
		Completed	
Manage Participant Feedback	Worker	Not started	Yes
	Manager	In progress	
		Completed	
First Approval	Manager as Requester	Not started	No
		Approved	
Second Approval	Manager as Requester	Not started	No
		Approved	
Share Performance Document	Worker	Not started	Yes
	Manager	In progress	
		Completed	
Conduct Meeting	Worker	Not started	Yes
	Manager	In progress (visible only to the manager after sharing the document with the worker, before the worker acknowledges the meeting)	
		Completed	

Task	Roles	Valid Statuses	Has Subtasks?
Final Feedback	Worker	Not started	Yes
	Manager	In progress	
		Completed	
Set Next Period Goals	Worker	Not started	No
	Manager	In progress	
		Completed	

 **Note:** The Manage Participant Feedback Task can be performed concurrently with the Worker Self-Evaluation and Manager Evaluation of Worker tasks. It's completed when the manager submits the performance document or locks the feedback to prevent any participants from providing additional feedback. The application permits the Manage Participation Feedback task to be completed whether or not any participants submitted feedback.

In addition, two statuses appear for tasks in the performance evaluation business process that don't factor in the completion status calculation:

- Ready indicates that the task is ready to be started and the status of the previous task in the process flow is Completed. Not Started, by contrast, indicates the task hasn't been started and isn't ready to be started as the status of the previous status isn't Completed.
- Missing indicates that a performance document hasn't been created. This status doesn't really exist in the same way as other performance document statuses; it appears in the analytic Task Completion Status.

For subtasks, the status changes from Not started to In progress when the person performing the subtask saves a performance document. When that person submits the performance document, or uses an equivalent action, such as sharing or acknowledging the performance document, the subtask status changes to Completed. The following table shows a summary of the possible subtask statuses.

Task	Subtask	Roles	Valid Statuses
Share Performance Document	Share Performance Document	Manager	Not started
			In progress
			Completed
Share Performance Document	Share Performance Document	Worker	Not started
			Completed
Conduct Meeting	Confirm Review Meeting Held	Manager	Not started
			Completed
Conduct Meeting	Confirm Review Meeting Held	Worker	Not started
			Completed

Task	Subtask	Roles	Valid Statuses
Final Feedback	Provide Final Feedback	Worker	Not started
			In progress
			Completed
Final Feedback	Provide Final Feedback	Manager	Not started
			In progress
			Completed

## How Completion Status Is Calculated

The performance document status is derived from the task status, which is derived from the status of any subtasks within the task. For tasks that have subtasks, the status is Completed when all the subtasks within the task are completed.

The performance document statuses and the condition leading to each status for all available tasks are shown in the following table.

Document Status	What the Status Means
Not started	No tasks are started
In progress	At least one of the following tasks are in progress or completed: Set Goals, Worker Self-Evaluation, Manager Evaluation of Worker, Manage Participant Feedback
Submitted	Manager submitted the performance document for approval
Approved	Approver approved the performance document
Document shared with worker	Manager completed the Share Performance Document subtask
Document acknowledged	Worker completed the Share Performance Document subtask
Review meeting held	Manager completed the Confirm Review Meeting Held subtask
Review meeting acknowledged	Worker completed the Confirm Review Meeting Held subtask
Worker final feedback provided	Worker submitted final feedback
Manager final feedback provided	Manager submitted final feedback
Completed	All tasks and subtasks are completed, excluding Set Next Period Goals
Canceled	Human Resource (HR) specialist or the manager canceled the performance document

On the My Organization page, you can see the number of documents where a task (for example, Set Goals) is in a particular status (for example, Completed) expressed as a percentage of the number of performance documents for a population.

## Relationship of Subtask Status to Task Status for One Subtask

If the process flow includes a task that has subtasks but only one subtask is configured, then the task status is the same as the subtask status.

## Relationship of Subtask Status to Task Status for Two Subtasks

The process flow definition includes the Final Feedback task. Both subtasks are configured: Worker Final Feedback and Manager Final Feedback. The Manager Final Feedback subtask can't begin until the Worker Final Feedback task is completed.

Subtask Status: Worker Final Feedback	Subtask Status: Manager Final Feedback	Task Status: Final Feedback
Not started	Not started	Not started
In progress	Not started	In progress
Completed	Not started	In progress
Completed	In progress	In progress
Completed	Completed	Completed

# Performance Template Sections

## Performance Template Section: Critical Choices

You must create a section for each task that requires a section used in the process flow. You create sections using the Manage Performance Template Sections task in the Setup and Maintenance work area.

To create a section, you must specify the section type, and depending on the section type, also specify:

- Whether the section is rated or weighted
- Which calculation method to use to determine worker ratings, if using calculated ratings
- Which rating model to use to rate workers
- Content item processing options
- Content items to include

Once created, the sections are available for you to use in the performance template. In the performance template, you can create sections or select and edit previously-created sections.

## Section Types

The section types are:

- Profile Content, to rate worker competencies
- Goals, to rate worker goals
- Questionnaire, to allow managers, workers, and participants to provide feedback about the worker
- Overall Summary, to provide the overall rating of the worker
- Worker Final Feedback
- Manager Final Feedback

You must define a section for the tasks that appear in the process flow that require a section. Each section appears as a tabbed page in the performance document. Only one section of each type can appear in a performance document. The tasks that require a section, and the sections they require, appear in the following table.

Task	Required Section
Set Goals	At least one of:
Set Next Period Goals	<ul style="list-style-type: none"> <li>• Profile Content</li> <li>• Goals</li> </ul>
Worker Self-Evaluation	At least one of:
Manager Evaluations of Workers	<ul style="list-style-type: none"> <li>• Profile Content</li> <li>• Goals</li> <li>• Overall Summary</li> </ul>
Manage Participant Feedback	At least one of:
	<ul style="list-style-type: none"> <li>• Profile Content</li> <li>• Goals</li> <li>• Overall Summary</li> <li>• Questionnaire</li> </ul>
Worker Provides Final Feedback	Worker Final Feedback
Manager Provides Final Feedback	Manager Final Feedback

## Section Ratings and Weighting

For the Profile Content, Goals, and Overall Summary sections, you can select whether to enable section ratings, comments, or both. When you enable section ratings and comments, managers, workers, and participants can select a rating for the section and provide comments. For the Profile Content and Goals sections, they can rate the section separately from the individual content items contained within the section. For the Profile Content section, the content items are competencies. The Goals section contains performance goal items.

Managers, workers, participants, and matrix managers can use the calculated ratings as a guide to manually select their ratings. For Profile Content and Goals sections, the application calculates ratings based on ratings on individual items in the section. For the Overall Summary section, the application calculates ratings using the Profile Content and Goals section ratings.

You can select to weight a section, or items, in a section to place more or less importance on the section or item. The application can use the weights to calculate section and overall ratings.

## Calculation Rules

You can have the application calculate the employee's performance rating in addition to having workers and managers manually enter ratings in these sections:

- Overall Summary
- Profile Content
- Goals

For the Overall Summary section, the calculation rule you select is used to determine overall ratings for performance based on the calculations for the Profile Content and Goals sections. Select one of the following calculation methods for the sections:

- Average
- Sum
- Band
- Fast formula


For the calculation rules, you must also specify the:

- Fast formula (if used)
- Decimal places
- Decimal rounding rule
- Mapping metric
- Mapping method

## Rating Models

In the Overall Summary, Profile Content, and Goals sections, you use rating models to rate the workers. You set up rating models in the profile management business process using the Manage Profile Rating Models task in the Setup and Maintenance work area. If you use a particular rating model to rate the items in a section, you can either:


- Use the same rating model to rate the section itself
- Select a different model to rate the section

 **Note:** For the Overall Summary section, you must select the default Profile Option rating model for the overall ratings to appear where performance ratings are compared between workers, or between a worker's past and present ratings, except for the My Organization page. The ratings that appear on the My Organization page are taken from the performance document that the manager selects to view, and may not use the profile option rating model.

## Content Item Processing

For the Profile Content and Goals sections, you select the ratings and calculation rules to use to determine rating scores for the content items, goals and competencies, if your organization uses calculated ratings. If you use performance rating types for the section, you can select different rating models to rate individual items in the section. The calculation rules are applied to each item, then combined using the calculation rule you selected for the section to determine the section rating. To use this feature for the Profile Content section, you must select the **Proficiency and performance**, or **Performance** rating type. For the Goals section, the **Performance** rating type applies automatically. Only items added directly to the template are eligible for separate rating models. Items added to the performance document by managers or workers use the performance rating model specified for the section.



 **Note:** For the Profile Content section, to update the worker's person profile with a proficiency level rating, you must select a rating type that uses a proficiency rating model. Select one of these rating types:

- **Proficiency**
- **Proficiency and performance**

## Section Content

In the Section Content section, you specify the source of content items. You can also designate additional items to appear in the section.

## Information Sources for Profile Content Section

For the Profile Content section, you can specify competencies to be delivered from either the model profile related to the worker's job data, or another specific profile that you select. Profiles are maintained in profile management business process. The available model profiles those associated with the following workforce structures: Position, Organization, Job, or Job Family. When you create the performance template, you can pull the items from the selected profile into it. Workers and managers can also pull updated profile content into the performance document by using the update action to receive any content changes made between the time the performance document was created or last updated and rating the content.

## Writing Assistant

In the Profile Content section, you can select **Enable the writing assistant for manager** to assist managers in writing useful comments about worker competencies in the performance document. The writing assistant feature provides suggestions for comments that are associated with competencies and their correlated proficiency levels.

## Information Source for Goals Section

For the Goals section, you can select **Populate with Worker Goals** to add goals from goal plans in the goal management business process to the performance document. When managers or workers edit the worker's existing goals in the goal management business process, the changes are reflected in the performance document when it's opened. To copy new goals into the performance document from the goal management business process they must use the Update Goals and Competencies action in the performance document.

## Content Items

You can add content items to the Profile Content and Goals sections. In the template, you have the option to pull these content items into the template when you add the section to it. The content items in the template appear in the performance documents created from the template.

### *Related Topics*

- [Profile Types: Explained](#)

## Calculated Ratings: Explained

You can set up calculated ratings to automatically calculate ratings in performance documents. The application can calculate the overall performance rating in the Overall Summary section, and section ratings in the Profile Content and Goals sections.

The calculated rating derives from a score calculated from ratings provided by workers, managers, and participants using the calculation rules defined in the sections. The application maps the calculated score to the actual calculated rating based on the rating model used for the section.

In the performance template and performance template section, you can set up performance documents to:

- Calculate and display the ratings provided by workers, managers, matrix managers, and other participants.
- Display calculated ratings along with, or instead of, manual ratings.
- Use the provided calculation rules or custom fast formulas to calculate ratings.

## Where Calculated Ratings Appear

Calculated ratings appear at the top of the section for which they apply. To view calculated ratings, all roles must click the calculator icon that appears at the top of the section. Everybody who rates the worker can see their own calculated ratings, if configured to do so. Managers and matrix managers can view calculated ratings provided by the worker and participants.

The calculated rating appears as stars when star ratings are configured. The rating level description for the calculated rating appears when star ratings are not configured. In both cases the calculated score appears in parentheses after the ratings. The calculated rating is rounded to the closest rating level value as determined by the rounding and mapping settings.

## Calculated Ratings and Compensation Management

Calculated overall ratings, along with overall ratings provided by managers, can be used by Oracle Fusion Compensation Management. The settings to determine whether they appear there are available in the Compensation Management business process. The calculated ratings that appear in Compensation Management are the calculated scores.

## Calculated Ratings Roll Up

You can set up the template so that any or all of the sections use calculated ratings. When you enable calculated ratings in the Profile Content or Goals sections, the application:

- Uses the ratings that managers, workers, and matrix managers and other participants provide on individual items in the section
- Performs roll-up calculations to determine the rating for the respective section automatically
- Uses the calculated ratings for the Profile Content and Goals sections to determine the overall calculated rating in the Overall Summary section

## Using Fast Formulas in Performance Documents: Explained

You can configure fast formulas to calculate section ratings for workers in a performance document. Fast formulas calculate ratings based on ratings provided by workers, managers, matrix managers and other participants for items in the performance document.

## Fast Formulas and Database Items

Fast formulas contain the items and rules used to calculate the section rating, and can be based on ratings provided on the items by workers, managers, and participants. You create the fast formulas using the Performance Rating Calculation type. To the fast formula you add Database Items (DBI). These items can calculate ratings on attributes besides the overall item rating. For example, you can use DBIs to rate other attributes on a goal, such as the measurement attributes, rather than the overall goal. You create fast formulas using the Manage Fast Formulas task in the Setup and Maintenance work area.

## Calculated Rating Setup in the Performance Template Section and Performance Template

You configure the sections of the performance document to use fast formulas. Fast formulas can calculate ratings for the Overall Summary, Profile Content (Competencies), and Goals sections. You can set up any, or all, these sections in a performance document to calculate ratings.

In the section, you must select the Fast Formula calculation rule. In addition, you select the fast formula rule. To use calculated ratings, you must also select the option to use calculated ratings on the Process tab of the performance template. You also must select which roles can see calculated ratings.

