

Oracle

Talent Management Cloud Implementing Performance Management

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.

Additional Resources

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

Implementing Performance Management: Guide Overview

This guide describes the setup and implementation tasks for the Define Worker Performance task list. Using these tasks you can implement and maintain Oracle Fusion Performance Management to set up performance documents to review workers as part of a performance evaluation.

In addition, this guide includes the Manage Questionnaires setup tasks from the Define Workforce Profiles task list so you can use questionnaires as part of a performance evaluation.

This topic:

- Shows the scope of the guide
- Lists where to find information about prerequisite tasks and pertinent information about implementing Performance Management
- Summarizes the contents of each chapter
- Describes where to find additional information for the tasks in the Define Worker Performance task list

Prerequisites

Before setting up Performance Management you must implement either:

- HCM Base
- Talent Management Base

You are also required to configure other applications and elements. The table lists sources of information, including guides and help topics, and a description of what they contain, to help you set up the configuration that fits your business needs and processes.

Source	Contents
Oracle HCM Cloud Getting Started with Oracle Talent Management Cloud	Provides an overview of Talent Management Cloud options, purchasing and activation options, basic information for implementing Talent Management applications, and describes work areas.
Oracle Talent Management Cloud Implementing Talent Management Base	Describes user and role synchronization, implementation user setup, enterprise and workforce structures, workforce profiles, approvals, help configuration, and more.
Oracle Global Human Resources Cloud Implementing Global Human Resources	Describes user and role synchronization, implementation user setup, enterprise and workforce structures, workforce profiles, approvals, help configuration, and more.
Human Capital Management Cloud Integrating with Oracle HCM Cloud	Describes integration types, how to use file-based and spreadsheet loaders, integrations with Oracle Taleo Recruiting, web services, and coexistence.
Human Capital Management Cloud Securing Oracle HCM Cloud	Describes Oracle Human Management Cloud security, types of roles and how to create them, managing user accounts, types of security profiles and managing them, Oracle Identity

Source	Contents
	Management, and Oracle Fusion Transactional Business Intelligence and Business Intelligence Publisher security.
Oracle Human Capital Management Cloud Creating and Administering Analytics and Reports	Illustrates how to save analytics and reports, describes data structure for analytics, creating and editing analyses, using flexfields in reports, and customizing reports.
Oracle Applications Cloud Using Functional Setup Manager	Describes how to use Functional Setup Manager, setting up security to use it, and describes the Offerings, Features, Business Process, and Related Documents.
Oracle Applications Cloud Extending the Applications for Functional Administrators	Describes page, navigation and Help customization, how to use sandboxes, and how to use flexfields for custom attributes.

Introduction

Chapter	Title	Contents
2	Overview and Integrations	An overview of Oracle Fusion Performance Management implementation and description of how it integrates with other applications.

Questionnaires

Chapter	Title	Contents
3	Questionnaires	Creating questionnaire templates, questionnaires, and questions to use in the Manage Participant Feedback task in a performance evaluation.

Performance Management Settings

Chapter	Title	Task	Contents
4	Descriptive Flexfields	Manage Worker Performance Descriptive Flexfields	Describes the available flexfields for Performance Management and where they are used.

Chapter	Title	Task	Contents
5	Profile Options	Manage Worker Performance Profile Option Values	Describes how to configure the profile options for Performance Management and the effects of the settings.

Performance Management Application Implementation

Chapter	Title	Contents
6	Performance Roles	Creating roles that can access performance documents to provide feedback and enter ratings and comments about a worker.
7	Matrix Management	Configuring roles, process flows, and performance templates to use matrix management.
8	Eligibility Profiles	Creating eligibility profiles to restrict availability of performance documents to a specific population based on criteria you set up.
9	Eligibility Batch Process	Describes how to run the eligibility batch process to determine which performance documents a population of workers is eligible to use for their performance evaluation.
10	Performance Process Flows	Configuring process flows to determine the tasks, and their sequence, used by the performance template for performance evaluations.
11	Performance Template Sections	Configuring sections that are required for the tasks in the process flow, including section type, calculation rules and rating models used in the sections, weighting, and adding content items.
12	Review Periods	Create review periods to link performance management and goal management business objects to measure and achieve results within the review period time line.
13	Performance Document Types	Create performance document types to associate with performance templates to create performance documents, and goal plans to determine which goal plan is used to populate performance documents with goals.

Chapter	Title	Contents
14	Performance Templates	Configuring performance templates used to create performance documents to specify the process flow definition, the sections, and the document type, add review periods, static content, and roles that can access the document.
15	Target Ratings Distribution	Creating 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.
16	Performance and Potential Box Chart Labels	Configuring the box labels for the Performance and Potential box chart by selecting the performance rating model to associate with the box chart and entering labels for each box.

Managing an Implementation

Enabling Offerings: Explained

When planning your implementation, you decide what business processes your organization or company performs or supports. These decisions determine the offerings and functional areas you want to implement. You then configure the offerings and functional areas that support the activities your organization or company performs. During the configuration process, you specifically enable offerings and functional areas for use before you implement them.

Enabling Offerings and Functional Areas

Use the Setup and Maintenance work area to help decide which offerings to enable for implementation. Once you decide to use an offering, you can select the Configure button to choose the configuration details and enable the offering, associated functional areas, and features. All the base functional areas of an offering are automatically enabled for implementation when you enable the parent offering. You choose which optional functional areas to enable. The functional areas appear in an expandable and collapsible hierarchy to facilitate progressive decision making for implementation.

Enabling Features

Features are optional or alternative business rules or methods used to fine-tune business processes and activities supported by an offering or a functional area. If features are available for the offering or functional areas, you can enable them to help meet your business requirements, if desired. In general, the features are set with a default configuration based on their typical usage in most implementations. You should always review the available features for the offering and functional areas and select them as appropriate. Dependent features appear visible when the feature choice they depend on is selected for implementation.

