

Oracle® Fusion Applications Workforce Development Guide

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Preface

This Preface introduces the guides, online help, and other information sources available to help you more effectively use Oracle Fusion Applications.

Oracle Fusion Applications Help

You can access Oracle Fusion Applications Help for the current page, section, activity, or task by clicking the help icon. The following figure depicts the help icon.



With a local installation of help, you can add custom help files to replace or supplement the provided content. Help content patches are regularly made available to ensure you have access to the latest information. Patching does not affect your custom content.

Oracle Fusion Applications Guides

Oracle Fusion Applications guides are a structured collection of the help topics, examples, and FAQs from the help system packaged for easy download and offline reference, and sequenced to facilitate learning. You can access the guides from the **Guides** menu in the global area at the top of Oracle Fusion Applications Help pages.

Note

The **Guides** menu also provides access to the business process models on which Oracle Fusion Applications is based.

Guides are designed for specific audiences:

- **User Guides** address the tasks in one or more business processes. They are intended for users who perform these tasks, and managers looking for an overview of the business processes. They are organized by the business process activities and tasks.
- **Implementation Guides** address the tasks required to set up an offering, or selected features of an offering. They are intended for implementors. They are organized to follow the task list sequence of the offerings, as displayed within the Setup and Maintenance work area provided by Oracle Fusion Functional Setup Manager.
- **Concept Guides** explain the key concepts and decisions for a specific area of functionality. They are intended for decision makers, such as chief financial officers, financial analysts, and implementation consultants. They are organized by the logical flow of features and functions.

- **Security Reference Manuals** describe the predefined data that is included in the security reference implementation for one offering. They are intended for implementors, security administrators, and auditors. They are organized by role.

To supplement these guides, which cover specific business processes and offerings, the following guides address common areas:

Other Information Sources

My Oracle Support

Oracle customers have access to electronic support through My Oracle Support. For information, visit <http://www.oracle.com/pls/topic/lookup?ctx=acc&id=info> or visit <http://www.oracle.com/pls/topic/lookup?ctx=acc&id=trs> if you are hearing impaired.

Use the My Oracle Support Knowledge Browser to find documents for a product area. You can search for release-specific information, such as patches, alerts, white papers, and troubleshooting tips. Other services include health checks, guided lifecycle advice, and direct contact with industry experts through the My Oracle Support Community.

Oracle Enterprise Repository for Oracle Fusion Applications

Oracle Enterprise Repository for Oracle Fusion Applications provides visibility into service-oriented architecture assets to help you manage the lifecycle of your software from planning through implementation, testing, production, and changes. In Oracle Fusion Applications, you can use the Oracle Enterprise Repository for Oracle Fusion Applications for:

- Technical information about integrating with other applications, including services, operations, composites, events, and integration tables. The classification scheme shows the scenarios in which you use the assets, and includes diagrams, schematics, and links to other technical documentation.
- Publishing other technical information such as reusable components, policies, architecture diagrams, and topology diagrams.

The Oracle Fusion Applications information is provided as a solution pack that you can upload to your own deployment of Oracle Enterprise Repository for Oracle Fusion Applications. You can document and govern integration interface assets provided by Oracle with other assets in your environment in a common repository.

Documentation Accessibility

For information about Oracle's commitment to accessibility, visit the Oracle Accessibility Program website at <http://www.oracle.com/us/corporate/accessibility/index.html>.

Comments and Suggestions

Your comments are important to us. We encourage you to send us feedback about Oracle Fusion Applications Help and guides. Please send your suggestions to oracle_fusion_applications_help_ww@oracle.com. You can use the **Send Feedback to Oracle** link in the footer of Oracle Fusion Applications Help.

Manage Workforce Profiles

Manage Talent Profiles

Managing Talent Profiles: Overview

In the Manage Talent Profiles activity, managers and HR specialists can maintain information within person profiles about the skills, qualifications, accomplishments, and career preferences of their workers. They can also maintain information in model profiles about the targeted skills and qualifications of the jobs and positions within the company. Worker can use the Manage Talent Profiles activity to manage their own careers by keeping their talent profiles current so that their skills, qualifications, accomplishments, and career preferences reflect their current performance and future career goals.

Many of the tasks in this activity are accomplished using the profile cards on portraits in the gallery. HR specialists and managers can view and update information on the profile cards of their workers, and workers can update their own cards.

This table lists the profile cards and some of the features of each card when used by managers and HR specialists viewing the cards of their workers, and when used by workers viewing their own cards.

Card	Features for Managers and HR Specialists	Features for Workers
Development and Growth	<ul style="list-style-type: none"> Use the competency gaps chart to compare the competencies of a worker to that of a job from his interest list to identify whether he is a suitable candidate for the job or needs further training. Review and edit performance and development goals. 	<ul style="list-style-type: none"> Use the competency gaps chart to compare their competencies to that of a job from their interest list to identify whether they are a suitable candidate for a job or to identify training needs. Create a career statement to identify career goals.

Career Planning	<ul style="list-style-type: none"> • Add jobs or positions to the interest lists of their workers. • Review career preference information for workers, such as job or job family of their next career move. • Review and edit talent ratings such as performance and potential of workers, and the risk and impact of losing them. 	<ul style="list-style-type: none"> • Add jobs or positions to their interest lists. • View the suggestions list and determine whether to add any of the suggested jobs or positions to their interest list. • Identify career preferences such as the job or job family of their next career move.
Experience and Qualifications	<ul style="list-style-type: none"> • Review areas of expertise and other qualifications for workers. • Review performance documents for workers. 	<ul style="list-style-type: none"> • Identify areas of expertise, such as a specific software package. • Review performance documents. • Maintain competencies, degrees, and other accomplishments.

Within the portrait gallery, managers, HR specialists, and workers can all access the comparison and best-fit analysis tools to:

- Compare profiles of jobs and workers to find suitable workers for a job, or suitable jobs for a worker.
- View a side-by-side comparison of workers and jobs.