## Setting Up Calculated Ratings in Performance Templates and Sections: Points to Consider

You can use calculated ratings to automatically calculate a worker's overall performance rating in the Overall Summary section, and section ratings in the Profile Content and Goals sections. To configure calculated ratings, you select from the following options:

- Calculated ratings activation and display options
- Section rating model and calculation rules
- Decimal places
- Decimal rounding rule
- Mapping metric
- Mapping method

You configure calculated ratings for the template on the Process and Structure tabs of the performance template. You manage templates using the Manage Performance Templates task in the Setup and Maintenance work area. You can also configure sections using the Manage Performance Template Sections task in the Setup and Maintenance work area.

### Calculated Ratings Activation and Display Options

On the Process tab of the performance template, select **Calculate ratings** to enable the application to calculate section ratings. When you select this option, all sections for which ratings are enabled, use calculated ratings. The overall summary rating is always calculated using the calculated section ratings, not the manually entered section ratings.

You select from the following options to display the ratings, which apply to all sections:

- **Display calculated ratings to worker**
- **Display calculated ratings to manager**
- **Display calculated ratings to participants**
- **Display calculated ratings to matrix managers**

Calculated ratings of matrix managers and other participants display to both managers and workers if they're allowed to see manually entered ratings.

If you select **Use calculated ratings only**, the following applies:

- Only calculated ratings appear and managers, workers and participants can't enter ratings manually
- Calculated ratings become the official section ratings

## Section Rating Model and Calculation Rules

To enable calculated ratings in a section, you must select a rating model for the section.

In addition, you must select the type of calculation rules to use for rating the section. The options are: **Fast formula**, **Average**, **Sum**, and **Band**. You can specify the calculation rules either using the Manage Performance Template Sections task, or on the Structure tab of the performance template.

You can select different calculation rules for each section within a performance template. The application uses the calculation rules for the Overall Summary section to determine the calculated overall rating.

For the Average, Sum, and Band methods you can weight sections and items within the sections. Weights let you place more or less importance on particular sections and items.

## Decimal Places

You can select the number of decimal places, up to a maximum of two, that appear in the performance document or Compensation Management pages for the calculated rating. The default value is 2.

## Decimal Rounding Rule

In the performance section, you select the rounding rules to determine how the calculated rating is rounded to the final value. The rounding is applied to the rounding decimal, which is the last decimal set in the Decimal Places field. For example, if you set the Decimal Places value at **2**, the rounding is applied to the second decimal. The default value is **Standard**.

The table shows the available rounding rules, the effects of selecting each rule, and examples of how the rules are used to determine calculated ratings

Rounding Rule	Effect	Example
<b>Standard</b>	Rounds up when the rounding decimal is 5 or greater, and down when the rounding decimal is 4 or less.	If the calculated rating is 3.4867, and the decimal place setting is 2, the final calculated rating is 3.49. If the calculated rating is 3.4849, and the decimal places setting is 2, the final calculated rating is 3.48.
<b>Up</b>	The value always rounds up.	If the calculated rating is 3.4940 or 3.4960 and the decimal place setting is 2, the final calculated rating is 3.50. If the calculated rating is 3.49 and the decimal place setting is 2, the final calculated rating is 3.50
<b>Down</b>	The value always rounds down.	If the calculated rating is 3.4940 or 3.4960 and the decimal place setting is 2, the final calculated rating is 3.49.

## Mapping Metric

The mapping metric determines how to map the calculated numeric score to a rating level in the rating model. You can select either of these attributes of the rating model to map the calculated score of the section to the rating level:

- Numeric rating - Maps the calculated numeric score to the single-value numeric rating, and the corresponding rating level. Numeric rating is the default for the Average and Fast formula calculation rules for the section.
- Points range - Maps the calculated numeric score to the points range and the corresponding rating level. Points range is the default for the Band calculation rule for the section.

## Mapping Method

The mapping method determines the rating when no exact match exists between the calculated rating and a rating level from the rating model used in the section. When rounding rules are used, the calculated rating value is taken after the rounding rule is applied.

The table shows the available mapping methods and the effects of selecting each one.

Mapping Method	Effect for Numeric Rating Mapping Metric	Effect for Points Range Mapping Metric
<b>Highest</b>	Uses the next numeric rating greater than the calculated average.	Uses the next review point greater than the calculated average.
<b>Lowest</b>	Uses the next numeric rating less than the calculated average.	Uses the next review point less than the calculated average.
<b>Nearest</b>	Uses the numeric rating closest to the calculated average.	Uses the review point closest to the calculated average.

Using the numeric rating for metric mapping, for example, assume the rating model has the following entries for numeric rating and short description:

- 1--Weak
- 2--Poor
- 3--Average
- 4--Good
- 5--Excellent

If the application calculates a rating of 3.2 (between Good and Average, but closer to Average), the mapping method tells the application which entry to pick:

- Highest yields the next numerically highest rating--in this case 4, or Good.
- Lowest yields the next numerically lowest rating--in this case 3, or Average.
- Nearest yields the numerically closest rating--in this case 3, or Average.

If the calculated rating falls exactly halfway between two ratings in the rating model, the application assigns the numerically higher of the two ratings.

## Performance Template Section Calculation Rules: Critical Choices

To use calculated ratings, you must select the type of calculation rules to use for rating Profile Content, Goals, and Overall Summary performance template sections. You can change the calculation rule for the section selected in the performance template where the section is used. The options are:

- Average
- Sum
- Band
- Fast Formula

Each of these settings has a default mapping metric to help determine the final numeric level to assign to the rating. However, you can change the mapping metric from the default to another. The mapping metric options are:

- Numeric rating
- Points range

To use numeric ratings, the rating model configured to rate the section and items in the section must have the numeric rating attributes defined for the rating levels. To use the points range, the rating model must have defined review points as well as point ranges (from points and to points).

## Average Method

To use this method, the rating models associated with the section and its content items must define numeric ratings that correspond to the rating descriptions. The application first calculates the average of the item ratings to determine the section rating. Then the application calculates the average of the section ratings to determine the overall rating. The application uses the numeric ratings to calculate a weighted average if weights are configured to be used; otherwise, it calculates a straight average. It then converts this average back to a performance document rating, using the rating model.

For the points range mapping metric, the application:

- Calculates the total numeric score using the numeric ratings defined in the rating model
- Converts this total into the corresponding review rating for the section by mapping the total numeric score to the points range

## Sum Method

To use this method, the rating models associated with the section and the items in the section must also use numeric ratings. The application:

- Uses the numeric ratings as defined in the rating model
- Calculates the total numeric score
- Converts this total into the corresponding review rating for the section by mapping the total numeric score to a rating level
- Ignores items without ratings

When using the sum method for the overall rating, section rating calculation rules can be sum or average only.

For points range metric mapping, the application:

- Uses the numeric ratings as defined in the rating model
- Calculates the total numeric score
- Converts this total into the corresponding review rating for the section by mapping the total numeric score to the points range
- Ignores items without ratings

## Band Method

This method is similar to the sum method, but is available only for the Overall Summary section of a performance document. The Profile Content and Goals sections, however, use the average or sum method. To use the band method, the rating model that is associated with the Overall Summary section must define review points as well as point ranges (from points and to points).

During the calculation process, the application:

- Calculates the total numeric score across all sections

- Maps this total into the equivalent rating level using the points range

For numeric rating metric mapping, the application:

- Calculates the total numeric score across all sections
- Converts this total into the corresponding review rating for the section by mapping the total numeric score to a rating level

## Fast Formula Method

Fast formulas are custom formulas you create from Performance database items. By default, these use numeric ratings metric mapping. For numeric ratings, the application:

- Calculates the total numeric score based on the fast formula
- Maps the score to the rating level

For the points range mapping metric, the application:

- Calculates the total numeric score based on the fast formula
- Maps this total into the equivalent rating level using the points range

You can't configure weights to be used with a fast formula. However, you can build weights into the fast formula.

## Item Processing in a Performance Template Section: Critical Choices

When you enable content items for a section, you specify the:

- Rating type
- Item calculation
- Properties

You configure item processing on a section using the Manage Performance Template Sections task in the Setup and Maintenance or the Performance Management work areas.

### Rating Type

Rating types determine the rating models that are available for workers and managers to use to select the content item ratings in the performance document and to calculate the item ratings.

For Profile Content sections, the available rating types are:

- Proficiency: Workers and managers can select the proficiency level for items on the performance document. The rating model and descriptions used to rate the item are those set in the content library for the item.
- Performance: Workers and managers can select the performance rating on the performance document.
- Proficiency and Performance: Workers and managers can select both a proficiency level and a performance rating on the performance document.

For Goals sections, only the Performance rating type is available.

When you select either Performance or Proficiency and Performance rating types, you can use the same rating model for content items that the section uses, or select another. You can also select different performance rating models for individual content items. This enables your organization to rate some goals that may be specific to a department using a different rating model than that used for organization-wide goals, for example.

Proficiency levels are published to Oracle Fusion Profile Management when the performance document is completed. Performance ratings for competencies and goals aren't published to Profile Management.

## Item Calculation

The item calculation method determines how the item is rated.

When the rating type is Proficiency and Performance, you can select:

- **Proficiency:** Proficiency ratings are used to calculate the score for a specific item.
- **Performance:** Performance ratings are used to calculate the score for a specific item.
- **Proficiency multiplied by performance:** The application multiplies the proficiency point value by the performance point value to calculate the score for a specific item.

When the rating type is either Proficiency or Performance, the default values for the item calculation method are the same and can't be changed.

## Properties

You can select the attributes that you want to make available for items.

The effects of selecting the properties are shown in the table.

Property	Effect
<b>Target Proficiency Level</b>	Target proficiency levels appear for the items in the performance document. The target proficiency level that appears is the target proficiency level for the item from the most specific profile type used for the section, if one exists. For example, assume you select job profile as the profile type used by the section. The target proficiency levels in the performance document are those for the competencies belonging to the worker's job profile.
<b>Target Performance Rating</b>	You can select target performance ratings for the items you add to the section or the performance template. In the performance document, workers can select target performance ratings for items they add to the document, and managers can select target performance ratings for items that they, or the workers, add.
<b>Weight</b>	You can enter weights for items in the section and the performance template to determine the relative importance of the items within the section. In the performance document, managers and workers can change weights for the items they add to the document, or goals added from Oracle Fusion Goal Management. When using calculated ratings, this is available only when you select the Average calculation rule for the section.
<b>Minimum Weight</b>	You can enter minimum weights for items in the performance template. In the performance document, managers can edit the minimum weights.
<b>Required</b>	In the performance template section or the performance template, select the <b>Required</b> check box to prevent workers and managers from editing or deleting the item in the performance document. Use the Required setting to create a performance template that contains standard competencies and goals, for example, to rate workers on the competencies for a particular job profile type.



## Performance Ratings Using the Average Method: How They Are Calculated

The application can calculate ratings for each section and the overall rating using the average calculation rule. You can use the average rule to calculate ratings using various rating models and apply weighting, when weighting is selected. You select calculation rules for sections using the Manage Performance Template Sections task in the Setup and Maintenance or Performance Management work areas.

### Settings That Affect Average Rating Calculations

The factors that determine average rating calculations are the:

- Rating models that are selected for each section and content item
- Weighting, which is optional, and can vary between sections and content items

### How Performance Ratings Are Calculated

In the average method, the application first calculates the average of the content item ratings to work out the section rating. The application then calculates the average of the section ratings to determine the overall rating. The application calculates ratings using precise values throughout the calculation process, and applies rounding at the end. Rounded values can appear in the performance document for the sections and overall ratings. The number of decimals displayed is determined in the performance template section.

### Example: Average Method Without Weighting

ABC Company uses the same rating model for the Competencies, Goals, and Overall Summary sections, with no weighting. The rating model has five levels in the scale, and the numeric values are 1, 2, 3, 4 and 5. Assume that all content items use the same rating model. The performance template is set up to use the standard rounding rule, and the overall rating is set to display to two decimal places. The mapping method is Nearest.

Assume the following performance template section configurations:

- Decimal rounding rule is Standard
- Decimal display is 2
- Mapping metric is Numeric Rating
- Mapping method is Nearest

The following table shows the ratings for the Competencies section.

Competency	Item Numeric Rating	Maximum Numeric Rating from Rating Model	Decimal Score (Item Rating/Maximum Rating)
Teamwork	4	5	0.8
Leadership	3	5	0.6
Communication	2	5	0.4
Analytical Skills	4	5	0.8

Competency	Item Numeric Rating	Maximum Numeric Rating from Rating Model	Decimal Score (Item Rating / Maximum Rating)
Ethics	5	5	1.0
Conceptual Thinking	4	5	0.8

The sum of the decimal scores is 4.4, from a possible maximum of 6.0. The 4.4 must be converted to a value on the rating model for the section. The section maximum numeric rating is 5, so the formula to calculate the section rating is:

(Total Decimal Score) / (Total Maximum Decimal Score) x (Maximum Numeric Rating from Section Rating Model), or in this example:  $(4.4 / 6) \times 5 = 3.67$ .

In this example the calculated section rating for competencies is 3.67 out of 5, which maps to a numeric rating of 4.

The following table shows the ratings for the Goals section.