Enabling Offerings: Procedure

You enable offerings to customize the functionality that matches the services you plan on implementing.

Enabling Offerings

To enable offerings, follow these steps.

1. Open the Setup and Maintenance work area (**Navigator > Setup and Maintenance**).
2. In the Setup and Maintenance Offerings page, select the offering you're using, then click **Configure**.
3. In the Configure page, select the **Enable** check box for the offering. Also select the **Enable** check box for each of the functional areas you want to use.
4. Click the Features icon for the offering or functional area you have enabled, then enable any features you require. Select **Done** when complete.
5. Select **Done** to return to the Offerings page then repeat the same steps for each of the offerings you are using.

2 Overview and Integrations

Define Worker Performance: Overview

Use the Define Worker Performance activity to define and maintain the elements used to create performance document templates. Application implementors and human resource (HR) specialists can use these templates to create the performance documents used to rate workers.

To create and manage performance documents, the performance management business activity requires that workers have a manager record.

For both setup and maintenance tasks, implementors and HR specialists can:

- Create document types, sections, process flows, and roles to use in performance document templates.
- Create performance document templates to determine the structure and task flow of performance documents.
- Create default content and target ratings within performance templates and sections.
- Create and edit rating distributions to set the target percentages for worker overall performance ratings for each rating level.
- Create and edit box labels for the Performance and Potential matrix.
- Manage talent eligibility profiles and eligibility batch processes to specify eligibility for performance documents.
- Manage settings for e-mail notifications that the application sends to workers and managers to remind them of upcoming events and tasks.

For setup tasks only, they can also:

- Configure profile options to specify the:
 - Default rating model for Oracle Fusion Performance Management analytics and HR comparisons.
 - Number of years in the past and the future for which to display performance documents to managers and workers based on the document end date.
- Manage descriptive flexfields to add custom attributes to entities, and define validation and display properties for them.
- Manage performance value sets for descriptive flexfields.
- Manage performance lookups, the lists of values that appear in Performance Management pages.

Use the Setup and Maintenance work area to access the tasks in the Define Worker Performance task list. You can also use the Performance Management work area to access the maintenance tasks.

Related Topics

- [Performance Process Flow Setup: Points to Consider](#)
- [Performance Template Section: Critical Choices](#)
- [Setting Up the Performance Template: Critical Choices](#)

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.

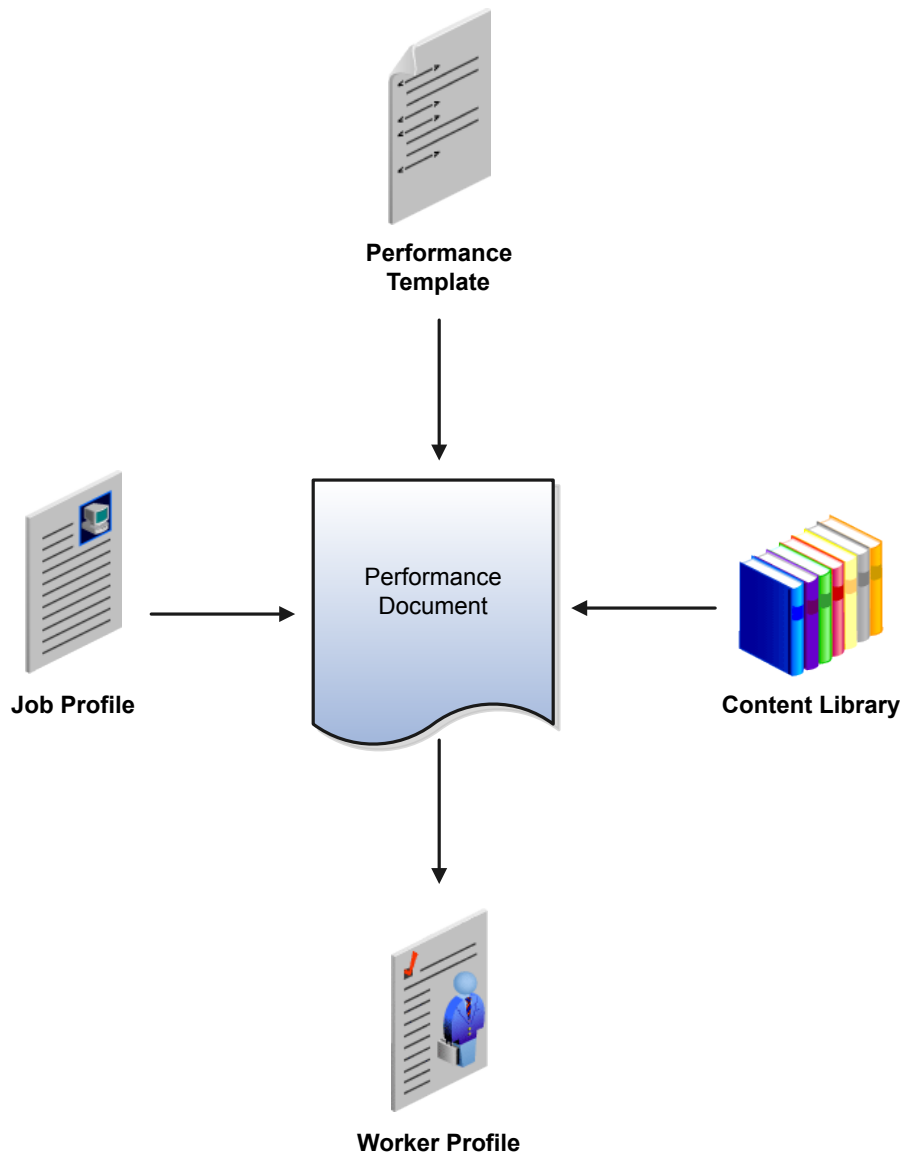
Related Topics

- [Performance Process Flows: Examples](#)
- [Performance Template Section: Critical Choices](#)
- [Setting Up the Performance Template: Critical Choices](#)
- [Creating Performance Documents: Points to Consider](#)

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.