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

Compare Profiles and Find the Best Fit

Comparing Items: Explained

Use comparison to quickly identify and evaluate differences between items. Compare any person, job, and position items. For example, you can compare a person with another person or with a job profile.

The first item you select is the comparison base, and the items you select subsequently are secondary items. You can change the comparison base if required. The comparison displays the base item attributes, and indicates the differences between the attributes of the secondary items and the base items. Datasets control which attributes are displayed for each item in the comparison. For example, you must select the School Education dataset to display and compare a person's education details. The information displayed in the comparison results is controlled by security access. For example, line

managers can compare their direct reports and view their performance data in the comparison results. Human resource (HR) specialists can perform this comparison only if they have security access to the persons' performance information. You can change the effective date of comparison if you are either a line manager or an HR specialist.

Performance Information in Comparison Results: Explained

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

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

Best Fit: How It Is Calculated

The best-fit analysis compares the content items within each content type on a selected profile to determine the profiles that are the closest match. For example, you can use the best-fit analysis to find the person profiles of workers who are best suited for a selected job profile. After reviewing an initial list of the profiles that have the highest percentage of matching qualities, you can narrow the results by changing the priority of content types or individual content items, and by viewing the percentage match for each content type.

How Best Fit Is Calculated

The best-fit analysis is based on how well the content items of the selected profile match the same content items in other profiles. The best-fit analysis includes content items of these predefined content types:

- Competencies
- Honors and awards
- Work requirements
- Languages
- Degrees
- Memberships
- Licenses and certifications

The initial calculation for the best-fit analysis totals the importance values for all content items for the included content types. The default value on the person, job, and position profile types for the **Importance** field is 2. You can change the value at the profile type level or at the content item level. If you want to change the default value at the content item level, you must first change the display setting for the **Importance** field so that you can edit the field.

The targeted proficiency ratings for content items on a model profile and the proficiency ratings on person profiles also affect the best-fit analysis. Content items with higher ratings are given a higher weight.

Best-Fit Analysis: Examples

Use the best-fit analysis to find the profiles that most closely match a selected profile. You select a person or model profile as a source profile, and then the analysis finds the profiles that best match the source profile. The best-fit analysis is based on how well the profile items (content items) within the content types match that in the source profile.

Person Profiles that Match a Model Profile

Using a person profile as the source profile, you can perform a find best-fit job analysis to view a list of model profiles that are best suited for a worker. For example, as a manager, you might use this tool to help a worker manage his next career move by identifying job profiles that he is best suited for.

Model Profiles that Match a Person Profile

Using a model profile such as a job as the source profile, you can perform a find best-fit person analysis to view a list of workers who are best suited for a job. For example, as a human resources (HR) specialist, you might use this tool to help locate the most qualified workers for a job opening within your company.

Person Profiles that Match a Person Profile

Using a person profile as the source profile, you can perform a find best-fit person analysis to locate workers with skills that match that of a particular worker. For example, your company is planning to launch new technology. You know of one worker who has the required skill to use the new technology. To assess the scope of workers who will need development in this particular skill, you can select the worker's profile and perform a find best-fit person analysis to view a list of other workers who may come close to the skill requirements.

Model Profiles that Match a Model Profile

Using a model profile as the source profile, you can perform a find best-fit job analysis to locate model profiles that match the model profile. For example, as an HR Specialist, you might want to identify areas for outplacement, training requirements, or areas of organizational strength.

FAQs for Compare Profiles and Find the Best Fit

How are the differences between comparison attributes identified?

The differences are calculated between the attributes of the secondary items and the base item. Differences between numeric values are calculated and displayed; character differences are indicated using an icon. Where the data includes a range (competency ratings, for example), the comparison displays the differences from each end of the range. Also, the comparison does not display the differences for those values that lie within the range. For example, consider that you are comparing the competency requirements of two job profiles. The competency requirement of the base job is between 2 and 4 and the secondary job is between 1 and 3. The comparison displays the difference between the

minimum competency requirement of the secondary job (1) and the base job (2) as -1. The comparison does not display the difference between the maximum values because the maximum competency requirement of the secondary job (3) lies within the competency requirement of the base job (between 2 and 4).

How is the risk of loss assessed?

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

Can I add additional datasets to the comparison?

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

What happens if I remove the comparison base?

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

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

Perform a best-fit analysis to find matching profiles for a specified profile using a wide variety of criteria. For example, use best-fit analysis to find the top five person profiles matching a job profile, based on competency requirements, language skills, and certifications. Compare profiles to evaluate the similarities and differences between known profiles and identify the most suitable profiles. For example, compare the five person profiles identified by the best-fit analysis and identify the person most suited to the job.

Create and Update Profiles

Model Profiles: Explained

Model profiles identify the competencies, qualifications, and experience required for a workforce structure, such as a job or position.

The profile type that you select for the model profile determines the information that you complete for the profile.

Workforce Structure

Associate the model profile with a workforce structure. The available workforce structures depend on how the profile type is defined. For example, if the profile type was defined for jobs and positions, then you can associate the model profile with a job or a position. You can associate the model profile with more than one workforce structure. Associating model profiles with jobs and positions enables you to define for the job or position the competencies, degrees, and other skills that are required.