Goal	Item Numeric Rating	Maximum Numeric Rating from Rating Model	Decimal Score (Item Rating / Maximum Rating)
Increase sales revenue	5	5	1.0
Cut expenses	3	5	0.6
Grow business in Asia	5	5	1.0
Participate in mentoring	5	5	1.0

The sum of the decimal scores is 3.6, from a possible maximum of 4.0. The 3.6 must be converted to a value on the rating model for the section, just as for the Competencies section. The section maximum numeric rating is 5, so using the same formula to calculate the section rating as for competencies, the section rating is:  $(3.6 / 4) \times 5 = 4.5$ .

In this example the calculated section rating for goals is 4.5 out of 5, which maps to a numeric rating of 5.

To determine the overall rating, the application calculates the average numeric rating for the two sections. The overall rating calculation is:  $(4.0 + 5.0) / 2 = 4.5$ . The calculated overall rating maps to a numeric rating of 5.

## Example: Average Method with Weighting

The following year, ABC Company uses the same rating model for the Competencies, Goals, and Overall Summary sections as in the previous example, but applies weights to the sections and individual content items. The weights determine the relative value of one section compared to another section, or content items to one another. Any content items that don't have weights are ignored in the calculations. The application validates that the:

- Sum of the weights for content items within a section is 100.
- Sum of the sections that contain content items (that is, the Competencies and Goals sections) within a performance document is also 100.

The following table shows the ratings for the Competencies section.

Competency	Item Numeric Rating	Maximum Numeric Rating from Rating Model	Decimal Score (Item Rating / Maximum Rating)	Weight	Weighted Score (Decimal Score x Weight)
Teamwork	4	5	0.8	35	28.0
Leadership	3	5	0.6	5	3.0
Communication	2	5	0.4	10	4.0
Analytical Skills	4	5	0.8	20	16.0
Ethics	5	5	1.0	10	10.0
Conceptual Thinking	4	5	0.8	20	16.0

The sum of the weighted scores is 77.0, from a possible maximum of 100.0. The 77.0 must be converted to a value on the rating model for the section. The section maximum numeric rating is 5, so the formula to calculate the section rating is:

(Weighted Score) / (Total Maximum Weighted Score) x (Maximum Numeric Rating from Section Rating Model), or in this example:  $(77.0 / 100.0) \times 5 = 3.85$ .

In this example the calculated section rating for competencies is 3.85 out of 5, which maps to a numeric rating of 4.

The following table shows the ratings for the Goals section.

Goal	Item Numeric Rating	Maximum Numeric Rating from Rating Model	Decimal Score (Item Rating / Maximum Rating)	Weight	Weighted Score (Decimal Score x Weight)
Increase sales revenue	5	5	1.0	30	30.0
Cut expenses	3	5	0.6	30	18.0
Grow business in Asia	5	5	1.0	25	25.0
Participate in mentoring	5	5	1.0	15	15.0

The sum of the weighted scores is 88.0, from a possible maximum of 100.0. The 88.0 must be converted to a value on the rating model for the section, just as for the Competencies section. The section maximum numeric rating is 5, so using the same formula to calculate the section rating as for competencies, the section rating is:  $(88.0 / 100.0) \times 5 = 4.40$ .

In this example the calculated section rating for goals is 4.40 out of 5, which maps to a numeric rating of 4.

To determine the overall rating, the application calculates the sum of the numeric ratings for the two weighted sections, then converts the score to the rating model scale. ABC sets the Competencies section weight to 40, and the Goals section weight to 60. First, the application calculates the decimal scores of the weighted sections:

- Competencies:  $4 / 5 = 0.8$
- Goals:  $4 / 5 = 0.8$

The application then calculates the weighted scores for each section, and adds them together. The total weighted scores are out of a possible 100.0 points:

- Competencies:  $0.8 \times 40 = 32.0$
- Goals:  $0.8 \times 60 = 48.0$
- Total Competencies and Goals:  $32.0 + 48.0 = 80.0$

The application converts the scores to the rating model scale to determine the overall rating:  $(80.0 / 100.0) \times 5 = 4.0$ , which maps to a numeric rating of 4.

## Example: Average Method with Weighting and Rating Model Variations

For a performance evaluation for a specific project, ABC Company uses various rating models for the Competencies, Goals, and Overall Summary sections. The application applies the maximum numeric rating from each rating model to calculate the scores. Different weights are also applied to the content items. Section weights are also applied. The performance template is set up to use the standard rounding rule, and the overall rating is set to display to two decimal places. The mapping method is Nearest.

Assume the following performance template section configurations:

- Section weights are applied
- Different weights are applied to the content items
- Decimal rounding rule is Standard
- Decimal display is 2
- Mapping metric is Numeric Rating
- Mapping method is Nearest

The following table shows the ratings for the Competencies section, which uses different rating models with different maximum ratings for the individual competencies. The section rating model differs from those used for the individual competencies, and the rating model maximum numeric rating is 7.

Competency	Item Numeric Rating	Maximum Numeric Rating from Rating Model	Decimal Score (Item Rating / Maximum Rating)	Weight	Weighted Score (Decimal Score x Weight)
Teamwork	4	5	0.8	35	28.0
Leadership	3	3	1.0	5	5.0
Communication	2	4	0.5	10	5.0
Analytical Skills	4	5	0.8	20	16.0
Ethics	5	5	1.0	10	10.0

Competency	Item Numeric Rating	Maximum Numeric Rating from Rating Model	Decimal Score (Item Rating / Maximum Rating)	Weight	Weighted Score (Decimal Score x Weight)
Conceptual Thinking	4	4	1.0	20	16.0

The sum of the weighted scores is 84.0, from a possible maximum of 100.0. The 84.0 must be converted to a value on the rating model for the section. The section maximum numeric rating is 7, so the formula to calculate the section rating is:

(Weighted Score) / (Total Maximum Weighted Score) x (Maximum Numeric Rating from Section Rating Model), or in this example:  $(84.0 / 100.0) \times 7 = 5.88$ .

In this example the calculated section rating for competencies is 5.88 out of 7, which maps to the numeric rating 6.

The following table shows the ratings for the Goals section. The Goals section itself uses a rating model with a maximum rating of 6.

Goal	Item Numeric Rating	Maximum Numeric Rating from Rating Model	Decimal Score (Item Rating / Maximum Rating)	Weight	Weighted Score (Decimal Score x Weight)
Increase sales revenue	5	5	1.00	30	30.0
Cut expenses	3	5	0.60	30	18.0
Grow business in Asia	4	5	0.80	25	20.0
Participate in mentoring	4	5	0.80	15	10.0

The sum of the weighted scores is 78.0, from a possible maximum of 100.0. Because the maximum for the section rating model is 6, the section rating is:  $(78.0 / 100.0) \times 6 = 4.68$ , which maps to the numeric rating of 5.

To determine the overall rating, the application calculates the sum of the numeric ratings for the two weighted sections, then converts the score to the rating model scale. ABC sets the Competencies section weight to 40, and the Goals section weight to 60. The overall summary section uses a rating model with a maximum score of 9.

First, the application calculates the decimal scores of the weighted sections:

- Competencies:  $6 / 7 = 0.85$
- Goals:  $5 / 6 = 0.83$

The application then calculates the weighted scores for each section, then adds them together. The section weight for the Competencies section is 40, and for the Goals section it's 60. The total weighted scores are out of a possible 100.0 points:

- Competencies:  $0.85 \times 40 = 34.0$
- Goals:  $0.83 \times 60 = 49.8$
- Total Competencies and Goals:  $34.0 + 49.8 = 83.8$

The application converts the scores to the rating model scale to determine the overall rating:  $(83.8 / 100.0) \times 9 = 7.542$ . When the rounding rules and decimal places are applied, overall rating is 7.54, which maps to the section numeric rating 8.

## Performance Ratings Using the Sum and Band Methods: How They Are Calculated

The application can calculate ratings for each section and the overall rating using the sum method. You can use the sum method to calculate ratings using any rating model. You can also use it to calculate the overall rating when either the Profile Content or Goals section uses the average method, and the other uses the sum method. Weights, however, aren't used in a section, or for calculating the overall rating, when using the sum method.

### Settings That Affect Sum and Band Rating Calculations

The factors that determine sum and band rating calculations are the:

- Rating models that are selected for each section and content item
- Numeric ratings and points ranges assigned to each rating level

Items without ratings aren't counted when calculating the ratings. For the band method, the numeric ratings must be associated with a points range. The rounding rules, mapping metric, and mapping methods must also be set in the performance template sections.

### How Performance Ratings Are Calculated

In the sum method, the section rating is the sum of the numeric rating from the rating level for each content item. The overall rating is the sum of the numeric ratings for the section ratings.

For the band method, as in the sum method, the application calculates the sum of the section rating. For the overall rating, the application converts the numeric rating total from the sections to the points range associated with a rating level.

### Example 1: Sum Method with Sum Sections

ABC Company uses the same rating model for the Competencies, and Goals content items. The following table shows the rating levels and the numeric ratings assigned to each level.

Rating Level	Numeric Rating
1--Weak	1
2--Poor	2
3--Average	3
4--Good	4
5--Excellent	5

The following table shows the rating model used for the Competencies and Goals sections, and the rating levels and numeric ratings assigned to each level.

Rating Level	Numeric Rating
1--Weak	5
2--Poor	10
3--Average	15
4--Good	20
5--Excellent	25

The following table shows the rating model for the Overall Summary section and the rating levels and numeric ratings assigned to each level.

Rating Level	Numeric Rating
1--Weak	10
2--Poor	20
3--Average	30
4--Good	40
5--Excellent	50

The following table shows the ratings for the Competencies section.

Competency	Item Numeric Rating
Teamwork	4
Leadership	3
Communication	2
Analytical Skills	4
Ethics	5
Conceptual Thinking	4

The score for the Competencies section is:  $4 + 3 + 2 + 4 + 5 + 4 = 22$ , which maps to the section numeric rating 4--Good.

The following table shows the ratings for the Goals section.

Goal	Item Numeric Rating
Increase sales revenue	5
Cut expenses	3
Grow business in Asia	4
Participate in mentoring	4

The score for the Goals section is:  $5 + 3 + 4 + 4 = 16$ , which maps to the section numeric rating 3--Average.

To determine the overall rating, the application adds the Competencies and Goals sections:  $22 + 16 = 38$ , which maps to the section numeric rating 4--Good.

## Example 2: Sum Method with Average and Sum Sections

For a performance evaluation for a specific project, ABC Company sets up a performance template that uses the sum method for the Overall Summary and Competencies sections, but the Goals section uses the average method. In the Competencies section, the content items use a rating model different than that of the section itself. The section uses the same rating as the Overall Summary section. The Goals section uses the same rating model for content items as the Goals section itself.

The following table shows the rating levels and the numeric ratings assigned to each level for the individual content items in the Competencies section.

Rating Level	Numeric Rating
1--Weak	1
2--Poor	2
3--Average	3
4--Good	4
5--Excellent	5

The following table shows the rating levels and the numeric rating assigned to each level for the Competencies section itself.

Rating Level	Numeric Rating
1--Weak	10
2--Poor	20



Rating Level	Numeric Rating
3--Average	30
4--Good	40
5--Excellent	50

The following table shows the worker ratings for the Competencies section.

Competency	Item Numeric Rating
Teamwork	4
Leadership	3
Communication	2
Analytical Skills	4
Ethics	5
Conceptual Thinking	4

The application calculates the sum of the item rating scores:  $4 + 3 + 2 + 4 + 5 + 4 = 22$ . To determine the section rating, the application uses the mapping rules for the rating model assigned in the performance template. In this example, the mapping rule is Nearest, which assigns the section a rating level of 2.

The following table shows the ratings for the Goals section, which uses the average method.

Goal	Item Numeric Rating	Maximum Rating from Rating Model	Decimal Score (Item Rating / Maximum Rating)
Increase sales revenue	5	5	1.0
Cut expenses	3	5	0.6
Grow business in Asia	2	5	0.4
Participate in mentoring	4	5	0.8

The sum of the decimal scores is 2.8, from a possible maximum of 4.0. The 2.8 must be converted to a value on the rating model for the section. The section maximum numeric rating is 5, so the Goals section calculated rating is:  $(2.8 / 4) \times 5 = 3.5$ .

To determine the Goals final section rating, the application uses the mapping rules for the rating model assigned in the performance template. In this example, the mapping rule is Nearest and the calculated section rating for goals is 3.5 out of 5, which maps to a numeric rating of 4.

To determine the overall rating, the application calculates the sum of the numeric ratings for the Competencies and Goals sections:  $20 + 4 = 24$ , which maps to the section numeric rating 20-.

### Example 3: Band Method

ABC Company sets up a performance template in which the section ratings are calculated using exactly the same parameters as in the previous example, but the band method is used for the Overall Summary section to calculate the overall rating.

The following table shows the review point ranges set up for the Overall Section rating model to assign the rating level for the overall rating.

Rating Level	From Points	To Points
1--Weak	0	5
2--Poor	6	10
3--Average	11	25
4--Good	26	40
5--Excellent	41	50

To determine the overall rating, add the section numeric ratings from the previous example. The Competencies numeric rating is 20; the Goals section numeric rating is 4. The total is:  $20 + 4 = 24$ . Using the total numeric rating and applying the point ranges shown in the table, the total score of 24 for the sections lies in the range of 11 to 25. The worker's overall rating is 3-Average.