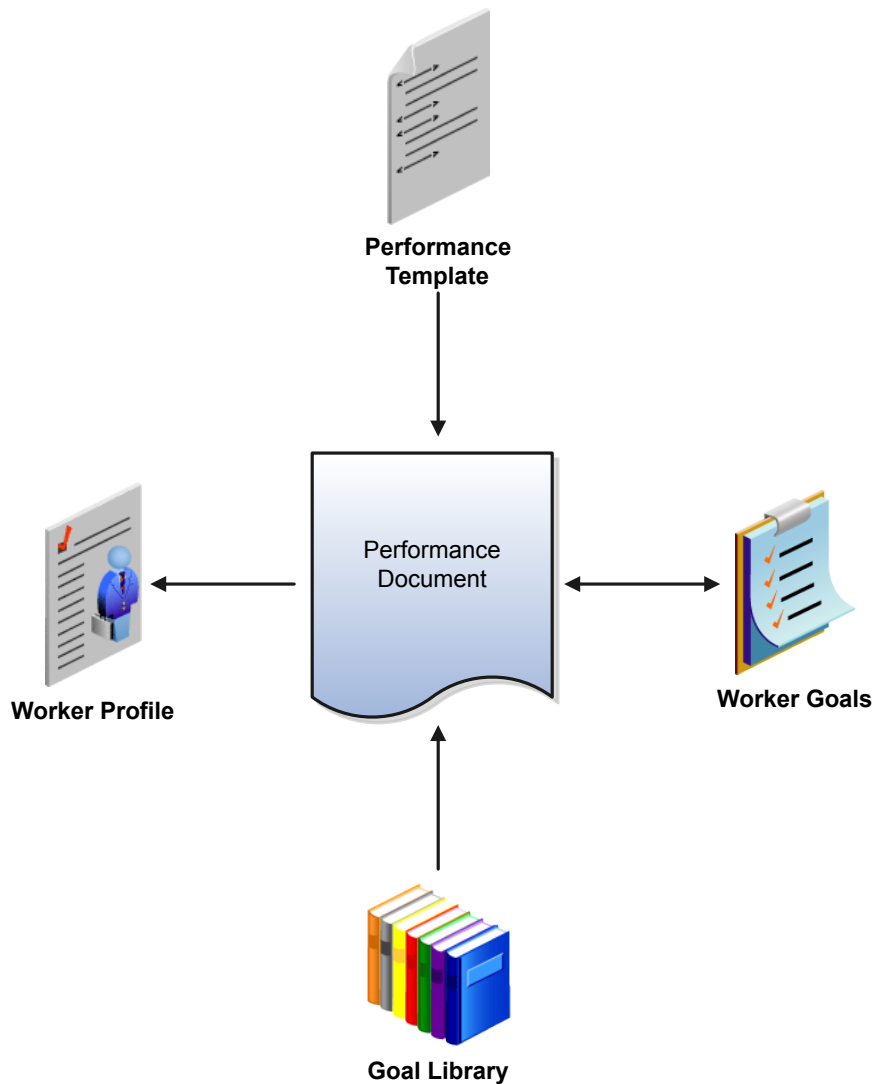
Related Topics

- [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](#)

FAQs for Overview and Integrations

How can I diagnose any issues with Oracle Fusion Performance Management data?

Run the Performance Management Integrity Validations test. In the global area of the Diagnostic Dashboard, select **Settings and Actions - Troubleshooting - Run Diagnostic Tests**. The test generates a report identifying invalid rows, which you can repair or remove.

The test validates that:

- Business groups are valid and exist.
- Foreign key attributes aren't null.
- Field level attributes match the business rules set up in Performance Management.
- Row counts on setup tables are greater than zero.

- Data in the setup tables matches the business rules set up in Performance Management.
- Data in the document tables matches the business rules set up for evaluations in performance documents.

3 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.

Related Topics

- [Participant Feedback: Explained](#)

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
No Sections	One section appears that contains all questions.
Stack Regions	Multiple sections appear as specified on the Section Order option.

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

Value	Description
Sequential	One section appears that contains all questions.
Random	Multiple sections appear as specified on the Section Order 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
Vertical	Questions appear in the specified order.
Random	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.