Requirements

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

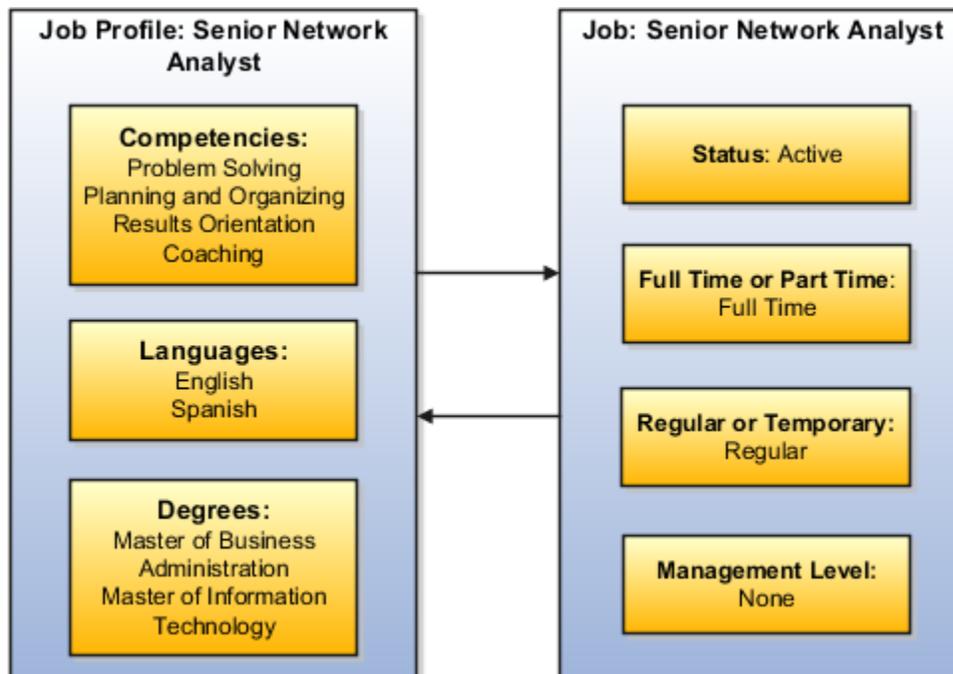
Performance Document Information

When you define the content items for the Competencies content type, you can define a weight, minimum weight, and whether the competency is required. These properties are used as default settings for the items when you copy the competencies from the model profile to a template section used to create a performance document. The weight and minimum weight determine the relative value of each competency to others in the section. If a competency is required, then workers and managers cannot delete it from the performance document.

Model Profiles: How They Work with Jobs and Positions

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

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



Associating a Model Profile with a Job or Position

Model profiles are based on profile types, and the profile type determines what you can assign to the model profile. For example, if you create a model profile using a profile type that was defined for use only with jobs, then you can associate only a job with the model profile. If the profile type was defined for use with jobs and positions, then you can associate a job or a position with the profile. You can associate multiple jobs and positions with a profile.

You can also set up an association between a model profile and a job or position using the Manage Jobs and Manage Positions tasks.

FAQs for Create and Update Model Profiles

What's a competency gap chart?

A competency gap chart is a graphical representation of how well your competency ratings match the required proficiency ratings of a job or position profile. The job or position profiles to which you can compare your profile include your assignments and the profiles in your interest list. The competency gap chart is generated using only those competencies that appear in both your profile and the selected job or position profile.

Use the competency gap chart as part of your career development to determine whether you are already qualified for the selected job or position, or if areas exist where you need further development. For example, if your rating for the Leadership competency is 3 and the targeted rating for that competency in the Product Manager job is 4, you might research training classes or ask for projects that would help you improve your leadership capabilities.

If the job or position profile contains fewer than three competencies, then the competency gap chart is displayed as a bar chart. Otherwise, the chart is displayed as a radar chart.

What's a career statement?

A career statement is a summary of your career goals. You can enter your career statement either on your career planning card or your development and growth card in your portrait, and anyone who can view your career planning information can view it.

Career statements are for informational purposes only.

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

The relationship between the potential score and potential level is defined in the potential rating model. When you change the potential level, the application updates the potential score with the numeric rating for that level. When you change the potential score, the application updates the potential level with the level in the rating model that has a numeric rating that is closest to the potential score.

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

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

The talent review process uses these ratings on a worker's profile to build talent review information: talent score, performance rating, potential level, risk of loss, and impact of loss. If you are preparing for a talent review meeting and you update these ratings, then the changes are reflected on the Prepare Content Review page.

When a talent review meeting concludes, workers' career planning cards are automatically updated with the final ratings for talent score, performance rating, potential level, risk of loss, and impact of loss. With the exception of the risk and impact of loss, all ratings from the talent review meeting are assigned a unique instance qualifier to identify them as those that resulted from the talent review meeting. If you then update these ratings on the career planning card, the talent review ratings will remain in the database, but you will see your updates on the career planning card instead of the talent review ratings.

Updating the career potential information also affects the performance-potential analytic in Oracle Fusion Performance Management.

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

Select the **Private** check box for the job or position profile.

Job and position profiles that are set to private can be viewed only by you. Those that are not can be viewed by anyone who can view your career planning card.

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

The suggestions list is automatically generated for you each time you view your career planning card in your portrait. This list contains profiles of jobs or positions that are suitable for you, based on an analysis of how well your competencies, skills, and qualifications match those of the job or position profile.

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

Define Worker Goal Setting

Define Worker Goal Setting: Overview

In the Define Worker Goal Setting activity, human resource (HR) specialists can manage performance and development goal plans, assign goals to workers using a mass process, administer worker goals, and manage the goal library.

For both setup and maintenance tasks, they can:

- Create performance or development goal plans and assign them to organizations, a manager hierarchy, or individual workers.
- Add or update an existing goal plan to add workers, goals, or organizations.
- Populate existing goal plans to add more goals.
- Assign goals using a mass process that they add or edit, or those from the goal library or organization, to a selected population of workers.
- Edit, cancel, or delete performance and development goals of workers.
- Manage goals in the library so that workers can add the goals for their own use, or managers can assign the goals to workers.

For setup tasks only, the HR specialist can also:

- Set profile options to specify the Oracle Fusion Goal Management features that your organization will use, such as the goal library, and goal plans, and approvals.
- Manage common lookups and update those that have user or extensible customization levels.
- Manage e-mail notification settings that are sent to workers and managers reminding them of upcoming events and approvals.

For the setup tasks, use the Setup and Maintenance work area to access the tasks in the Define Worker Goal Setting task list. You can also use the Goal Management work area to access the maintenance tasks.

FAQs for Define Worker Goal Setting

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

After populating the Oracle Fusion Goal Management data tables, you can run the Goal Management Integrity Validations test from the **Help - Supportability** menu. The validations test generates a report that contains details of any rows that are invalid, which you can repair or remove.