## Setting Up Writing Assistant for Performance Documents: Explained

Set up the Writing Assistant feature to assist managers in writing useful comments in the performance documents of workers during a performance evaluation. The Writing Assistant provides suggestions that are associated with competencies and their correlated proficiency levels to managers. The suggestions help managers describe observed worker actions, and those workers aspire to perform.

To set up the Writing Assistant, you must:

- Create the Profile Content section
- Upload development tips and feedback

Writing Assistant is available only for the Profile Content section type you configure for competencies.

## Creating the Profile Content Section

To set up the Writing Assistant, you must create and configure a Profile Content section for competencies. You create the Profile Content section using the Manage Performance Template Section or the Manage Performance Template tasks in the Setup and Maintenance work areas.

Select the **Enable writing assistant for manager** option in the **Section Content** section of the Create Performance Template Section page to make it available in the performance document.

The Writing Assistant provides suggestions only for competencies and their respective proficiency levels. If you set up the competencies section to use both proficiency levels and performance ratings, the Writing Assistant provides suggestions only for the selected proficiency levels. If you set up the section to use only performance ratings, Writing Assistant displays only development tips associated with the selected competency.

The Copy Worker Comments feature is available in the performance document when the Writing Assistant isn't configured, or when the competencies section is configured to use only performance ratings. The feature is also available on the Goals and Overall Summary section types.

## Uploading Development Tips and Feedback

To use the Writing Assistant, you must also upload development tips and feedback suggestions for competencies using a spreadsheet loader. You upload development tips and feedback suggestions on the Manage Content Items page for competencies in the Oracle Fusion Profile Management business process.

### Related Topics

- [Writing Assistant: How it Works with Performance Documents](#)

## Creating a Profile Content Performance Template Section: Worked Example

This example demonstrates how to create a Profile Content section to rate competencies in the performance document and use calculated ratings to determine the overall rating.

The following table summarizes key decisions for this scenario.

Decisions to Consider	In This Example
What type of section is this?	Profile Content section, for competencies
Calculate section ratings? With which calculation rule?	Yes, the section uses the Average calculation rule
Which section rating model is used?	Any
Weight the section?	Yes, the weight complements the Goals section weight so the sum of the sections is 100
Enable content items for the section?	Yes
Rate content items?	Yes, using the proficiency rating type, and section rating model

Decisions to Consider	In This Example
What properties are included with the content items?	<b>Weight, Required, Target Proficiency Level</b>
What is the source of competencies for the content items?	Worker job profile
Do you require any content items to be added to the section?	Yes, one content item is required
Enable the writing assistant to suggest comments managers can add for competencies?	Yes

## Summary of the Tasks

Create a Profile Content performance template section.

1. Enter the section details.
2. Enter section processing details.
3. Enter item processing details.
4. Enter section content details.

## Entering the Section Details

1. On the **Set Up Workforce Development** work area, click **Manage Performance Template Sections** to open the **Manage Performance Template Sections** page.
2. Click **Create**.
3. On the **Create Performance Template Section** page, in the **Section Details** region, complete the fields, as shown in this table.

Field	Value
<b>Name</b>	Competencies
<b>Description</b>	This section is used to rate competencies and calculate section ratings as part of the overall ratings. The section weight section is 40 to complement the Goals section.
<b>From Date</b>	01/01/2011
<b>To Date</b>	12/31/2015
<b>Status</b>	Active

4. Click **Save**.

## Entering Section Processing Details

1. In the **Section Processing** region, complete the fields, as shown in this table.

Field	Value
<b>Section Type</b>	Profile Content
<b>Rate Section</b>	Select
<b>Calculation Rule for Section</b>	Average
Decimal Places	2
Decimal Rounding Rule	Standard
Mapping Metric	Numeric Rating
Mapping Method	Nearest
<b>Section Rating Model</b>	Any
<b>Weight section</b>	Select
<b>Item Weight</b>	40

2. Click **Save**.

## Entering Item Processing Details

1. In the **Item Processing** region, complete the fields, as shown in this table. Use the default values except where indicated.

Field	Value
<b>Enable items</b>	Select
<b>Add and remove items during task to set goals</b>	Select
<b>Rate items</b>	Select
<b>Rating Type</b>	Proficiency
<b>Use section rating model for performance rating</b>	Select
<b>Item Calculation</b>	Proficiency
<b>Weight</b>	Select

Field	Value
<b>Required</b>	Select
<b>Target Proficiency Level</b>	Select

2. Click **Save**.

## Entering Section Content Details

1. In the **Section Content** region, complete the fields, as shown in this table. Use the default values except where indicated.

Field	Value
<b>Use profile related to worker's job data</b>	Select
<b>Profile Type</b>	Job profile type
<b>Use specific content items</b>	Select
<b>Enable writing assistant for manager</b>	Select

2. In the **Content Items** region, click **Add**.
3. In the **Content Items** region, complete the fields, as shown in this table. Use the default values except where indicated.

Field	Value
<b>Item Name</b>	Any
<b>Target Proficiency Level</b>	Any
<b>Weight</b>	Any
<b>Required</b>	Select

4. Click **Save**.

## Creating a Goals Performance Template Section: Worked Example

This example demonstrates how to create a Goals section to rate goals in the performance document and use calculated ratings to determine the overall rating.

The following table summarizes key decisions for this scenario.

Decisions to Consider	In This Example
What type of section is this?	Goals
Calculate the section rating? With which calculation rule?	Yes, the section uses the Average calculation rule
Which section rating model?	Any
Weight the section?	Yes, the weight should complement the Competencies section weight so the sum of the sections is 100
Enable content items for the section?	Yes
Give workers and managers the opportunity to add goals during the Set Goals task, if that task is included in the process flow?	Yes
Rate content items?	Yes, using the Performance rating type, and the same rating model as the section uses
What properties are included with the content items?	Weight, Required, Target Performance Level
What is the source of goals for the content items?	Oracle Fusion Goal Management
Add content items to the section?	Yes, add one content item.

## Summary of the Tasks

Create a Goals performance template section.

1. Enter the section details.
2. Enter section processing details.
3. Enter item processing details.
4. Enter section content details.

## Entering the Section Details

1. On the **Set Up Workforce Development** work area, click **Manage Performance Template Sections** to open the **Manage Performance Template Sections** page.
2. Click **Create**.
3. On the **Create Performance Template Section** page, in the **Section Details** region, complete the fields, as shown in this table.

Field	Value
<b>Name</b>	Goals

Field	Value
<b>Description</b>	This section is used to rate goals and calculate section ratings as part of the overall ratings. The section weight section is 60 to complement the Competencies section.
<b>From Date</b>	01/01/2011
<b>To Date</b>	12/31/2015
<b>Status</b>	Active

4. Click **Save**.

## Entering Section Processing Details

1. In the **Section Processing** region, complete the fields, as shown in this table.

Field	Value
<b>Section Type</b>	Goals
<b>Rate Section</b>	Select
<b>Calculation Rule for Section</b>	Average
<b>Decimal Places</b>	2
<b>Decimal Rounding Rule</b>	Standard
<b>Mapping Metric</b>	Numeric Rating
<b>Mapping Method</b>	Nearest
<b>Section Rating Model</b>	Any
<b>Weight section</b>	Select
<b>Section Weight</b>	60

2. Click **Save**.

## Entering Item Processing Details

1. In the **Item Processing** region, complete the fields, as shown in this table. Use the default values except where indicated.

Field	Value
<b>Enable items</b>	Select



Field	Value
<b>Add and remove items during task to set goals</b>	Select
<b>Rate items</b>	Select
<b>Use section rating model for performance rating</b>	Select
<b>Target Performance Level</b>	Select
<b>Weight</b>	Select
<b>Required</b>	Select
<b>Description</b>	Select

2. Click **Save**.

## Entering Section Content Details

1. In the **Section Content** region, complete the fields, as shown in this table. Use the default values except where indicated.

Field	Value
<b>Populate with Worker Goals</b>	Select
<b>Use specific content items</b>	Select

2. In the **Content Items** region, click **Add**.
3. In the **Content Items** region, complete the fields, as shown in this table. Use the default values except where indicated.

Field	Value
<b>Item Name</b>	Any
<b>Performance Rating Model</b>	Any
<b>Target Performance Rating</b>	Any
<b>Weight</b>	Any
<b>Required</b>	Select

4. Click **Save**.

## Review Periods

### Review Periods in Talent Management: Explained

Review periods are business periods that you use to link Oracle Fusion Talent Management business objects to measure and achieve results within the review period time line. Review periods enable you to organize your processes around goal management and performance evaluations into time bound business cycles. Review period is a common component that ties to goal plans and performance document periods. For example, you can connect an employee's performance to business objectives and results by associating goal plans in Oracle Fusion Goal Management and performance documents in Oracle Fusion Performance Management with business periods using review periods.

### Managing Review Periods

As an HR specialist, you create and manage review periods by using the Manage Review Periods task. You can open the task:

- In the Related Links panel on the Tasks tab on the My Goals page in the Goals work area
- On the Tasks tab on the My Evaluations page in the Performance work area
- In the Setup and Maintenance work area

Each review period must have a unique name. You can create review periods any time, and later associate them with goal plans, goal plan sets (if enabled), and performance documents. If a review period is in use by a business object, then you can't modify the start and end dates of the review period. The application also adds the tag In Use to the review period next to the Status attribute on the Edit Review Period page. If the review period isn't used by any business objects, the application adds the tag Not in Use.

You can set the review period status to active or inactive any time. The business objects already associated with an inactive review period will still use the review period. Inactive review periods are no longer visible to HR specialists when creating a business object, such as a goal plan, goal plan set, or performance document. Workers can't view inactive review periods on the application pages.

### Associating Goal Plans, Goal Plan Sets, and Performance Documents with Review Periods

You create review periods to associate with goal plans and performance documents that fall within the review period dates. In the performance template, you select the review period to associate with a performance period from which the performance document is created. This enables you to connect an employee's performance evaluation with progress towards a performance goal in a goal plan within a business cycle. If goal plan sets are enabled, you must also associate review period with sets within the review period time frame, thereby, associating all goal plans within a goal plan set with the selected review period.

#### *Related Topics*

- [Goal Plans: Explained](#)
- [Goal Plan Sets: Explained](#)
- [Performance Documents: How They Work with Goals](#)

# Performance Document Types

## Performance Document Types: Explained

You must create performance document types to associate with performance templates to create performance documents. You can use the document types to differentiate performance templates used to evaluate workers.

You can also use performance document types to determine:

- Which performance documents provide interim ratings in later performance documents
- Which goal plans that goals added to performance documents are added to

This topic describes the attributes of performance document types and how document types are used by performance templates and goal plans. Use the Manage Performance Document Types task in the Setup and Maintenance work area.

### Attributes

Along with the name and optional description, you configure the following attributes:

- **From Date** and **To Date**: The from date must be the same as or before the performance template from date, and the to date must be the same as or later than the performance template to date for the document type to be valid in the template.
- **Status**: Set the status to **Active** to make it available for performance templates and performance goals plans. Once it's used by a template or goal plan, you cannot set it to Inactive.
- **Worker can select manager when creating document**: When selected, the worker can search and select a different manager than the direct manager on the Create Performance Document dialog box. The selected manager becomes the manager of the performance document. You can override this setting by selecting or deselecting the **Worker can select manager when creating document** check box on the Processing tab of the performance template that uses the document type.

### About Performance Templates

You must select a performance document type to include in every performance template. You select the document type on the General tab of the performance template.

In addition, if you configure the performance template to use interim evaluations, you must select at least one document type to associate with the document period. The document types and review periods you select on the Document Periods tab determine which interim ratings and comments appear in the later performance document. The ratings, comments, or both (depending on configuration) from performance documents associated with those document types appear in the document.

You can use the same document types, or create unique ones for the interim and final performance documents.

### About Goal Plans

When creating a goal plan that you select to include in performance documents, you must select the document types to associate with the goal plan. The document type, in conjunction with the selected review period, determines which goal plan that goals added to the performance document are assigned to.

For example, assume that:

- Goal Plan A is associated with Performance Document Type B.

- Performance Document Type B is selected as the document type on the General tab of Performance Template C.
- Performance Document D is created using Performance Template C.

When a worker or manager adds a performance goal to Performance Document D, the goals are automatically added to Goal Plan A.

#### *Related Topics*

- [Goal Plans: Explained](#)

## Performance Templates

### Setting Up the Performance Template: Critical Choices

Define performance templates to create the performance documents that managers, workers, and participants use to evaluate workers' performance for a given time period or project. The performance template combines the process flow definition, the section definitions and the document type. The performance template can also contain static content, such as competencies and goals. When creating the performance template, you must determine:

- Document types and eligibility profiles
- Participation roles
- Process flow
- Calculation rules, processing options, and participant options
- Structure
- Content
- Periods

To create performance templates, use the Manage Performance Templates task in the Setup and Maintenance work area.

#### Document Types and Eligibility Profiles

Select or create a document type to identify the type of evaluation that the performance template supports, such as annual evaluation, or project evaluation.

Associate eligibility profiles to the overall template, or to the document periods, to restrict the performance documents made from the template to those who meet the eligibility criteria. Specify profiles as required to limit access to the document to workers who meet all required profiles and one that isn't selected as required, if any. Workers must meet the profile criteria for at least one of the not-required profiles to use the document.