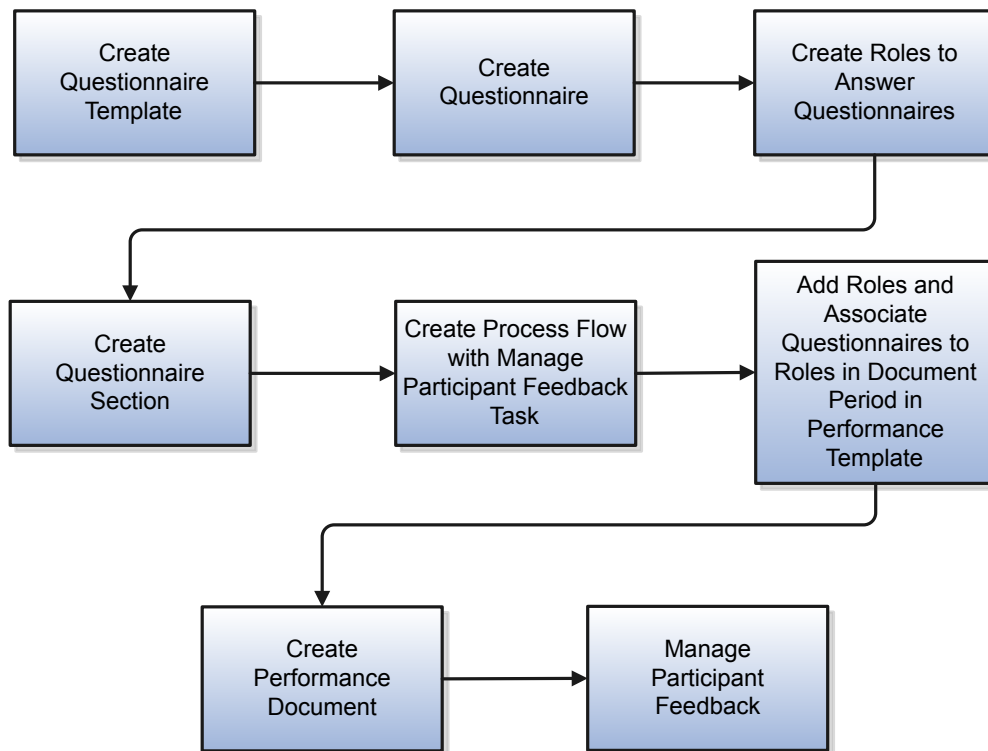
Related Topics

- [Participant Feedback: Explained](#)

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.

Related Topics

- [Participant Feedback: Explained](#)

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.

4 Descriptive Flexfields

Descriptive Flexfields for Oracle Fusion Performance Management


You can use descriptive flexfields to add custom attributes for a Oracle Fusion Performance Management entity, and define validation and display properties for them. For example, you can create a descriptive flexfield for a performance document to ask workers if they are willing to be a mentor.

Defining Descriptive Flexfield Segments

Use the Manage Descriptive Flexfields task to define a segment for a descriptive flexfield for Performance Management. You can add more information related to a Performance Management entity, such as document type, section, performance template, performance template section, and evaluation detail of a performance document.

There are five descriptive flexfields available in Performance Management.

Descriptive Flexfield	Description
HRA_DOC_TYPES_B	Fields for document type displayed on the Create and Edit Performance Document Type pages.
HRA_SECTION_DEFNS_B	Fields for section details displayed in the Details region of the Create and Edit Performance Template Section pages.
HRA_TMPL_DEFNS_B	Fields for performance template details displayed on the General tab of the Create and Edit Performance Template pages.
HRA_TMPL_SECTIONS	Fields for performance template section details displayed on the Structure tab in the Additional Information region of the Create and Edit Performance Template pages.
HRA_EVALUATIONS	Fields for evaluation details used in a performance evaluation displayed in the Additional Information region of a performance document.

 **Note:** Descriptive flexfields HRA_EVAL_ITEMS and HRA_EVAL_RATINGS in Performance Management are not currently in use.

Activating Descriptive Flexfields

To activate a descriptive flexfield, you must also define lookup codes and value sets along with the descriptive flexfield segment. For more information on using flexfields for custom attributes, see the Oracle Fusion Applications Extensibility Guide.

Related Topics

- [Descriptive Flexfields: Explained](#)
- [Flexfields: Overview](#)

5 Profile Options

Oracle Fusion Performance Management Profile Options: Critical Choices

Set profile options for Oracle Fusion Performance Management to define the rating model used in analytics and worker comparisons, the range of years of performance documents to display, and autosave interval. You can only change the Site Level settings for each.

To manage profile options, use these tasks in the Setup and Management work area:


- Manage Administrator Profile Values
- Manage Worker Performance Profile Option Values

Default Rating Model for Performance Management Analytics

The value of the profile option Default Rating Model for Performance Management Analytics (Profile Option Code: HRA_DEFAULT_RATING_MODEL) defines the rating model that performance documents use for the ratings that display in analytics and comparisons of workers. The worker's overall rating for the latest performance document using the profile value is displayed on the pages of other business processes. You can use it to make comparisons between workers or a worker's past and present ratings.

The ratings and comparisons can appear in the:

- Box chart matrix on the Oracle Fusion Talent Review meeting dashboard
- Rating History analytic on the Skills and Qualifications tab in Person Spotlight
- Compare feature
- Performance and Potential box chart in the Promotion business process

 **Note:** The overall ratings that appear in the following locations are those taken from the performance document that the manager selects to view on the My Organization page in the Performance work area:

- Performance and Potential box chart
- Rating Distribution analytic
- My Organization Performance Summary table on the My Organization page

These overall ratings may not use the profile option rating model. The Rating History analytic that appears on the performance document pages displays the history for the other performance documents using the same performance template as the performance document.

Number of Years of Performance Documents to Display

Specify the number of years of completed and not started performance documents that appear to managers on the My Manager Evaluations page, and to workers on the My Evaluations page. The setting also determines the range of years of performance documents that appear on choice lists where HR specialists access performance documents. By specifying a low number, you can prevent workers and managers from having to sort through a long list of past and future documents.

You specify two different profile options to determine the number of years of performance documents to display. The table shows the two settings and the effects of specifying the values.

Profile Option Code	Profile Display Name	Effect	Default
HRA_PD_DISPLAY_FUTURE_YRS	Number of future years from the current date	Determines how many years ahead of the current date to display performance documents. This includes all performance documents with an end date that's within the range of the future date. For example, if the value is 2, and the current date is January 1, 2015, documents with an end date equal to or before January 1, 2017, can appear on the list.	2
HRA_PD_DISPLAY_PAST_YRS	Number of past years from the current date	Determines how many years before the current date to display performance documents. This includes all performance documents with an end date that's within the range of the past date. For example, if the value is 3, and the current date is January 1, 2015, documents with an end date equal to or after January 1, 2012, can appear on the list.	3

The value you select affects the range in years of documents on choice lists that appear on the following pages:

- Manage Eligibility Batch Process
- Manage Performance Document Eligibility

Regardless of the profile option settings, in progress documents always appear in the performance document choice lists.