For Goal Management, the test validates four categories of data integrity:

- **Business Group Validation:** The test checks to ensure that the business group is valid and exists in the Oracle Fusion Global Human Resources business group table.
- **Foreign Key Validation:** Foreign key attributes must not be null.
- **Field Level Validation:** Field level attributes must match the business rules set up in Goal Management.
- **Row Count Validation:** The row count on the setup tables must be greater than 0.

Manage Goal Plans, Goal Mass Assignment, and Administer Goals

Goal Plans: Explained

Goal plans are a collection of performance or development goals that are grouped by common characteristics, such as a specified time frame and a particular department that must work on them. Goal plans are optional for tracking goals.

Using goal plans, you can:

- Group goals to track them easily for a specific population and time period
- Assign goals to a specific population
- Associate goals to existing goal plans
- Add goals to goal plans from other sources

Grouping and Tracking Goals for a Specific Period

Create performance and development goal plans to contain goals for a group of individuals, to track worker performance and development for the period of the goal plan. Managers, workers, and organization owners can use goal plans to help them sort and track their individual and organization goals and ensure that they have appropriate goals for the goal plan period.

Assigning Goals to a Specific Population

When creating a goal plan, you can assign goals that are specific to the hierarchical structure of one or more managers, and individuals as well.

Organization owners assign goals to the goal plans for their organizations on the My Organization Goals page. After creating a goal plan, you can use the Populate feature to add goals to the goal plan at any time within the time period that the goal plan is active. When you use the Mass Assign Goals feature, the assigned goals are added to any plan that has start and end dates that include the start, target completion, or actual completion dates of the goals. Workers and managers can edit goals to accommodate their specific circumstances after the goals are assigned.

Associating Goals to Existing Goal Plans

Workers, managers and organization owners can associate goals to goal plans once the plan is created. When workers or managers add goals to the worker goals, the goals are associated with goal plans that have start and end dates that encompass the start date, target completion date, or actual completion date of the goal. If those dates belong to different goal plans, the goal is associated with all goal plans for those dates. Goals with no dates are not associated to any plans.

Adding Goals to Goal Plans from Other Sources

Goals added in performance documents or talent reviews are added to goal plans if the start date, target completion date, or actual completion dates of the goals lie between the start and end dates of a goal plan. If no goal plans exist for the dates of the goal, the goal is added to the worker goals on the My Goals page, but not to a plan. If a plan is created later that spans the goal dates, workers and managers can associate the goal with the plan by navigating to the pages where they edit goals and selecting a plan.

Creating Goal Plans: Points to Consider

You can create goal plans to aid your workers and managers in tracking and sorting goals. Goal plans are optional. To use goal plans, you must decide:

- The goal plan type
- Dates that a goal plan is active
- Which manager hierarchies, individuals, or organizations to assign the goal plan to
- Whether to add goals to the plan now or later

Selecting the Goal Plan Type

Create a performance goal plan for performance goals, or a development goal plan to contain development goals. A specific goal can belong to one goal plan type or the other, but not both.

Workers and managers can add goals from the performance goal plan to performance documents to be rated as part of worker evaluations. You can assign performance goal plans to organizations. The organization owner can add goals to a performance goal plan, and use analytics to track how many goals workers have aligned to the organization goals, and the progress they are making toward completing the goals.

Workers can use development goal plans to track development goals to increase their competencies or add to their skill set.

Selecting Goal Plan Active Dates

You must select start and end dates for the plan. For example, it is good practice to select dates to correspond to performance evaluation periods. Dates are used to determine which goals are eligible to belong to a plan. Goals with any or all of the start dates, target completion dates, or actual completion dates, that fall within the start and end dates of a goal plan can belong to the plan.

Assigning the Plan

You can assign performance and development goal plans to a manager hierarchy, or individuals. You can also assign performance goal plans to one or more organizations to make the plans visible to managers on the My Organizational Goals page. On that page, managers can view and assign goals to the plan and use analytics to track the goals.

Workers, managers, and organizations can have more than one goal plan assigned to them. For example, you can create a current goal plan for the direct and indirect reports of a manager so that the workers have one plan that is active now, and another with a start date in the future. The future goal plan can be used to hold goals that will be addressed later, or current goals that span a longer period than does the current goal plan.

You can assign a goal plan to additional organizations, manager hierarchies, or individuals after the plan was created and submitted by using the Assign feature. Goals that are already part of the plan will be assigned to the new people to whom the goal plan is assigned.

Adding Goals to a Plan

You can add goals either that you create, or existing goals that you select, to the goal plan when creating it at a later time. If your enterprise uses tasks and target outcomes, you can add those to the goals you add to the plan. If you have goals that apply to a wide population, it you may prefer to assign these to the plan directly. If goals are generally supplied by managers and workers, you may prefer to assign one goal plan to a wide population without goals. The workers and managers can add the goals to the plan after you submit the plan.

You can add goals only to plans that are assigned to a manager hierarchy or individuals. You cannot add goals to a performance plan that you assign to an organization. If you create a goal plan and assign it both to individuals and an organization, any goals that you add to the plan will be assigned to the individuals, but not to the organization. Organization owners add goals to goal plans using the My Organization Goals page. Goals that you add to a worker's goal plan are added to all that worker's goal plans that have start and end dates that encompass the start, target completion, or actual completion dates, of the goals.

Goals that you add to the goal plan are available to the workers and managers after the plan is submitted. They can edit the goals to suit the needs of the worker or enterprise.

You can add additional goals to an existing plan by using the Populate or Mass Assign Goals features. For example, if a senior manager needs to roll out a new goal late in the goal plan period, you can add it directly to the plan using the Populate feature, submit the plan, and the new goal is added for everyone who is assigned the goal plan. To add goals to the plan using the Mass Assign Goals feature, you can select the population to whom you want to mass assign the goal. The goal is added to the active goals plans of workers who have goal plans that have start and end dates that span the start, target completion, or actual completion dates of the goal.

Goal Plans: Examples

There are two types of goal plans available to assign to workers or organizations: performance and development. The following examples illustrate how human resource (HR) specialists and managers can use goal plans to track worker goals.