#### Participation Roles

Specify the roles that are eligible to access the performance document. You can select **Manager**, **Worker**, or any participant roles created in the Manage Performance Roles task. On the Structure tab, you select which roles can access the individual section in the performance document to provide ratings and comments, questionnaire feedback, and perform other actions. For example, if you set up the performance template so that only managers rate workers, but workers can see the results, then you must select both roles as participants. If, however, the manager rates workers without the workers participating in the performance evaluation process or viewing results, then you can select only the manager role.

In the Participation section, you also determine the minimum number of participants required for participant feedback, and the minimum for each role. These settings aren't enforced but serve as a guideline for managers and workers when they request participant feedback.

## Process Flow

The process flow determines which tasks are included in the performance template. You can select a previously-defined process flow or create one as you create the template.

The process flow also determines which sections you can add to the performance template. If the performance template is used to rate workers, set goals, and let workers and managers provide final feedback, the process flow you select must include all those tasks. You can only add sections to the performance template that are required by the process flow. For example, if the process flow doesn't include the Worker Final Feedback task, you can't add that section to the performance template.

## Calculation Rules, Processing Options, and Participant Options

Select whether to calculate ratings and display the calculated ratings for performance template sections. The sections included in the performance template must be set up to use calculated ratings to use this feature.

Use processing options to select the following features:

- Designate whether managers, workers, and participants can select star ratings to rate items and sections. For star ratings, the number of stars correspond to the rating descriptions set for each star. For example, one star may represent the Foundation rating description, two stars may represent the Intermediate rating description, and so on. Star ratings can be used only for rating models that use 10 or fewer rating levels. If you specify not to use star ratings, managers, workers, and participants select the rating descriptions from a choice list. The rating description displays no numeric rating, but the description corresponds to a rating number set up for the rating model. The number that corresponds to the rating description selected by the worker or manager is used to calculate ratings.
- Include digital signature to require workers to verify that they're the people submitting the performance document as part of the Worker Final Feedback task.
- Display kudos on the nonprint versions of the performance document to use them as a guide to rate workers while the evaluation is in progress. The Kudos section appears on the Profile Content, Goals, and Overall Summary tabs of the performance document. The Kudos section isn't part of the official evaluation, so it doesn't appear on the completed performance document. Kudos aren't visible to participants.
- Let workers select a manager other than their direct managers to manage and rate them. This approach can be used, for example, when workers are assigned special projects working for managers other than their direct manager.

Participant options let you determine whether participant feedback is required for the performance document, which isn't enforced but serves as a guideline for managers and workers. You also specify:

- Whether to let workers view participants selected by the manager to provide feedback
- Whether to auto-populate matrix managers of a worker as participants to avoid manually adding them as participants
- Default participant role assigned to matrix managers
- Whether matrix managers can access worker documents automatically after they're created

## Structure

Add previously-defined sections or create ones that are required for the process flow selected for the template. You must select or create one of each type of the sections that are required for this particular template. You can edit previously-defined sections to suit the template requirements, including processing options, properties and content.

For each section, you must select which roles have access to the section in the performance document to view and if applicable, provide ratings, comments, and questionnaire feedback. For the Profile Content, Goals, and Overall Summary sections, you can select whether to require ratings and comments for the content items in the section. If you enable section ratings for the Profile Content and Goals sections and select the option to require section ratings, the process flow must include an Overall Summary section. For the Questionnaire section, you can select whether to require comments only. If you require comments for the Questionnaire section, then you must also select the **Participant Role Can Enter Comments Visible to Worker** for the section. If you give participants the option to provide comments on the Questionnaire section, they can't provide comments on the Overall Summary section. Only one set of overall comments can be provided.

## Content

For each section that contains content that can be rated, you can add content items directly to the performance template so they appear on the performance document. For both Goals and Profile Content sections you can load content that was included in the previously-defined section. For a Profile Content section, such as competencies, you can also copy content from whatever profile the section uses as a source for content items. You must set up profiles to be used as a source in this case.

This lets you target this performance template as broadly or narrowly as you need. You can decide to load content items from the section, for example, that apply to everyone who's rated using the performance document created from this template. But you may decide not to copy content directly from a profile in the template because the population being evaluated has varied profiles. The workers and managers can then copy profile content on the performance document itself (if the process flow is set up to let them). In this case, the profile content is specific to the worker.

## Periods

You can create a single, or multiple periods, within a performance template. Adding multiple periods enables you to create performance documents from the same template for different periods. This is useful when the performance documents are treated as distinct documents, but contain the same process flows, sections, and processing rules. For example, you can create a template for an annual evaluation to use every year. The content is updated for each worker because the competencies are pulled from the selected profile type, and goals are pulled from Oracle Fusion Goal Management. Managers and workers can add additional content to the performance document as well.

For the selected period, you must configure:

- Review periods: Select the review period for the document period
- Performance document start and end dates: These must be the same as, or within, the review period start and end dates.
- Short name: The name that appears in the rating history analytic.
- Available to use: Select to display the performance document on the My Manager Evaluations and My Evaluations pages so managers and workers can access it.
- Due dates: Within each period, you can set the due date for each task that's included in the process flow used by the performance template.

On the document periods you add, you can also add:

- Eligibility profiles: Add additional eligibility profiles or remove the ones inherited from the General tab, and select whether they are required.
- Document types for interim evaluations: Add document types for any interim evaluations you want to appear in the performance document for the selected period.
- Questionnaires: Add roles and associate them with questionnaires to give the role access to the appropriate questions on which to provide feedback in the performance document.

## Defining Processing Roles for Performance Template Sections: Points to Consider

Add roles to performance template sections and define processing settings for each role so managers, workers, and participants can access the sections to rate workers and provide feedback. You must decide:

- Which roles to add to each section
- Whether ratings and comments for items and sections are required
- Whether to share ratings and comments with workers
- Whether to update worker profiles with ratings and content items
- Which roles can access questionnaires and feedback

You add roles to sections on the Content tab of the Create and Edit Performance Template pages. You can find those pages using the Manage Performance Templates task in the Setup and Maintenance work area.

### Adding Roles to Sections

You must add all the roles that require access to the section, whether to provide ratings or feedback, or view the section. For example, if your organization requires only managers to rate goals, but workers can only view the goals and ratings, you must add both the manager and worker roles to that section.

If the section type is used by a specific role to provide ratings or feedback, you must still add that role. For example, workers provide feedback on the Worker Final Feedback section type. However, you must add the worker role to the Worker Final Feedback section so the worker can access it. For the manager to be able to view worker comments on the Worker Final Feedback section, you must also add the manager role.

The roles that are available to add to the section are those you added in the **Participation** section of the **General** tab of the performance template.

### Requiring Ratings and Comments

You can configure the section so ratings and comments are either required, or optional, for both items and the section. The available options are:

- **Optional with warning message:** Warning message when no ratings or comments are provided. This is the default value for all ratings and comments.
- **Optional with no warning message:** No message because ratings and comments are optional.
- **Required:** Error message when roles that are required to provide ratings or comments don't provide them.

You can set up the section so one role is required to provide ratings and comments, but for other roles, they are optional.

To enable item ratings and comments, you must also select **Enable ratings for items** in the **Ratings and Calculations** section of the section. To allow section ratings and comments to be used, you must select **Enable section rating** in the **Ratings** section of the section.

### Sharing Ratings and Comments with Workers

After adding the role, specify whether to share with workers the ratings or comments that managers or participants provided in the Profile Content, Goals, or Overall Summary sections. You can configure different settings for each participant role, so workers can see participant ratings and comments for one role, but not another. In the Manager Final Feedback and Worker Final Feedback sections, specify whether workers can view the manager comments. Ratings and comments provided by

workers and participants are always visible to all managers who have access to the performance documents. Participants can't view manager or worker ratings and comments.

## Updating Worker Profiles with Ratings and Content Items

For the Profile Content section type, specify whether to update the worker profile with the ratings provided by the manager and any content items that were added to the performance document that aren't in the worker profile.

For the Overall Summary section, specify whether to update and display the overall performance rating provided by the manager. When you select the option, the rating appears in the:

- Person profile
- Performance Evaluations graph on the Experience and Qualifications portrait cards

For both section types, you must select the person profile type to which the information is updated, if it is not automatically selected.

If you elect to update profiles, you can also specify the instance qualifier to identify that the source of the ratings and content items is the performance document. Instance qualifiers must be set up and maintained in Oracle Fusion Profile Management to use this feature.

## Accessing Questionnaires and Feedback

When the Manage Participant Feedback task is included in the process flow used by the template, you specify which roles can see the participant questionnaires. You specify whether:

- Line managers and matrix managers can see questionnaires and feedback provided by workers and participants, including the participant names.
- Workers can see questionnaires and feedback provided by the manager and participants, including the participant names.
- Line managers, matrix managers, and workers can see the participant names and their roles.

When you use questionnaires for participant feedback and configure the template so that workers can't view participant feedback, you can set the **Participant Role Can Enter Comments Visible to Worker** setting to **Yes** for a participant role. Participants with that role can then add overall comments to the questionnaire that are visible to both the manager and worker. The worker can't view the name of the participants. This option is only available if participants aren't given access to the Overall Summary section where they can provide overall comments.

### Related Topics

- [Instance Qualifier Sets: Explained](#)

## Interim Evaluations in Performance Documents: Explained

You can configure performance templates and document periods to display the ratings and comments from interim evaluations in subsequent performance documents. This topic explains what interim ratings are and use cases for them, how you configure them, and how to display them.

### Use Cases for Interim Evaluations

You can use interim documents to view ratings and comments from previous performance documents in later, or final performance documents in an evaluation period. For example, you can configure interim and later performance documents to capture and display ratings and comments for:

- Midyear or quarterly evaluations



- Project evaluations
- Previous annual evaluations

You can configure interim documents to capture the same, more, or less information than, for example, an annual evaluation. For example, you can configure the interim evaluation to require comments, but not ratings, for content items and sections. Or, for simplicity, the interim evaluation may not contain tasks for participant feedback or approvals.

## Available Ratings and Comments

The ratings and comments you configure to appear in each performance document are those that appear in the later documents. You can configure ratings, comments, or both to appear for the Overall Summary, Profile Content (competencies) and Goals sections, and ratings only for content items.

If you configure some ratings or comments to appear in the interim, but not the later performance document, the later document doesn't display the ratings or comments from the interim document. For example, if you include section ratings in the performance template for the interim evaluation, but not in the final evaluation template, the section ratings don't appear in the final performance document.

## About Configuring Interim Evaluations

Interim evaluations appear in subsequent documents based on configuration of:

- Review periods
- Document types
- Document periods on the performance template

Review periods must be the same for both the interim and later documents that consume the interim documents.

To make interim evaluations appear in later, or final performance documents, you must select at least one document type to associate with the document period for the final document. The document types you select on the Document Periods tab determine which interim ratings and comments appear in the final performance document. The ratings, comments, or both (depending on configuration) from performance documents associated with those document types appear in the document.

Document types associated with the performance templates used for the performance documents can be the same, or different for the interim and later documents, depending on your needs. The document types must be the same for all interim evaluations that you want to appear cumulatively. For example, if your organization uses quarterly evaluations, to see the ratings for all previous quarters in subsequent quarters, each must use the same document type. If you want to isolate interim performance documents from each other, but have them appear in a final document, the interim performance documents must use different document types. You might use this approach, for example, if you have both midyear and project evaluations and need neither to be visible to the other, but both to appear in an annual evaluation.

In the document period of the performance templates you use to create the performance documents you select the review period. In the document period for each later document in which you want interim documents to appear, you also must select the document types for the interim evaluations you want to appear. If you have only one document type, such as for cumulative quarterly evaluations, select the document type those documents use. If you have multiple evaluations to display, such as for the midyear and project evaluations mentioned previously, select all document types that apply.

## Access to Interim Ratings

Interim ratings and comments appear in the final document in this way:

- Section and Overall Summary ratings appear on the dialog box that appears when you click the **Information** icon for the section.
- Content items appear on the dialog box that appears when you click the **Information** icon for the same content items, and using the **Interim** link on the content item detail dialog box.

For individual content items, you can view ratings and comments from interim evaluations only for each matching content item. For example, if you have a competency in Period 1, and the same competency in Period 2, you can select the Information icon in Period 2 performance document to see the Period 1 information. If that competency isn't part of the template or configured to appear as part of a profile in Period 2, it doesn't appear.

In the dialog box that appears, you can click the performance document name to open a PDF of the interim performance document to see the entire interim performance document.

## Setting Up Performance Document Periods: Points to Consider

You configure document periods on a performance template from which to create performance documents. Performance documents are created from the document period and the configured attributes, such as the review period, document types, and associated questionnaires. You can also associate eligibility profiles to determine which workers can access the documents. This topic describes the configuration options for document periods. You configure performance templates using the Manage Performance Templates task.

### Document Periods

You can add a single, or multiple periods, within a performance template. Adding multiple periods enables you to create performance documents from the same template for different periods. This lets you create performance documents that are treated as distinct documents, but contain the same process flows, sections, and processing rules.

#### Name

The name of the document period is the name of the performance document created for the period.

#### Review Period

You must select a review period for the document period. The review period typically corresponds to the talent business period, such as a calendar or fiscal year, or semiannual period. You can select different review periods for different document periods. The review period also helps determine which goal plans any goals added to the performance document are added to. The goals in the performance document are added to goal plans that are associated with both the:

- Review period selected for the document period
- Document type selected for the template

Goal plans are available only when Oracle Fusion Goal Management is enabled.