Managers, workers, and HR specialists can still use search for and access performance documents that fall outside the specified number of years.

Performance Autosave Interval

This table shows the profile option that determines the autosave interval in performance documents.

Profile Option Code	Profile Display Name	Effect	Default
HRA_PERF_AUTOSAVE_INTERVAL	Performance Autosave Interval	Indicates the number of minutes before the performance document saves automatically.	10

Related Topics

- [Rating Models: Explained](#)

- Performance Information in Comparison Results: Explained
- Autosaving Performance Documents: Explained

FAQs for Profile Options

What happens when I enter the default rating model profile option?

The overall ratings appear where performance ratings are compared between workers, or between a worker's past and present ratings, for workers rated using the default rating model. You can select either a rating model you create, or a predefined one, as the default rating model.

The rating comparisons can appear in the:

- Performance and Potential box chart on the My Organization page in the Performance Management work area
- My Organization Performance Summary on the My Organization page in the Performance Management work area
- Box charts that use performance ratings on the Oracle Fusion Talent Review meeting dashboard

The ratings must be provided in performance documents created from performance templates using the default rating model to appear on the Performance Manager Overview page. The ratings can be provided in the performance document, or during a talent review, to appear on the Talent Review meeting dashboard.

6 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.

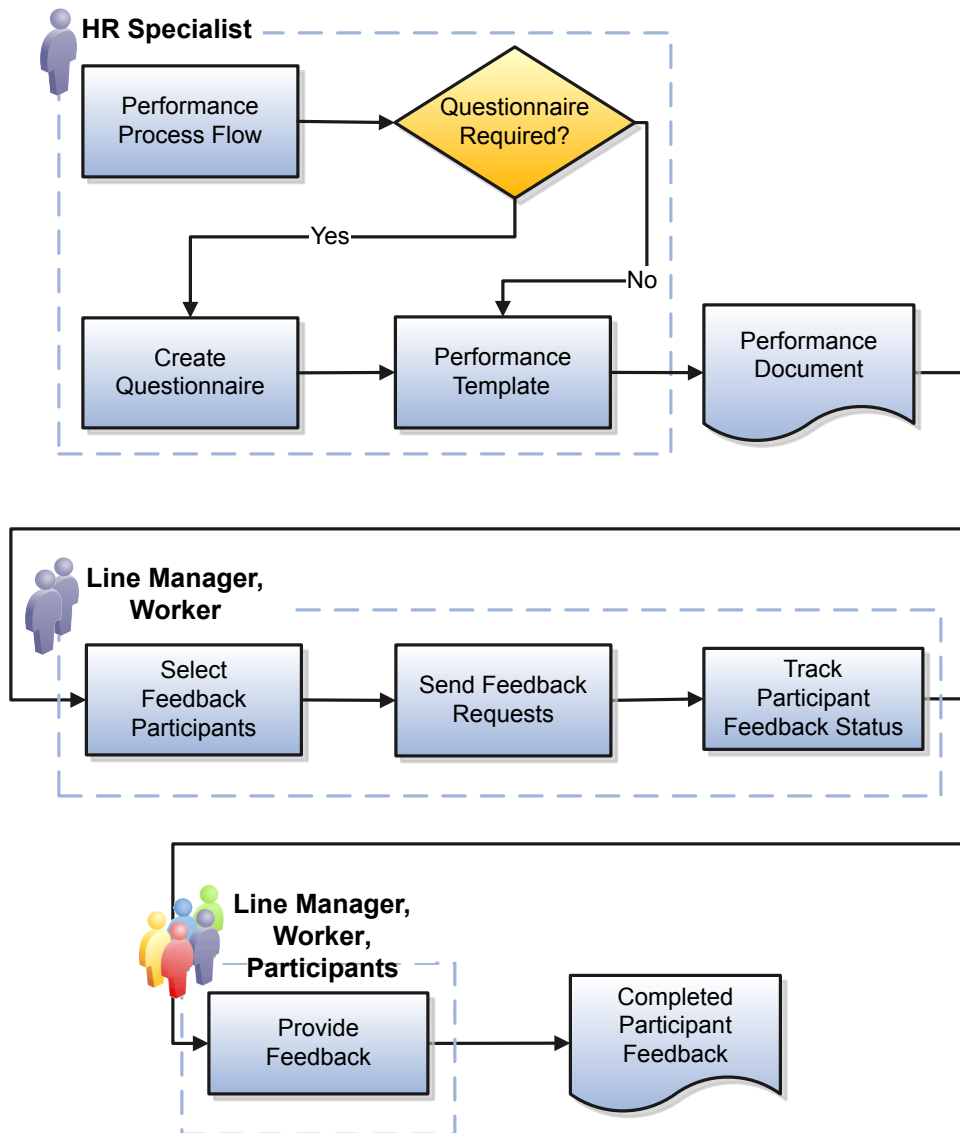
Participant Feedback: Explained

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.

Related Topics

- [Using Questionnaires in Performance Documents: Explained](#)
- [Performance Documents and Questionnaires: How They Work Together](#)


7 Matrix Management

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.