Adding Additional Goals to Performance Goal Plans with Existing Goals

Your company uses goal plans to manage worker performance goals. The company requires that the entire staff must complete at least one goal: Complete Ethics Course. Barbara Richardson, a manager, wants to add additional goals to the goal plan for all of her direct reports.

The human resources (HR) specialist creates a goal plan for all the workers in the company for the appropriate goal plan period and includes the Complete Ethics Course goal. Barbara uses the Manage My Directs' Goals page to select the goal plan, and adds additional goals to the goal plan for each of her direct reports.

When application settings specify that performance goals must be in a goal plan, all performance goals that the worker or manager add for the worker, or that are assigned, become part of the goal plan, or another goal plan with start and end dates that encompass the goal start date, target completion date, or actual completion date. When application settings permit, the worker or manager can add performance goals to the worker's goals outside of a goal plan.

Adding Development Goals to Plans

The HR specialist creates the development goal plan for all of Barbara's direct and indirect reports. Barbara wants to assign development goals to a direct report to help the worker prepare for a possible promotion. From the Manage My Directs' goals page, Barbara navigates to the worker's My Goals page, and on the Development Goals tab, she selects goals to assign to the worker to help the worker achieve the promotion.

FAQs for Manage Goal Plans, Goal Mass Assignment, and Administer Goals

What's the difference between creating a goal plan and using the mass assign goals process?

Creating a goal plan for workers specifies the time frames in which those workers must work on their goals within the plan. You can assign goals to the

workers when creating a goal plan, but you can also create goal plans that do not include any specific goals.

When you use the mass assign goals process, you assign performance or development goals to workers without specifying a goal plan in which to include the goals. If goal plans are used, goals with either a start date or target completion date that is contained within the start and end dates of a goal plan of the same type as the goal (either performance or development) are added to the plan. You can also use the mass assign goals process when you are not using goals plans.

How can I create goal plans for people who are new to the organization?

You can either use the Assign feature to add the individuals to an existing goal plan, or create a new goal plan and assign it to the individuals who are new to the organization. If you add new goals to an existing plan, the new goals are assigned to everyone to whom the goal plan is assigned.

What happens if I create a goal plan that includes goals from a previous goal plan?

When you create a goal plan containing goals from a previous goal plan, all incomplete goals for each worker from the previous plan are included in the new plan with the current status intact. Incomplete goals include those with the status of **Not started** and **In progress**. If a worker completes a goal in the period after you create the new goal plan and before the new plan takes effect, the worker or manager must change the goal status manually.

What's a key goal field?

Primary attribute for performance and development goals that can be configured to require manager approval when workers edit it.

The key goal fields are:

- **Goal Name**
- **Description**
- **Start Date**
- **Target Completion Date**
- **Actual Completion Date**
- **Completion Percentage**
- **Weights**
- **Priority**
- **Success Criteria**
- **Level, Category, Measurements**

- [Related Link](#)

Manage Goal Library

Goal Library: Explained

The goal library is a repository of reusable goals that you create and maintain to manage the enterprise goal-setting process efficiently.

Organization owners, managers, and workers can search the goal library to copy the goals. Managers and HR specialists can assign the goals, either in goal plans, or individually, to a selected population. Using the goal library enables you to define goals consistently and reduce the effort of creating a new goal if similar goals have been previously defined.

The goal library is maintained as part of the content library in Oracle Fusion Profile Management.

In the goal library, you can:

- Add goals
- Edit goals
- Set the status of goals

Adding Goals

You can add goals to the library and determine their attributes, including: name, description, success criteria, target completion date, and more. You can also add target outcomes, if available, to the goal. When managers or workers copy a goal, they can change the goal attributes as appropriate.

Editing Goals

You can edit a goal in the goal library at any time, regardless of whether people have already copied the goal. Changes that you make to goals in the library do not affect those that have been copied and are in current use, because there is no link between the two versions of the goal.

Setting Goal Status

By default, the status of a goal you create is set to **Active** to make it available to copy. You can set the status of a goal to **Inactive**, even if the goal has been copied and is currently being used by workers. When you make a goal inactive, it is no longer available to be copied. You can make the goal inactive, for example, to edit it, then restore it to **Active** status to make the edited goal available again.

Define Worker Performance

Define Worker Performance: Overview

In the Define Worker Performance activity, human resource (HR) specialists can define and maintain the elements used to create performance document templates from which performance documents are created to rate workers.

For both setup and maintenance tasks, they can:

- Create document types, sections, and process flows to use in performance document templates.
- Create performance document templates to determine the structure and task flow of performance documents.
- Within performance templates and sections, create default content and target ratings.
- 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 e-mail notification settings that are sent to workers and managers reminding them of upcoming events and tasks.

For setup tasks only, the HR specialist can also specify the default rating model to use for Oracle Fusion Performance Management analytics and HR comparisons.

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.

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, which you must create before you create the performance template.

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 any others you require. 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. 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.

You can configure up to five different section types. Your organization may require an annual performance evaluation that includes any or all of these sections:

- Profile Content to rate worker competencies
- Goals to rate worker goals
- Overall Summary to provide the overall rating of the worker
- Worker Final Feedback
- Manager Final Feedback

Each of these requires separate sections that you add to a performance template to support the process flow used by the template.