### Performance Document Start and End Dates


The performance document start and end dates must be the same as, or within, the review period start and end dates. The dates for periods can overlap, but can't be identical for the same template.

#### Short Name

The short name appears in the rating history analytic for each of the three years that appear, rather than the complete performance document name.

#### Available to Use

**Available to Use** is the default setting, and enables managers and workers to create documents for the period.

 **Note:** The profile option settings **Number of future years from the current date** and **Number of past years from the current date** take precedence over this setting. Therefore, documents don't appear to managers and workers outside the date range of the profile option settings.

When you deselect **Available to Use**:

- Managers and workers can't create the document.
- Human resource (HR) specialists can still search and select the document using the Create Performance Documents or Monitor Missing Performance Document tasks.

You can deselect the **Available to Use** option to prevent access, for example, if you have created future periods, but don't want to make them available yet. Documents that are already created aren't affected by the **Available to Use** selection.

## Eligibility Profiles

Add eligibility profiles to the period to associate the profiles with the performance documents to restrict access to the documents made from the templates. Only workers who meet the eligibility criteria can have the performance documents created for them or access them. Managers can still access the performance documents even if they aren't eligible for them. You can add different eligibility profiles to each period. Eligibility profiles added to the General tab appear automatically on the Document Periods tab.

You can remove or select or deselect Required as needed for your business process. If you select eligibility profiles for a document period, the application assigns performance documents as follows:

- If all eligibility profiles are marked as required, then an individual must meet criteria of all the eligibility profiles.
- If no eligibility profile is marked as required, then an individual must meet criteria of at least one eligibility profile.
- If some eligibility profiles are marked as required and some aren't, then an individual must meet criteria of all the required profiles and at least one nonrequired profile.
- If only one eligibility profile is marked as required, then an individual must meet criteria of that eligibility profile.

## Document Types for Interim Evaluations

If you use interim evaluations as part of your review process, you must configure the document period that consumes the interim evaluations. The ratings and comments in the interim documents appear in the later performance document. Using the combination of the document type and review period used in the interim and final performance documents, the application determines which interim documents are included in the final document.

Interim evaluation ratings and comments appear in the final performance document when:

- You add the document type for the interim evaluation to the document period of the later, or final, evaluation. You can add document types for each interim evaluation you want to appear in the final evaluation.
- The review periods of the interim evaluations and the final evaluation are the same.
- The performance documents from the interim evaluations are completed.

## Due Dates

Within each period, you can set the due date for each task that's included in the process flow used by the performance template. The due date for each task must be the same or later than the task before, with the exception of the Manage Participant Feedback task. The due date for the Manage Participant Feedback task must be the same or earlier than the Manager Evaluation of Workers task due date.

The due dates are guidelines and don't prevent performance documents from being created or tasks from being completed.

## Questionnaires

When using participant feedback, you specify for a period which questionnaire to associate with each participant role, including the manager and worker roles. The role then has access to the appropriate questions on which to provide feedback in the performance document.

## Associating Eligibility Profiles with Performance Templates: Points to Consider

Add eligibility profiles to a performance template to associate the profiles with the performance documents to restrict access to the documents made from the templates. When associating eligibility profiles to performance templates, you must decide whether to:

- Use eligibility profiles
- Add eligibility profiles at the template-level or period-level
- Require eligibility profiles
- Add or remove eligibility profiles when the template is in use

You manage performance templates using the Manage Performance Templates task in the Setup and Maintenance work area.

## Using Eligibility Profiles

Add eligibility profiles to performance templates to target performance documents to a specific population of workers. This enables you to create an array of performance documents that are appropriate for specific review purposes. For example, you can add an eligibility profile to performance documents that are appropriate for the Sales team, and another for the Information Technology department.

## Adding Eligibility Profiles to the Template General Tab and the Document Periods

You can add existing eligibility profiles to either, or both, the performance template on the General tab and the document periods on the Document Periods tab. You can add as many profiles as required to either the General tab or document periods.

Eligibility profiles you add to the General tab are inherited by the document periods when periods are added to the template. You can add, remove, or change the eligibility profiles for the document periods, and change the required status as well. Only the eligibility profiles associated with a document period are used to determine eligibility for documents created for that period.

## Requiring Eligibility Profiles

You can specify whether or not an eligibility profile is required.

If eligibility profiles are required for the document period, workers must satisfy all required profiles and at least one that isn't required, if any are added, to be eligible for the performance document.

When you add only eligibility profiles that aren't required to the document period, workers must satisfy the criteria for at least one of them to be eligible for the performance document.

## Adding or Removing Eligibility Profiles when the Template is in Use

You can add or remove eligibility profiles from a template or document period even if the template or period is in use. When you add an eligibility profile to a template, any previously-existing periods don't inherit the new eligibility profile.

You can remove all eligibility profiles from the Eligibility Profiles region of the General tab. However, if any eligibility profiles exist at the template level, you can't delete all eligibility profiles from the document periods. You must leave at least one associated with each document period. If the eligibility process is already run for a document period, you can't delete all the eligibility profiles associated with the period. At least one eligibility profile must be associated with that period.

## Creating a Performance Template: Worked Example

This example demonstrates how to create a performance template that's used to create performance documents containing most tasks in a process flow, and rate workers. You manage performance templates using the Manage Performance Templates task in the Setup and Maintenance work area.

The following table summarizes key decisions for this scenario.

Decisions to Consider	In This Example
What type of performance template is this?	Used for an annual performance evaluation
Add eligibility profiles to either the template or performance document periods, and are they required?	Yes, add the same eligibility profile to both the template and the performance document periods, and specify it as required; add an additional eligibility profile to one period, and do not specify it as required
Calculate section ratings and the overall rating? Who can see calculated ratings?	Yes, the worker, manager, participants, and matrix managers can see calculated ratings
Which section rating model to use?	Any
Weight the sections?	Yes, give the Profile Content section a weight of 40, and the Goals section a weight of 60
Enable content items for the section? Include content added to the performance template in the sections?	Yes, enable content items for the Profile Content and Goals sections; add a content item to each section in the template
Is participant feedback required, and is there a minimum requirement for participants?	Yes, feedback is required with a minimum number of participants; participants should providing ratings and comments on the Profile Content, Goals, and Overall Summary sections, and a Questionnaire section must be added to the template to capture participant feedback
Enable options to automatically populate matrix managers as participants? Automatically grant access to performance documents for matrix managers?	Yes
Enable which roles to provide feedback?	Manager, worker, colleague
Should managers share ratings with workers?	Yes, managers share their ratings with workers
Use ratings to update the worker profile?	Yes, use manager ratings to update the worker profile

Decisions to Consider	In This Example
Use the performance template for more than one period?	Yes, set up two performance document periods
Use interim evaluations?	Yes, use the first performance period as an interim evaluation in the second period
Which review periods do I select for the periods?	FY2015

## Summary of the Tasks

Create a performance template.

1. Enter general information.
2. Enter process details.
3. Enter structure details.
4. Load and add content to the Profile Content and Goals sections.
5. Add two document periods, one for each half of an annual evaluation.
6. Review template settings.

## Prerequisites

1. Create a document type that can be used for an annual evaluation.
2. Create a performance role for Colleague and one for Matrix Manager. Configure the Matrix Manager role to enable viewing worker and manager evaluations.
3. Create a process flow with the following tasks and subtasks, in the following order: Set Goals, Worker Self-Evaluation, Manager Evaluation of Workers, Manage Participant Feedback, First Approval, Share Documents, Worker Must Acknowledge Document, Conduct Review Meetings, Worker Must Acknowledge Review Meetings, Worker Final Feedback, Manager Final Feedback.
4. Create the following sections: Profile Content, Goals, Questionnaire, Overall Summary, Worker Final Feedback, Manager Final Feedback.
5. Create the review period named FY2015.

## Entering General Information

1. In the Setup and Maintenance work area, in the **Search** field, enter **Manage Performance Templates** and click **Search** to open the Search page.
2. Click **Manage Performance Templates** to open the Manage Performance Templates page.
3. Click **Create**.
4. On the Create Performance Template page, in the General section, complete the fields, as shown in this table.

Field	Value
<b>Name</b>	Annual Performance Evaluation
<b>Comments</b>	This template is used for an annual performance evaluation.
<b>From Date</b>	01/1/15

Field	Value
<b>To Date</b>	12/31/20
<b>Status</b>	Active
<b>Document Type</b>	Any that can be used for an annual evaluation

5. In the Eligibility Profile section, click **Add**.
6. In the Eligibility Profile section, complete the fields as shown in this table.

Field	Value
<b>Eligibility Profile</b>	Any
<b>Required</b>	Select

7. In the Participation section, click **Add**.
8. Select **Manager**.
9. In the Participation section, click **Add**.
10. Select **Worker**.
11. In the Participation section, click **Add**.
12. Select **Colleague**.
13. In the Participation section, click **Add**.
14. Select **Matrix Manager**.
15. In the Participation section, complete the fields as shown in this table.

Field	Value
<b>Set the minimum number for each role check box</b>	Select
<b>Total minimum number of participants required in the document</b>	2

16. In the **Colleague** and **Matrix Manager** rows, in the **Minimum Number of Participants Required Per Role** column, enter 1.
17. Click **Save**.

## Entering Process Details

1. On the **Process** tab, complete the fields, as shown in this table. Use the default values except where indicated.

Field	Value
<b>Process Flow</b>	The process flow you created as a prerequisite for this task.
<b>Calculate ratings</b>	Select

Field	Value
<b>Display star ratings</b>	Select
<b>Include digital signature</b>	Select
<b>Display kudos</b>	Select
<b>Participant feedback is required</b>	Select
<b>Worker can view participants added by manager</b>	Select
<b>Auto-populate matrix managers of the worker as participants</b>	Select
<b>Default participant role</b>	Matrix Manager
<b>Allow matrix managers to access worker document automatically</b>	Select

2. Click **Save**.

## Entering Structure Details

Add an available section of each type to the performance template, edit the existing settings for the sections, and add the manager and worker roles to each section.

1. Enter structure details for the Profile Content section.
2. Enter structure details for the Goals section.
3. Enter structure details for the Questionnaire section.
4. Enter structure details for the Overall Summary section.
5. Enter structure details for the Final Feedback sections.

### 1. Enter structure details for the Profile Content section

1. On the Structure tab, in the Sections section, click **Add**.
2. In the Section Name section, select the name of the Profile Content section that you created as a prerequisite for this task.
3. In the Section Processing section, complete the fields as shown in this table. Use the default values except where indicated.

Field	Value
<b>Section Type</b>	Profile Content
<b>Rate Section</b>	Select
<b>Calculation Rule for Section</b>	Average
<b>Section Rating Model</b>	Any



Field	Value
<b>Weight section</b>	Select
<b>Section Weight</b>	40

4. In the Item Processing section, complete the fields as shown in this table. Use the default values except where indicated.

Field	Value
<b>Enable items</b>	Select
<b>Add and remove items during task to set goals</b>	Select
<b>Enable ratings for items</b>	Select
<b>Use section rating model for performance rating</b>	Select
<b>Item Calculation</b>	Any
<b>Target Performance Rating</b>	Select
<b>Weight</b>	Select
<b>Required</b>	Select
<b>Target Proficiency Level</b>	Select

5. In the Processing by Role section, click **Add**.  
6. In the Processing by Role section, complete the fields as shown in this table.

Field	Value
<b>Role</b>	Manager
<b>Share Ratings</b>	Yes
<b>Share Comments</b>	Yes
<b>Update Profile</b>	Yes
<b>Person Profile Type</b>	Any
<b>Instance Qualifier Set</b>	Evaluation Type

Field	Value
<b>Instance Qualifier</b>	Supervisor

7. In the Processing by Role section, click **Add**.
8. In the Processing by Role section, complete the fields as shown in this table. Use the default values except where indicated.

Field	Value
<b>Role</b>	Worker

9. Repeat steps 7 and 8, substituting Colleague and Matrix Manager for Worker.
10. Click **Save**.

## 2. Enter structure details for the Goals section

1. On the Structure tab, in the Sections section, click **Add**.
2. In the Section Name section, select the name of the Goals section that you created as a prerequisite for this task.
3. In the Section Processing section, complete the fields as shown in this table. Use the default values except where indicated.

Field	Value
<b>Section Type</b>	Goals
<b>Rate Section</b>	Select
<b>Calculation Rule for Section</b>	Average
<b>Section Rating Model</b>	Any
<b>Weight section</b>	Select
<b>Section Weight</b>	60

4. In the Item Processing section, complete the fields as shown in this table. Use the default values except where indicated.

Field	Value
<b>Enable items</b>	Select
<b>Add and remove items during task to set goals</b>	Select
<b>Enable ratings for items</b>	Select

Field	Value
<b>Use section rating model for performance rating</b>	Select
<b>Item Calculation</b>	Any
<b>Target Performance Rating</b>	Select
<b>Weight</b>	Select
<b>Required</b>	Select

5. In the Processing by Role section, click **Add**.
6. In the Processing by Role section, complete the fields as shown in this table.