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	Yes to share comments with worker	Yes to let manager view participant name, No to display participants only as Participant	Yes to let manager view participant role, No to display participant roles as Participant
Worker		Yes to share comments with worker	Yes to let worker view participant name, No to display participants only as Participant	Yes to let worker view participant name, No to display participants only as Participant
Matrix Manager	Yes to share ratings with worker	Yes to share comments with worker	Inherits Manager setting	Inherits Manager setting
Participants	Yes to share ratings with worker	Yes 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

- [Creating a Performance Template: Worked Example](#)

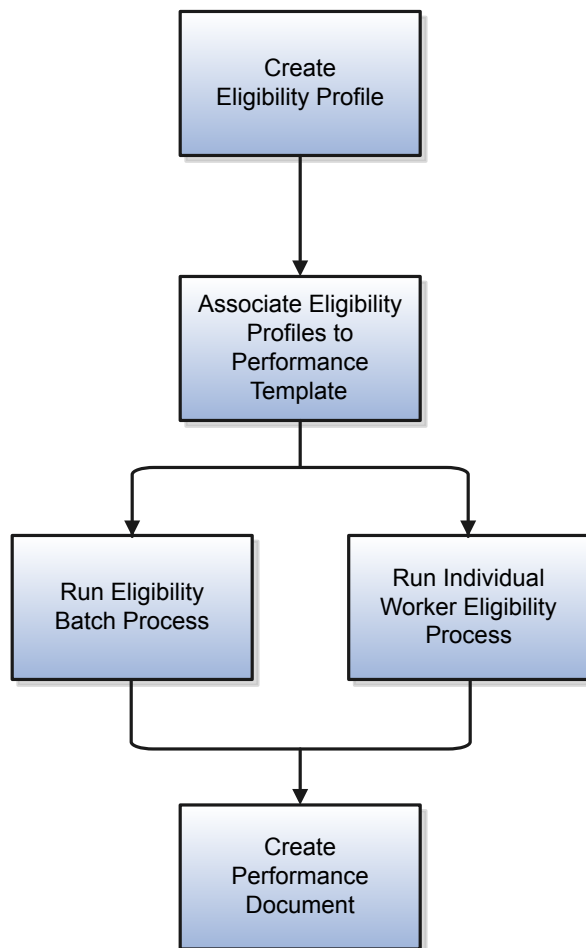
- Performance Roles: Explained
- Performance Process Flow Setup: Points to Consider

8 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](#)

- Performance Document Eligibility Batch Process: Explained
- Eligibility Profiles: 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 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.

9 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"> • Worker assignments on that date. • 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. <p>For scheduled processes, select Current Date 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.

Parameter	Description
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">• Number for future years from the current date• Number of past years from the current date <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	<p>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.</p>
Performance Document End Date	<p>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.</p>

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

10 Performance Process Flows

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"> • Can track the worker self-evaluation to view any changes the worker makes to the performance document

Task	Subtask	Role that Performs Task	Task Function
			<ul style="list-style-type: none"> Can't view the ratings and comments the worker provides until the worker completes the subtask
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"> Share and edit, to share the document with the worker while continuing to edit the document. Share and release, the document to share the document with the worker but no longer edit it. <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 1: Manager Subtask 2: Worker	After the worker and manager meet to discuss the evaluation, the manager indicates that the

Task	Subtask	Role that Performs Task	Task Function
	Subtask 2: Acknowledge Review Meeting		meeting was conducted, then the worker acknowledges that the meeting took place.
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.
	Subtask 2: Manager Provides Final Feedback	Subtask 2: Manager	
			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.
Set Next Period Goals		Manager, worker, or both	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.
		The roles are those specified for the Set Goals task for the performance document for the subsequent period.	

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.

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

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.

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.

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">• Share and Retain• Share and Release
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">• 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.• 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.
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	

Task	Roles	Valid Statuses	Has Subtasks?
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	
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
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

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

Performance Document Approvals

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.

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 Approve or Reject 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.

11 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: <ul style="list-style-type: none"> • Profile Content • Goals
Set Next Period Goals	
Worker Self-Evaluation	At least one of: <ul style="list-style-type: none"> • Profile Content • Goals • Overall Summary
Manager Evaluations of Workers	

Task	Required Section
Manage Participant Feedback	At least one of: <ul style="list-style-type: none"> • Profile Content • Goals • Overall Summary • Questionnaire
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

Related Topics

- [Creating a Performance Template: Worked Example](#)

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
Standard	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.
Up	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
Down	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
Highest	Uses the next numeric rating greater than the calculated average.	Uses the next review point greater than the calculated average.
Lowest	Uses the next numeric rating less than the calculated average.	Uses the next review point less than the calculated average.
Nearest	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.

Related Topics

- [Creating a Performance Template: Worked Example](#)

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.

Related Topics

- [Rating Models: Explained](#)

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
Target Proficiency Level	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.
Target Performance Rating	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.
Weight	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.
Minimum Weight	You can enter minimum weights for items in the performance template. In the performance document, managers can edit the minimum weights.
Required	In the performance template section or the performance template, select the Required 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.

Related Topics

- [Rating Models: Explained](#)

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
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:

$(\text{Total Decimal Score}) / (\text{Total Maximum Decimal Score}) \times (\text{Maximum Numeric Rating from Section Rating Model})$, 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

Competency	Item Numeric Rating	Maximum Numeric Rating from Rating Model	Decimal Score (Item Rating / Maximum Rating)	Weight	Weighted Score (Decimal Score x Weight)
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
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:

$(\text{Weighted Score}) / (\text{Total Maximum Weighted Score}) \times (\text{Maximum Numeric Rating from Section Rating Model})$, 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.

Related Topics

- [Creating a Performance Template: Worked Example](#)

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

Rating Level	Numeric Rating
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
3--Average	30

Rating Level	Numeric Rating
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.

Related Topics

- [Creating a Performance Template: Worked Example](#)

Writing Assistant: Explained

Writing Assistant is a tool that provides suggestions for a manager when writing comments or feedback for a worker's competency or rating level during performance evaluation. Writing Assistant suggests statements associated with competencies and proficiency levels within those competencies, to help describe a worker's observed and wanted actions. The Writing Assistant data is displayed in the form of feedback suggestions and development tips. Use the **Export** option on the Manage Content Items page in the Profiles work area to generate the spreadsheet for uploading writing assistant data.