Process Flows

Create process flows to determine which tasks workers and managers perform as part of the evaluation process. For example, you can include tasks to set goals, managers to evaluate workers, and workers to evaluate themselves. You can create as many process flows as needed 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

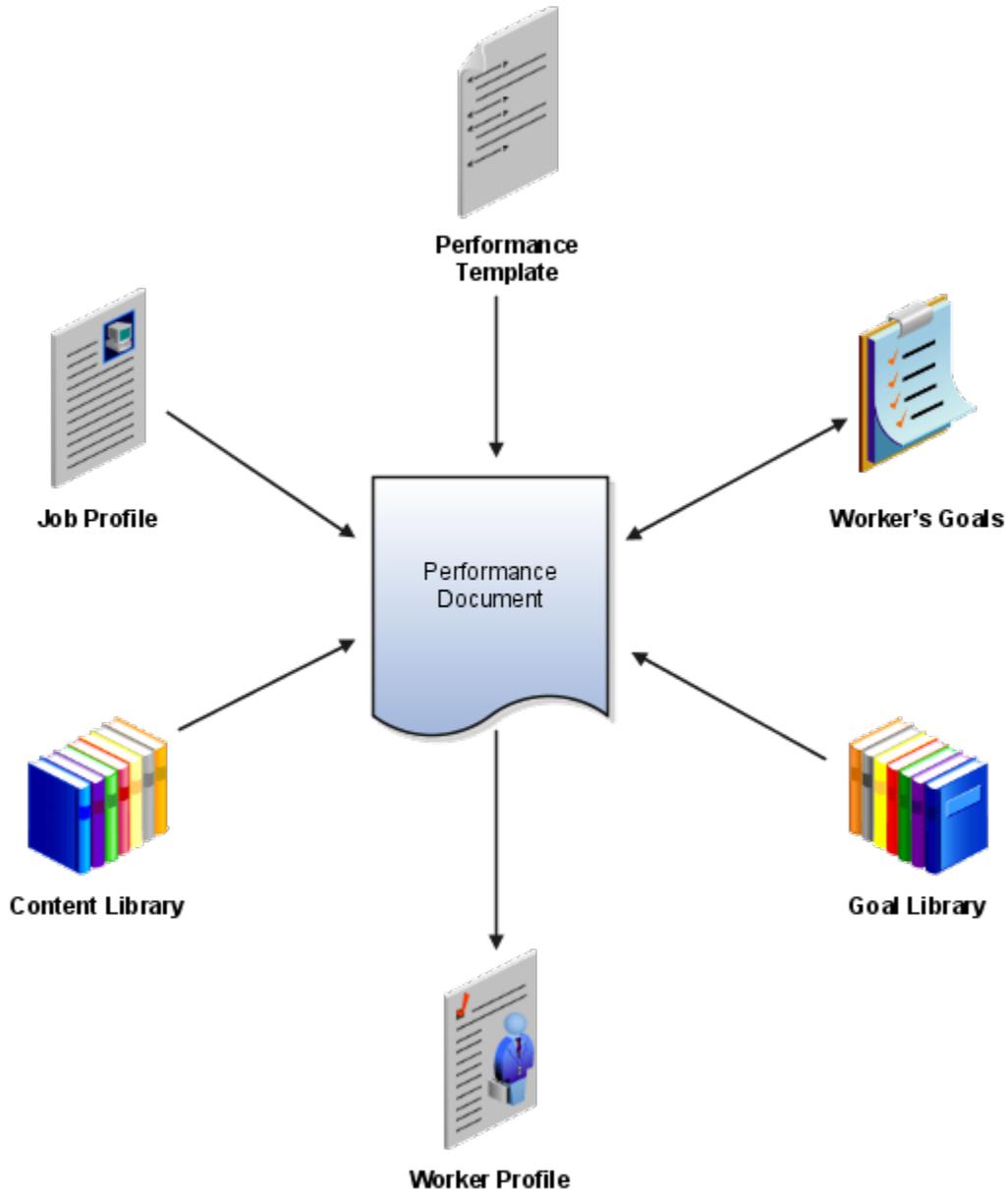
Performance templates bring together the information that is used to create performance documents. In the performance template, you select the roles that can access the performance documents created from the template, specify the processing rules for the document, and enter the periods for which the performance documents are valid. You also 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.

Performance Documents: How They Work with Profiles and Goals

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, and 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. When the performance document is completed the worker's person profile is updated to reflect competency proficiency levels in the performance document. 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.

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



Adding and Updating Content in the Performance Document

When created, the performance document may contain competencies and goals that the performance template is configured to provide. These can include

competencies from the content library or from the worker's job profile. If Goal Management is used, goals from the template may include the worker's own goals and others selected from the goal library. During the evaluation process workers and managers can add additional competencies from the content library, create new goals, and add goals from the goal library. They can also update the performance document to transfer any changes in job competencies, or goals from the Goal Management pages, to the document to ensure that they have the most recent content. The ability to add and update competencies and goals from these sources depends on the settings for the template used to generate the performance document.

To update the competencies and goals in the performance document, they use the **Update Goals and Competencies** action on the pages used to evaluate the worker or set document content.

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.

Managing Goals in Two Locations

If Goal Management is enabled, any goals that managers or workers create in the performance document or add from the goal library are also added to the pages used to manage goals when they save the performance document. When goal plans are used, these goals are added to the active performance goal plan that contains the goal start date. If goal plans are not used, the goals are added to the worker's performance goal list.

Goals that they edit in the performance document are updated in Goal Management so that the primary goal information is consistent in both locations. They can update the goal name, description, status, and dates in the performance document, which are captured in the pages used to manage goals when they save the performance document. Weights added to a goal in Goal Management are transferred to the performance document only when the goal is added to the performance document. Changes to the weight in Goal Management after the initial transfer are not reflected in the performance document. Goal weights are never updated from the performance document to Goal Management. Comments added to goals in the My Goals or Goal Details pages appear in the performance document; those made in the performance document do not appear in Goal Management pages. Goal ratings appear only in the performance document, however. Goals can have additional attributes that display in the Goal Management pages but do not appear in the performance document.

When managers or workers edit the worker's existing goals in Goal Management, the changes are reflected in the performance document when it is opened, or when they perform the Update Goals and Competencies action. 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.

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 competencies and their rating levels provided by the manager. 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.

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 add or update goals in Goal Management, but those changes are not reflected in the performance document.

FAQs for Define Worker Performance

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

After populating the Oracle Fusion Performance Management data tables, you can run the Performance Management Integrity Validations test from the **Help - Supportability** menu. The validations test generates a report that contains details of any rows that are invalid, which you can repair or remove.