Field	Value
<b>Role</b>	Manager
<b>Share Ratings</b>	Yes
<b>Share Comments</b>	Yes
<b>Update Profile</b>	Yes
<b>Person Profile Type</b>	Any
<b>Instance Qualifier Set</b>	N/A
<b>Instance Qualifier</b>	N/A

7. In the Processing by Role section, click **Add**.
8. In the Processing by Role section, complete the fields as shown in this table. Use the default values except where indicated.

Field	Value
<b>Role</b>	Worker

9. Repeat steps 7 and 8, substituting Colleague and Matrix Manager for Worker.
10. Click **Save**.

### 3. Enter structure details for the Questionnaire section

1. On the Structure tab, in the Sections section, click **Add**.
2. In the Section Name section, select the name of the Questionnaire section that you created as a prerequisite for this task.
3. In the Section Processing section, select Questionnaire as the section type.

4. In the Processing by Role section, click **Add**.
5. In the Processing by Role section, complete the fields as shown in this table.

Field	Value
<b>Role</b>	Manager
<b>Manager Questionnaire Can Be Viewed by the Role</b>	Yes
<b>Worker Questionnaire Can Be Viewed by the Role</b>	Yes
<b>Participant Questionnaire Can Be Viewed by the Role</b>	Yes
<b>Participant Name Can Be Viewed by the Role</b>	Yes
<b>Show Role on Feedback Review Page</b>	Yes

6. In the Processing by Role section, click **Add**.
7. In the Processing by Role section, complete the fields as shown in this table. Use the default values except where indicated.

Field	Value
<b>Role</b>	Worker
<b>Manager Questionnaire Can Be Viewed by the Role</b>	No
<b>Worker Questionnaire Can Be Viewed by the Role</b>	Yes
<b>Participant Questionnaire Can Be Viewed by the Role</b>	No
<b>Participant Name Can Be Viewed by the Role</b>	No
<b>Show Role on Feedback Review Page</b>	Yes

8. In the Processing by Role section, click **Add**.
9. In the Processing by Role section, complete the fields as shown in this table. Use the default values except where indicated.

Field	Value
<b>Role</b>	Colleague
<b>Participant Role Can Enter Comments Visible to Worker</b>	No

10. Repeat step 9, substituting Matrix Manager for Colleague.

11. Click **Save**.

#### 4. Enter structure details for the Overall Summary section

1. On the Structure tab, in the Sections section, click **Add**.
2. In the Section Name section, select the name of the Overall Summary section that you created as a prerequisite for this task.
3. In the Section Processing section, complete the fields as shown in this table. Use the default values except where indicated.

Field	Value
<b>Section Type</b>	Overall Summary
<b>Rate Section</b>	Select
<b>Calculation Rule for Section</b>	Average
<b>Section Rating Model</b>	Any

4. In the Processing by Role section, click **Add**.

5. In the Processing by Role section, complete the fields as shown in this table.

Field	Value
<b>Role</b>	Manager
<b>Share Ratings</b>	Yes
<b>Share Comments</b>	Yes
<b>Update Profile</b>	Yes
<b>Person Profile Type</b>	Any
<b>Instance Qualifier Set</b>	N/A
<b>Instance Qualifier</b>	N/A

6. In the Processing by Role section, click **Add**.
7. In the Processing by Role section, complete the fields as shown in this table. Use the default values except where indicated.

Field	Value
<b>Role</b>	Worker

8. Repeat steps 6 and 7, substituting Colleague and Matrix Manager for Worker.
9. Click **Save**.

## 5. Enter structure details for the Final Feedback sections

1. On the Structure tab, in the Sections section, click **Add**.
2. In the Section Name section, select the name of the Worker Final Feedback section that you created as a prerequisite for this task.
3. In the Section Processing section, complete the fields as shown in this table. Use the default values except where indicated.

Field	Value
<b>Section Type</b>	Worker Final Feedback

4. In the Processing by Role section, click **Add**.
5. In the Processing by Role section, complete the fields as shown in this table.

Field	Value
<b>Role</b>	Manager
<b>Share Comments</b>	Yes

6. In the Processing by Role section, click **Add**.
7. In the Processing by Role section, complete the fields as shown in this table. Use the default values except where indicated.

Field	Value
<b>Role</b>	Worker

8. In the Section Name section, select the name of the Manager Final Feedback section that you created as a prerequisite for this task.
9. In the Section Processing section, complete the fields as shown in this table.

Field	Value
<b>Section Type</b>	Manager Final Feedback

10. In the Processing by Role section, click **Add**.

11. In the Processing by Role section, complete the fields as shown in this table.

Field	Value
<b>Role</b>	Manager

12. In the Processing by Role section, click **Add**.  
13. In the Processing by Role section, complete the fields as shown in this table.

Field	Value
<b>Role</b>	Worker

14. Click **Save**.

## Loading and Adding Content to Sections

1. On the Content tab, complete the fields as shown in this table.

Field	Value
<b>Section Name</b>	The name of the Profile Content section you created as a prerequisite for this task.

2. In the Section Items section, click **Load Items from Section**.  
3. In the Section Items section, click **Add**, then complete the fields as shown in this table.

Field	Value
<b>Item Name</b>	Any

4. In the Details section, complete the fields as shown in this table. Use the default values except where indicated.

Field	Value
<b>Target Proficiency Level</b>	Any
<b>Performance Rating Model</b>	Any
<b>Required</b>	Select

5. On the Content tab, complete the fields as shown in this table.

Field	Value
<b>Section Name</b>	The name of the Goals section you created as a prerequisite for this task.

6. In the Section Items section, click **Load Items from Section**.  
7. In the Section Items section, click **Add**, then complete the fields as shown in this table.

Field	Value
<b>Item Name</b>	Any

8. In the Details section, complete the fields as shown in this table. Use the default values except where indicated.

Field	Value
<b>Performance Rating Model</b>	Any
<b>Target Performance Rating</b>	Any
<b>Required</b>	Select

9. Click **Save**.

## Adding Document Periods

- On the Document Periods tab, in the Document Periods section, click **Add**.
- In the Document Periods section, complete the fields as shown in this table.

Field	Value
<b>Name</b>	2015 Performance Evaluation First Half
<b>Review Period</b>	FY2015
<b>From Date</b>	1/1/15
<b>To Date</b>	6/30/15
<b>Short Name</b>	Any
<b>Available to Use</b>	Yes

3. In the Eligibility Profile for the Period section, complete the fields as shown in this table. Use the default values except where indicated.

Field	Value
<b>Eligibility Profile</b>	Any

4. In the Due Dates section, complete the due date for each task as shown in this table.

Task	Due Date
<b>Set Goals</b>	6/24/15



Task	Due Date
<b>Worker Self-Evaluation</b>	7/1/15
<b>Manager Evaluation of Workers</b>	7/8/15
<b>First Approval</b>	7/15/15
<b>Share Performance Documents</b>	7/20/15
<b>Conduct Meetings</b>	7/25/15
<b>Provide Final Feedback</b>	7/30/15
<b>Set Next Period Goals</b>	8/30/15

5. In the Questionnaires for the Period section, click **Add**.
6. In the Questionnaires for the Period section, complete the fields as shown in this table.

Field	Value
<b>Template Role</b>	Manager
<b>Questionnaire Name</b>	Any

7. Repeat steps 5 and 6, substituting Worker, Colleague, and Matrix Manager for Manager.
8. On the Document Periods tab, in the Document Periods section, click **Add**.
9. In the Document Periods section, complete the fields as shown in this table.

Field	Value
<b>Name</b>	2015 Performance Evaluation Second Half
<b>Review Period</b>	FY2015
<b>From Date</b>	7/1/15
<b>To Date</b>	12/31/15
<b>Short Name</b>	Any

10. In the Document Types for Interim Evaluations section, click **Add**.
11. In the Document Type field, select the document type selected on the general tab.
12. In the Due Dates section, complete the due date for each task as shown in this table.

Task	Due Date
<b>Set Goals</b>	12/23/15
<b>Worker Self-Evaluation</b>	1/8/16
<b>Manager Evaluation of Workers</b>	1/15/16
<b>First Approval</b>	1/18/16
<b>Share Performance Documents</b>	1/21/16
<b>Conduct Meetings</b>	1/24/16
<b>Provide Final Feedback</b>	1/31/16
<b>Set Next Period Goals</b>	12/31/16

13. In the Questionnaires for the Period section, click **Add**.
14. In the Questionnaires for the Period section, complete the fields as shown in this table.

Field	Value
<b>Template Role</b>	Manager
<b>Questionnaire Name</b>	Any

15. Repeat steps 11 and 12, substituting Worker, Colleague, and Matrix Manager for Manager.
16. Click **Save**.

## Reviewing Template Settings

1. On the Summary tab, review the settings you entered for the template.
2. Click **Save**.

### Related Topics

- [Creating Performance Documents: Points to Consider](#)

## Setting Up Interim Evaluations in Performance Templates: Procedure

You can create performance document types and configure performance templates and document periods to set up interim evaluations to appear in later performance documents. You can configure the performance template to display ratings and comments for individual content items, section ratings, and the overall summary rating. This topic describes how to create document types and document periods to configure interim evaluations in which ratings and comments appear in successive performance documents, a project evaluation, and an annual performance document.

## Prerequisites

Create performance process flows to include tasks for the manager and worker rating the worker for the annual and quarterly evaluations, and the project evaluations. You can use the same process flow for both.

Create the sections required by the process flow, including at least:

- Profile Content (Competencies)
- Goals
- Overall Summary

Create a review period to use in all performance document periods.

## Creating Document Types

For this procedure, you create document types to use in two performance templates:

- Project Evaluation: Evaluate workers for a project completed within the annual evaluation period. Ratings and comments for the project evaluation appear in the annual evaluation.
  - Annual and Quarterly: Evaluate workers quarterly and annually. The ratings and comments for each interim quarter appear in the subsequent quarter and annual evaluations.
1. In the Setup and Maintenance work area, select the **Manage Performance Document Types** task.
  2. In the Search Results section of the Manage Performance Document Types page, click **Create** to open the Create Performance Document Types page.
  3. In the **Name** field, enter **Project Evaluation**.
  4. Enter a description.
  5. Enter the **From Date** and **To Date**. These dates must be the same as or extend beyond the date range of the performance templates in which they're used.
  6. Set the status to **Active**.
  7. Select **Worker can select manager when creating document** to let workers select the manager who manages their performance documents.
  8. Click **Save and Close** to open the **Confirmation** dialog box.
  9. Click **OK** to return to the Manage Performance Document Types page.
  10. Repeat steps 2 through 9 to create the Annual and Quarterly document type. For step 3, enter the name **Annual and Quarterly**.

## Configuring the Project Evaluation Performance Template

In this procedure, you create the performance template for the project evaluation, which is one of the interim documents that appears in the annual evaluation.

1. In the Setup and Maintenance work area, select the **Manage Performance Templates** task.
2. In the Search Results section of the Manage Performance Templates page, click **Create** to open the Create Performance Template page.
3. Configure the General tab using the following steps.
  - a. On the General tab, enter a name and optionally, comments.
  - b. Enter the **From Date** and **To Date**. The **From Date** must be the same or later than, and the **To Date** the same as or earlier than the **From Date** and **To Date** range of the performance document type, process flow, roles, and sections used in the template.
  - c. Leave the status as **Active**. In the **Document Type** field, select **Project Evaluation**.
  - d. In the Eligibility Profile section, add eligibility profiles to limit the performance documents to eligible workers, if required by your business process.

- e. In the Participation section, select participant minimums, if required by your business process.
- f. Click **Add** to add the roles that evaluate the worker.

 **Note:** Ensure that you add manager and worker roles to the template as only their ratings and comments appear in interim evaluations.

- g. Select the Process tab.
4. Configure the Process, Structure, and Content tabs using the following steps.
- a. In the **Process Flow** field, select a process flow for the project evaluation.
  - b. Configure the Alerts, Calculation Rules, Processing Options, and Participant Options sections as required for your business process.
  - c. Click the Structure tab.
  - d. In the Sections section, click **Add** to add the first section required for the tasks required in the process flow.
  - e. Configure the Section Processing, Item Processing, Section Content, and Processing by Role sections as required to conform to your business process. Note: Ensure that you add manager and worker roles to the section as only their ratings and comments appear in interim evaluations.
  - f. Repeat steps 4.4 and 4.5 for each section required by the process flow.
  - g. Click the Content tab.
  - h. Add content items to the Goals and Competencies sections, if required by your business process.
5. Click the Document Periods tab.
6. Configure the Document Periods tab using the following steps.
- a. In the Document Periods section, click **Add**.
  - b. In the **Name** field, enter a name. The name is the name of the project evaluation performance document.
  - c. Select a review period. The review period must be the same used for the annual performance template.
  - d. Edit the performance document start and end dates, if required for your business process.
  - e. Enter a short name for the period.
  - f. Add eligibility profiles as required for your business process.
  - g. Enter due dates for each task.
  - h. Add roles and select questionnaires as required for your business process.
7. Click the Summary tab.
8. Review the template and click **Save and Close** to open the **Confirmation** dialog box.
9. Click **OK** to reopen the Manage Performance Templates page.

## Configuring the Annual and Quarterly Performance Template

In this procedure, you configure the performance template used for both the annual and quarterly evaluations. On the Document Periods tab, you configure the periods for each so that each quarterly performance document is an interim evaluation. Ratings and comments for each appear in the subsequent quarterly and annual evaluations. You also configure the annual document period so the project evaluation ratings appear.