Requirements for Using Writing Assistant Data

To use Writing Assistant, human resource specialists must upload data associated with a competency using an application-generated spreadsheet. The application enables suggestions only for those competencies that have a rating. Using Writing Assistant, managers can select a proficiency level for a competency, view suggested comments for the selected proficiency level or for the competency as a whole, and copy and edit the suggested comments.

Related Topics

- Writing Assistant: How it Works with Performance Documents
- Setting Up the Performance Template: Critical Choices

Uploading Writing Assistant Data Using a Spreadsheet: Explained

Human resource (HR) specialists can upload and associate new Writing Assistant data for competencies using an application-generated spreadsheet. Use the **Export** option on the Manage Content Items page in the Profiles work area to generate the spreadsheet for uploading writing assistant data. The uploaded data is associated with each separate competency.

The application-generated spreadsheet for uploading Writing Assistant data contains the following two worksheets:

- Feedback Suggestions - Upload feedback suggestions for each proficiency level for each competency.
- Development Tips - Upload development tips associated for each competency.

Spreadsheet Generation

You can generate the spreadsheet to upload and associate Writing Assistant data with competencies as follows:

1. Navigate to the **Manage Content Items** page from the Setup and Maintenance work area by querying on the **Manage Profile Content Items** task and selecting **Go to Task**.
2. In the **Search Results** region, click the **Export** icon and select the **Writing Assistant Excel Template** action. A **File Download** dialog box appears.
3. Click **Save**. Select a destination on your local hard disk to save the CompetencyFeedbackSuggestion.xlsx spreadsheet.

Upload and Update Feedback Suggestions

To upload feedback suggestions, specify all the required columns in the Feedback Suggestions worksheet and click **Upload**. After you click **Upload**, click **Save** to commit the feedback suggestions for proficiency levels for associated competencies into the Fusion HCM database.

To update an existing feedback suggestion, click **Download** to download all feedback suggestions for competencies into the spreadsheet. You can then update the suggested text and click **Upload**. After you click **Upload**, click **Save** to commit the feedback suggestions for proficiency levels for associated competencies into the Fusion HCM database.

 **Note:** You can enter the same suggestion text for multiple competencies and for multiple proficiency levels.

Upload and Update Development Tips

To upload development tips, specify all the required columns in the Development Tips worksheet and click **Upload**. After you click **Upload**, click **Save** to commit the development tips for associated competencies into the Fusion HCM database.

To update an existing development tip, click **Download** to download all development tips for competencies into the spreadsheet. You can then update the suggested text and click **Upload**. After you click **Upload**, click **Save** to commit the updated development tips for associated competencies into the Fusion HCM database.

 **Note:** You can enter the same suggestion text for multiple competencies.

Related Topics

- [Writing Assistant: How it Works with Performance Documents](#)
- [Using Desktop Integrated Excel Workbooks: Points to Consider](#)

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
What properties are included with the content items?	Weight, Required, Target Proficiency Level
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
Name	Competencies
Description	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.
From Date	01/01/2011
To Date	12/31/2015
Status	Active

4. Click **Save**.

Entering Section Processing Details

1. In the **Section Processing** region, complete the fields, as shown in this table.

Field	Value
Section Type	Profile Content
Rate Section	Select
Calculation Rule for Section	Average
Decimal Places	2
Decimal Rounding Rule	Standard
Mapping Metric	Numeric Rating
Mapping Method	Nearest
Section Rating Model	Any

Field	Value
Weight section	Select
Item Weight	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
Enable items	Select
Add and remove items during task to set goals	Select
Rate items	Select
Rating Type	Proficiency
Use section rating model for performance rating	Select
Item Calculation	Proficiency
Weight	Select
Required	Select
Target Proficiency Level	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
Use profile related to worker's job data	Select
Profile Type	Job profile type
Use specific content items	Select
Enable writing assistant for manager	Select

- In the **Content Items** region, click **Add**.
- In the **Content Items** region, complete the fields, as shown in this table. Use the default values except where indicated.

Field	Value
Item Name	Any
Target Proficiency Level	Any
Weight	Any
Required	Select

- 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

Decisions to Consider	In This Example
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
Name	Goals
Description	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.
From Date	01/01/2011

Field	Value
To Date	12/31/2015
Status	Active

4. Click **Save**.

Entering Section Processing Details

1. In the **Section Processing** region, complete the fields, as shown in this table.

Field	Value
Section Type	Goals
Rate Section	Select
Calculation Rule for Section	Average
Decimal Places	2
Decimal Rounding Rule	Standard
Mapping Metric	Numeric Rating
Mapping Method	Nearest
Section Rating Model	Any
Weight section	Select
Section Weight	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
Enable items	Select
Add and remove items during task to set goals	Select
Rate items	Select
Use section rating model for performance rating	Select
Target Performance Level	Select
Weight	Select
Required	Select
Description	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
Populate with Worker Goals	Select
Use specific content items	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
Item Name	Any
Performance Rating Model	Any
Target Performance Rating	Any

Field	Value
Weight	Any
Required	Select

4. Click **Save**.

12 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](#)

13 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

- [Interim Evaluations in Performance Documents: Explained](#)
- [Goal Plans: Explained](#)

14 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.

Related Topics

- [Performance Template Section Calculation Rules: Critical Choices](#)
- [Creating a Profile Content Performance Template Section: Worked Example](#)

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](#)
- [Configuring Performance Documents to Display Performance Ratings to Workers: Critical Choices](#)

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.

Related Topics

- [Performance Documents and Questionnaires: How They Work Together](#)

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.