For Performance Management, the test validates six categories of data integrity:

- **Business Group Validation:** The test checks to ensure that the business group is valid and exists in the Oracle Fusion Global Human Resources business group table.
- **Foreign Key Validation:** Foreign key attributes must not be null.
- **Field Level Validation:** Field level attributes must match the business rules set up in Performance Management.
- **Row Count Validation:** The row count on the setup tables must be greater than 0.
- **Setup Data Validation:** Data in the setup tables must match the business rules set up in Performance Management.
- **Process Data Validation:** Data in the document tables must match the business rules set up for evaluations in performance documents.

Manage Process Flow Definitions

Performance Process Flow Setup: Points to Consider

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

- Tasks and subtasks to include

- Task sequence
- Task names

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 is not 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	<p>Subtask 1: Track Worker Self-Evaluation</p> <p>Subtask 2: Worker Self-Evaluation</p>	<p>Subtask 1: Manager</p> <p>Subtask 2: Worker</p>	<p>Worker evaluates self. Worker can also add content to be rated to the performance document. The manager can track the worker self-evaluation to view any changes the worker makes to the performance document, but cannot view the ratings and comments the worker provides until the worker completes the subtask.</p>
Manager Evaluation of Worker		Manager	<p>Manager evaluates worker. Manager can also add content to be rated to the performance document.</p>

Manage Participant Feedback		Manager, worker, or both	Select participants to gather feedback about worker performance on 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	Approve the performance document of the worker.
Second Approval		Manager	Approve the performance document of the worker.
Share Performance Document	Subtask 1: Share Performance Document Subtask 2: Acknowledge Document	Subtask 1: Manager Subtask 2: Worker	The manager shares the document so that the worker can view the manager's ratings, and the worker acknowledges viewing the ratings. The setting to determine whether the worker can view the manager ratings is made when defining the performance template sections.
Confirm Review Meeting Held	Subtask 1: Conduct Meeting Subtask 2: Acknowledge Review Meeting	Subtask 1: Manager Subtask 2: Worker	After the worker and manager meet to discuss the evaluation, the manager indicates that the meeting was conducted, then the worker acknowledges that the meeting took place.
Provide Final Feedback	Subtask 1: Worker Provides Final Feedback Subtask 2: Manager Provides Final Feedback	Subtask 1: Worker Subtask 2: Manager	Worker and manager can provide final comments about the evaluation.
Set Next Period Goals		Manager, worker, or both The roles are those specified for the Set Goals task for the performance document for the subsequent period.	Set goals for the period following the active performance document.

Task Sequence

After you select the tasks to include as part of the process flow, you can change the task sequence. Some tasks are logical in sequence. For example, it is 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 choose 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, with the exception of Set Next Period Goals and Manage Participant Feedback, 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. 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.

Workers can perform the Manage Participant Feedback and Worker Self-Evaluation tasks concurrently, but only after the Set Goals task is complete, if it is 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.

Participant Feedback Task Options: Points to Consider

You can include the Manage Participant Feedback task as part of the process flow to gather feedback from participants on a questionnaire as part of a multi-participant 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

Including the Manage Participant Feedback Task

When you include this task, you enable others, such as peers, colleagues, or other managers, to answer a questionnaire in the performance document to gather feedback to help a manager evaluate a worker. You create the template in the Define Questionnaires feature of the Oracle Fusion Profile Management business process, and add the questionnaire to the performance template as a section.

Selecting Participants

You can specify to let managers, workers, or both, select participants to provide feedback. They also 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 is notified by e-mail of the request. However, you can specify whether to permit workers also to request feedback directly to a participant

without manager approval. If you do not select the **Worker can request feedback** option, the worker can still add a participant to the list of potential participants, but 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.

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 is configured to allow questions to be added.

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. The company policy requires that the employees and managers collaborate on adding content to the performance document. Both workers and managers also are required to rate the worker, and the manager is required to request and receive participant feedback from at least two sources to help evaluate the worker. After completing the evaluation the manager must seek approval for the completed performance document. Once the document is approved, managers must conduct a formal meeting with the worker to discuss the evaluation, which the worker must acknowledge. After the meeting, the worker can comment on the performance evaluation or the process, which the manager can then rebut, if necessary. Finally, workers and managers can begin to set the content for the following period's evaluation. ABC will 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 you create to include in the performance template used to create the performance documents for the evaluation.

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 will also be subject to the annual performance evaluation in a few months.

For the project review, the managers will provide all the goals and the reviews as part of the Manager Evaluates Worker task. The workers will not provide any goals or perform a self-evaluation on the project so they can continue to concentrate on their work responsibilities. The manager evaluations must be approved, after which the 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 will use the default names of the tasks and subtasks.

The following table shows the tasks, along with who performs them, and their order that are 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

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

Final Feedback	Worker Manager	Not started In progress Completed	Yes
Set Next Period Goals	Worker Manager	Not started In progress Completed	No

Note

The Manage Participant Feedback Task can be performed concurrently with the Worker Self-Evaluation and Manager Evaluation of Worker tasks, and is 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.

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 Resources (HR) specialist or the manager canceled the performance document

On the Performance Manager Overview 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 cannot begin until the Worker Final Feedback task is completed.