- 1. In the Setup and Maintenance work area, select the **Manage Performance Templates** task.
- 2. In the Search Results section of the Manage Performance Templates page, click **Create** to open the Create Performance Template page.
- 3. Configure the General tab using the following steps.
  - a. On the General tab, enter a name and optionally, comments.
  - b. Enter the **From Date** and **To Date**. The **From Date** must be the same or later than, and the **To Date** the same as or earlier than the **From Date** and **To Date** range of the performance document type, process flow, roles, and sections used in the template.

- c. Leave the status as **Active**. In the **Document Type** field, select **Annual and Quarterly**.
- d. In the Eligibility Profile section, add eligibility profiles to limit the performance documents to eligible workers, if required by your business process.
- e. In the Participation section, select participant minimums, if required by your business process.
- f. Click **Add** to add the roles that evaluate the worker.

 **Note:** Ensure that you add manager and worker roles to the template as only their ratings and comments appear in interim evaluations.

- g. Select the Process tab.
4. In the **Process Flow** field, select a process flow for the annual and quarterly evaluations.
  5. Repeat steps 4.2 through 4.8 from the Configuring the Project Evaluation Performance Template procedure.
  6. Click the Document Periods tab.
  7. Configure the document period for the first quarter evaluation using the following steps.
    - a. In the Document Periods section, click **Add**.
    - b. In the **Name** field, enter a name for the first quarter performance document.
    - c. Select a review period. The review period must be the same used for the annual performance period.
    - d. Edit the performance document start and end dates, if required for your business process.
    - e. Enter a short name for the period.
    - f. Add eligibility profiles and select roles and questionnaires as required for your business process.
    - g. Enter due dates for each task.
  8. Configure the document period for the second quarter evaluation using the following steps.
    - a. In the Document Periods section, click **Add**.
    - b. In the **Name** field, enter a name for the second quarter performance document.
    - c. Repeat steps 7.3 through 7.7 for the period. The short name must be unique for each period.
    - d. In the Document Types section, click **Add**.
    - e. In the **Document Type** field, select **Annual and Quarterly** so the ratings and comments from the first quarter document appear in the document.
  9. Configure the document period for the third quarter evaluation using the following steps.
    - a. In the Document Periods section, click **Add**.
    - b. In the **Name** field, enter a name for the third quarter performance document.
    - c. Repeat steps 8.3 through 8.5 for the period.
  10. Configure the document period for the annual evaluation using the following steps.
    - a. In the Document Periods section, click **Add**.
    - b. In the **Name** field, enter a name for the annual performance document.
    - c. Repeat steps 7.3 through 7.7 for the period.
    - d. In the Document Types period, click **Add**.
    - e. In the **Document Type** field, select **Annual and Quarterly** so the ratings and comments from each preceding quarter appear in the annual document.
    - f. In the Document Types period, click **Add**.
    - g. In the **Document Type** field, select **Project Evaluation** so the ratings and comments from the project evaluation appear in the annual document.
  11. Click the Summary tab.
  12. Review the template and click **Save and Close** to open the **Confirmation** dialog box.
  13. Click **OK** to reopen the Manage Performance Templates page.

## FAQs for Performance Templates

### What happens if I duplicate a performance template?

You have the option to copy all document period information, if it exists, including eligibility profiles, from the original template. Edit the document period name and short period name on the Document Periods tab to avoid having **Copy** in the title. If you copy periods, the new template opens, otherwise the template appears in the search results list, from where you can open it. You manage performance templates using the Manage Performance Templates task in the Setup and Maintenance work area.

If the template you duplicate is in use, the **In Use** status of the copied template sets to **No** so you can edit it before making it available. When using eligibility profiles, documents made from the template aren't available until eligibility is processed.

### What's a participation role in the performance template?

A role that can access the performance document created from the performance template. You must add to the template every role that is required to participate in viewing, or providing ratings or participant feedback in the performance document. For example, if the process flow requires that managers rate workers and share the performance document, but workers don't provide ratings, you must add both the manager and worker roles. You can select a minimum number of participants required for each role to provide feedback, but the number is a guideline and not enforced.

## Target Ratings Distribution

### Rating Model Distributions: Explained

Create a rating model distribution to set target percentages for worker overall performance ratings that your organization prefers for each rating level of a rating model. You manage rating distributions using the Manage Target Rating Distributions task in the Setup and Maintenance or Performance Management work areas.

### Rating Distribution Analytic

The comparison of the target rating model distribution to the actual distribution of overall ratings for workers appears in the **Rating Distribution** analytic that appears on the My Organization page. The ratings appear when the manager rates the worker and saves the performance document. The analytic displays the number of performance documents for each overall rating provided by the manager next to the number targeted by the rating model distribution. If you don't create a rating model distribution, the **Rating Distribution** analytic appears only with the number of performance documents for each overall rating the managers provide.

## Creating Rating Model Distributions: Points to Consider

You can create rating model distributions to set target percentages for worker overall performance ratings for each rating level of a rating model.

When you create a rating model distribution, consider the following:


- Performance template to associate with the rating model

- Percentages for each rating level
- Date limits for the distributions

You manage rating distributions using the Manage Target Rating Distributions task in the Setup and Maintenance or Performance Management work areas.

## Associating a Performance Template with the Rating Model Distribution

Select a performance template to associate the rating model distribution with a particular performance template so managers can compare the overall ratings to the same rating distribution for all completed performance documents created from the template. The rating model you use for the rating model distribution is the one used by the Overall Summary section of the performance template. You can associate the rating distribution with multiple performance templates.

 **Note:** Before creating the rating model distribution, you must create a rating model and a performance template to associate with the rating model distribution.

## Defining Percentages for Each Rating Level

Define the distribution percentage of performance documents that your organization targets to achieve each overall rating level for the rating model used by the performance template. The total percentage must be 100. The table shows an example of a rating model distribution for a rating model with five levels.

Rating Level	Distribution Percentage
1	5
2	24
3	41
4	24
5	5

The application calculates the percentage of documents for the direct and indirect reports of the manager that would be expected for each rating level. Using the figures in the table as an example, consider an organization in which manager Chris Black has 200 direct and indirect reports. The table shows the overall ratings Chris awarded the reports, and the targeted number of performance documents with those rating levels according to the rating model distribution. These are the figures that are represented in the **Rating Distribution** analytic.

Rating Level	Number of Performance Documents with Manager Ratings at Each Level	Target Number of Performance Documents for Each Rating Level
1	8	20
2	28	48
3	104	82
4	32	48

Rating Level	Number of Performance Documents with Manager Ratings at Each Level	Target Number of Performance Documents for Each Rating Level
5	28	20

In this example, Chris has a lower number of performance documents than targeted for rating levels 1, 2, and 4, and a higher number of performance documents for rating levels 3 and 5.

## Specifying Date Limits

Select the **From Date** to determine when the rating model distribution becomes available. You can optionally select a **To Date** to set an expiration date for the model to replace it with another or discontinue using a rating model distribution. To replace it with another, select a **From Date** for the new rating model distribution later than the **To Date** of the one that expired. If you don't replace an expired rating model distribution with another, the rating model distribution doesn't appear in the Rating Distribution analytic. However, the overall ratings the manager provides do appear.

# Performance and Potential Box Chart Labels

## Performance and Potential Box Chart: Explained

The Performance and Potential box chart analytic gives managers a graphical view of the potential and performance ratings for their workers. Managers can compare their workers, and distinguish high and low performers. The analytic appears on the My Organization page in the Performance Management work area.

This topic discusses describes the key points of the box chart:

- Rating models
- Performance and potential data sources
- Box cell labels
- Analytic viewing options

## Rating Models

The Performance and Potential box chart requires both a performance rating model you select, and the predefined potential rating model. For the Potential rating model, you must configure the attributes of the rating model, but you cannot create and use a different one for the box chart. You configure rating models using the Manage Profile Rating Models task in the Setup and Maintenance work area.

To create the box labels for the Performance and Potential box chart, you must first select the performance rating model to associate with the box chart. Use the Manage Performance and Potential Box Chart Labels task in the Setup and Maintenance or Performance Management work areas to create and update box chart labels.

Select the rating model specified in the performance templates for the overall rating of the Overall Summary section. This ensures that the box chart displays the data from the performance documents created from the templates. The default performance rating model is the one selected in the **Default Rating Model for Performance Management Analytics** profile option.



If you create a performance template that uses another rating model for the Overall Summary section, you must:

- Associate another box chart with that rating model
- Create labels for that box chart

This setup ensures that the data appears in the analytic on the My Organization page.

The performance rating model you select is used along the x-axis to plot performance ratings. The analytic graph uses the potential rating model defined in Oracle Fusion Profile Management for the y-axis to plot potential ratings.

The number of cells that appear on the analytic depends on the rating categories defined for the rating models you use in the analytic. The number of cells is calculated by multiplying the number of rating categories defined for the potential rating model by the number of rating categories for the performance rating model. For example, if each rating model has three rating categories, the total number of cells is: 3 x 3, or 9. If the potential rating model has four rating categories and the performance rating model has three, the total of cells is: 4 x 3, or 12.

## Performance and Potential Data Sources

Performance ratings are collected from performance documents. The performance rating is the overall rating supplied by the manager in the Overall Summary section of the most recently completed performance document.

Managers rate worker potential ratings using the Career Planning tab in Person Spotlight and during a talent review, which could be the most recent potential rating in the worker's profile. Performance and potential ratings are maintained in Oracle Fusion Profile Management.

## Box Cell Labels

You can label each cell in the grid with names that describe the level. For example, if the performance and potential rating models for the graphic display low ratings in the lower left of the grid, you could name the lower left cell Novice. The upper right cell that contains highest performers could be called Top Talent.

## Manager Viewing Options

On the My Organization page, managers can select the performance document for which they want to view the ratings in the analytic. Managers can filter the view to display the data for all their reports or just their direct reports.



# Glossary

## **best-fit analysis**

A calculation of the best possible matches for a selected person or model profile.

## **competency**

Any measurable behavior required by an organization, job, or position that a person may demonstrate in the work context. A competency can be a piece of knowledge, a skill, an attitude, or an attribute.

## **content item**

An individual quality, skill, or qualification within a content type that you track in profiles.

## **content library**

A repository of the content types and individual content items that can be associated with person profiles and profiles for workforce structures such as jobs and positions.

## **content type**

An attribute such as a skill, quality, or qualification that is added to a profile.

## **eligibility profile**

A user-defined set of criteria used to determine whether a person qualifies for a benefits offering, variable rate or coverage, compensation plan, checklist task, or other object for which eligibility must be established.

## **fast formula**

A simple way to write formulas using English words and basic mathematical functions. Formulas are generic expressions of calculations or comparisons that repeat with different input values.

## **goal library**

A central repository of reusable goals maintained by the human resource specialist that managers and workers can copy to use for their own goals.

## **HR**

Abbreviation for human resource.

## **impact of loss**

A value assigned to a worker to rate the effect on the enterprise when the worker leaves.

## **individual score**

The number assigned to each matching content item of the content types for which you specify the priority or importance.

### **instance qualifier set**

A set of values that uniquely identifies multiple instances of the same profile item.

### **job**

A generic role that is independent of any single department or location. For example, the jobs Manager and Consultant can occur in many departments.

### **model profile**

A collection of the work requirements and required skills and qualifications of a workforce structure, such as a job or position.

### **overall score**

The total of all individual scores of all matching content items in a best-fit analysis.

### **participant**

Person other than the manager who provides feedback about a worker's performance or development upon request.

### **participant feedback**

Ratings, comments, and questionnaire responses about the performance of a worker provided by people other than the worker or the worker's manager in a 360 evaluation.

### **performance document**

Online document used to evaluate a worker for a specific time period. The document contains the content on which the worker is evaluated, which could include goals, competencies, and questionnaires.

### **performance document content**

The criteria, such as competencies and goals, contained in a performance document on which an individual is evaluated.

### **performance goal**

A results-oriented goal, often using specific targets, to assess the level of a worker's achievement.

### **performance process flow**

The tasks, and the order in which those tasks are performed, in a performance evaluation.

### **person profile**

A collection of skills, experience, qualifications, work preferences, and career planning information for a worker.

### **position**

A specific occurrence of one job that is fixed within one department. It is also often restricted to one location. For example, the position Finance Manager is an instance of the job Manager in the Finance Department.

### **profile type**

A template that defines the content sections of a profile, role access for each section, and whether the profile is for a person, or for a workforce structure such as a job or position.

### **question library**

A central repository of reusable questions to include in questionnaires.

### **questionnaire**

A set of questions presented in a specific order and format.

### **rating model**

A scale used to measure the performance and proficiency of workers.

### **risk of loss**

A value assigned to a worker to rate the likelihood of the worker leaving the enterprise.

### **sandbox**

A testing environment that isolates untested code changes from the mainline environment so that these changes don't affect the mainline metadata or other sandboxes.

### **source rating**

The rating level associated with a content item of the source profile in the best-fit analysis.

### **talent review**

A series of meetings where organization managers evaluate trends, assess strengths, and address areas of risk for the organization.

### **talent score**

An assessment of a worker's overall value to the enterprise using a custom rating model.

### **target rating**

The rating level associated with a content item of the target profile in the best-fit analysis.