Related Topics

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

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
Use the performance template for more than one period?	Yes, set up two performance document periods

Decisions to Consider	In This Example
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
Name	Annual Performance Evaluation
Comments	This template is used for an annual performance evaluation.

Field	Value
From Date	01/1/15
To Date	12/31/20
Status	Active
Document Type	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
Eligibility Profile	Any
Required	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
Set the minimum number for each role check box	Select
Total minimum number of participants required in the document	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
Process Flow	The process flow you created as a prerequisite for this task.
Calculate ratings	Select
Display star ratings	Select
Include digital signature	Select
Display kudos	Select
Participant feedback is required	Select
Worker can view participants added by manager	Select
Auto-populate matrix managers of the worker as participants	Select
Default participant role	Matrix Manager
Allow matrix managers to access worker document automatically	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
Section Type	Profile Content
Rate Section	Select
Calculation Rule for Section	Average
Section Rating Model	Any
Weight section	Select
Section Weight	40

4. In the Item Processing section, complete the fields as shown in this table. Use the default values except where indicated.

Field	Value
Enable items	Select
Add and remove items during task to set goals	Select
Enable ratings for items	Select
Use section rating model for performance rating	Select
Item Calculation	Any
Target Performance Rating	Select
Weight	Select
Required	Select
Target Proficiency Level	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
Role	Manager

Field	Value
Share Ratings	Yes
Share Comments	Yes
Update Profile	Yes
Person Profile Type	Any
Instance Qualifier Set	Evaluation Type
Instance Qualifier	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
Role	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
Section Type	Goals
Rate Section	Select
Calculation Rule for Section	Average
Section Rating Model	Any
Weight section	Select
Section Weight	60

4. In the Item Processing section, complete the fields as shown in this table. Use the default values except where indicated.

Field	Value
Enable items	Select
Add and remove items during task to set goals	Select
Enable ratings for items	Select
Use section rating model for performance rating	Select
Item Calculation	Any
Target Performance Rating	Select
Weight	Select
Required	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
Role	Manager
Share Ratings	Yes
Share Comments	Yes
Update Profile	Yes
Person Profile Type	Any
Instance Qualifier Set	N/A
Instance Qualifier	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
Role	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
Role	Manager
Manager Questionnaire Can Be Viewed by the Role	Yes
Worker Questionnaire Can Be Viewed by the Role	Yes
Participant Questionnaire Can Be Viewed by the Role	Yes
Participant Name Can Be Viewed by the Role	Yes
Show Role on Feedback Review Page	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
Role	Worker
Manager Questionnaire Can Be Viewed by the Role	No
Worker Questionnaire Can Be Viewed by the Role	Yes

Field	Value
Participant Questionnaire Can Be Viewed by the Role	No
Participant Name Can Be Viewed by the Role	No
Show Role on Feedback Review Page	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
Role	Colleague
Participant Role Can Enter Comments Visible to Worker	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
Section Type	Overall Summary
Rate Section	Select
Calculation Rule for Section	Average
Section Rating Model	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
Role	Manager
Share Ratings	Yes
Share Comments	Yes
Update Profile	Yes
Person Profile Type	Any
Instance Qualifier Set	N/A
Instance Qualifier	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
Role	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
Section Type	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
Role	Manager

Field	Value
Share Comments	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
Role	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
Section Type	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
Role	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
Role	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
Section Name	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
Item Name	Any

4. In the Details section, complete the fields as shown in this table. Use the default values except where indicated.

Field	Value
Target Proficiency Level	Any
Performance Rating Model	Any
Required	Select

5. On the Content tab, complete the fields as shown in this table.

Field	Value
Section Name	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
Item Name	Any

8. In the Details section, complete the fields as shown in this table. Use the default values except where indicated.

Field	Value
Performance Rating Model	Any
Target Performance Rating	Any
Required	Select

9. Click **Save**.

Adding Document Periods

1. On the Document Periods tab, in the Document Periods section, click **Add**.
2. In the Document Periods section, complete the fields as shown in this table.

Field	Value
Name	2015 Performance Evaluation First Half
Review Period	FY2015
From Date	1/1/15
To Date	6/30/15
Short Name	Any
Available to Use	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
Eligibility Profile	Any

4. In the Due Dates section, complete the due date for each task as shown in this table.

Task	Due Date
Set Goals	6/24/15
Worker Self-Evaluation	7/1/15
Manager Evaluation of Workers	7/8/15
First Approval	7/15/15
Share Performance Documents	7/20/15
Conduct Meetings	7/25/15
Provide Final Feedback	7/30/15
Set Next Period Goals	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
Template Role	Manager
Questionnaire Name	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
Name	2015 Performance Evaluation Second Half
Review Period	FY2015
From Date	7/1/15
To Date	12/31/15
Short Name	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
Set Goals	12/23/15
Worker Self-Evaluation	1/8/16
Manager Evaluation of Workers	1/15/16
First Approval	1/18/16
Share Performance Documents	1/21/16
Conduct Meetings	1/24/16
Provide Final Feedback	1/31/16
Set Next Period Goals	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
Template Role	Manager
Questionnaire Name	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.

15 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
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.

16 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.

Related Topics

- [Rating Models: Explained](#)

Glossary

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.

descriptive flexfield

Customizable expansion space, such as fields used to capture additional descriptive information or attributes about an entity, such as a customer case. You may configure information collection and storage based on the context.

document type

A categorization of person documents that provides a set of options to control what document information to retain, who can access the documents, whether the documents require approval, and whether the documents are subject to expiry. A document type exists for a combination of document category and subcategory.

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.

instance qualifier set

A set of values that uniquely identifies multiple instances of the same profile item.

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.

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.

talent review

A series of meetings where organization managers evaluate trends, assess strengths, and address areas of risk for the organization.