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

Completed	In progress	In progress
Completed	Completed	Completed

Manage Performance Roles

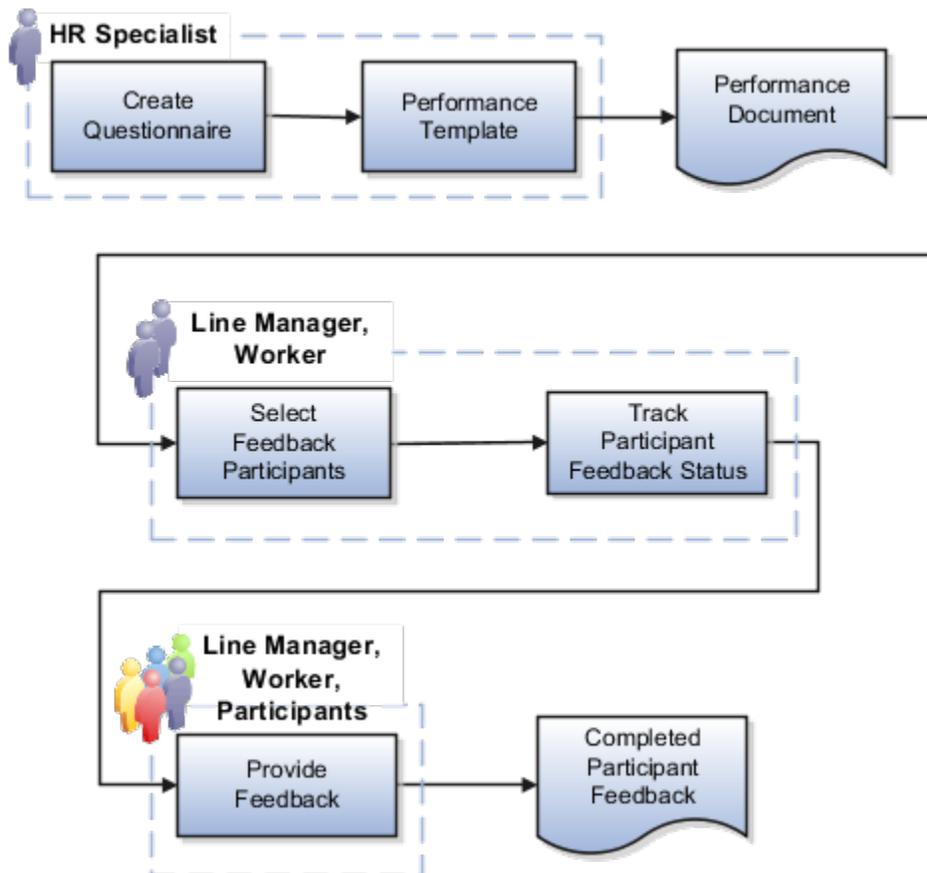
Participant Feedback: Explained

The Manage Participant Feedback task enables individuals other than the manager and worker to provide direct feedback into the worker's performance document using a questionnaire. Participant feedback is recorded as part of the official performance evaluation. Additional roles providing feedback might include peers, mentors, customers, and other managers. The additional roles providing feedback are called participants. 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 feedback according to role
- Use questionnaires to provide feedback
- View participant names 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 Performance Manager Overview or Performance Worker Overview pages or from links on their worklist.

Managers and workers can track participant feedback to monitor its status to see whether it is 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 has not yet provided feedback.

Providing Feedback by Role

Managers and workers, if permitted, can select participants of varying roles to provide feedback, allowing them to gather responses from a variety of perspectives within the organization. HR specialists create the roles and in the performance template select which roles are available to provide feedback for the performance document. They can associate separate questionnaire templates, with different questions, to each role.

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 is provided for the performance document. They can add questions only to the questionnaires that are associated with the participant roles they select. The questionnaire must also be configured to allow them to add additional questions.

The HR specialist creates the template using the Define Questionnaires feature of the Oracle Fusion Profile Management business process.

Viewing Participant Names and Feedback

Managers, and workers, if allowed, can view the names of the requested participants, along with the 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.

Submitting Feedback and Completing the Participant Feedback Process

Completed feedback is available to managers and workers when the participant submits the questionnaire. Participants can continue to provide feedback until the manager either locks the feedback process or completes the Perform Manager Evaluation task and submits the performance document to continue the performance evaluation process. If the participant saved incomplete feedback, it is also viewable when the manager locks the feedback process or submits the document.

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 cannot view participant feedback, the worker cannot print it.

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 multi-participant feedback, you must first define the roles that can participate in the process.

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

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, mentor, or colleague. Every role that you create is classified as a participant role type.

The manager and worker roles are required; you cannot delete or edit them. You can, however, create performance templates that do not require either the manager or worker role to answer a questionnaire, though 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 feedback. The manager and workers roles are also eligible to provide ratings and comments on other content, such as goals or competencies. You must select the roles in the performance template to make them available to access the performance document.

Associating Questionnaires to Roles

Each role is eligible to respond to only one questionnaire for each performance document within performance period. You associate roles to the questionnaires that the role uses in the performance template.

Manage Sections

Performance Template Section: Critical Choices

You must create a section for each task that requires a section used in the process flow.

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 edit the processing options you select for a section.

Section Types

The section types are:

- Profile Content
- Goals
- Questionnaire
- Overall Summary
- 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 Set Next Period Goals	At least one of: <ul style="list-style-type: none"> • Profile Content • Goals
Worker Self-Evaluation Manager Evaluations of Workers	At least one of: <ul style="list-style-type: none"> • Profile Content • Goals • Overall Summary
Manage Participant Feedback	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. When you enable section ratings, managers and workers can select a rating for the section. For the Profile Content and Goals sections, they can rate the section separately from the individual evaluation items contained within the section. For the Profile Content section, the evaluation items include competency type content items. The Goals section contains goal items.

The rate section setting also enables the application to calculate a rating for the section. Managers and workers 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 worker and manager 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 uses the weights to calculate section and overall ratings.

Calculation Rules

In the Overall Summary, Profile Content, and Goals sections, you can have the application calculate the employee's performance rating in addition to having workers and managers manually enter ratings. 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:

- Average

- Sum
- Band

Rating Models

In the Overall Summary, Profile Content, and Goals sections, you use rating models to rate the workers. Rating models are determined in Profile Management. If you use a particular rating model to rate the items in a section, you can use the same rating model to rate the section itself, or you can select a different model to rate the section.

Important

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. These include the Performance and Potential graph and the My Organization Performance Summary on the Performance Manager Overview page.

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 evaluation items, if your organization uses calculated ratings. If you use performance rating models for the items--either because you selected the **Proficiency and performance**, or **Performance**, rating type for the Profile Content section, or it is a Goals section--you can select different rating models to rate individual items separately from the rest of the items in the section. The calculation rules will be applied to each item, then combined using the calculation rule you selected for the section to determine the section rating.

Important

For the Profile Content section, you must select a rating type of either **Proficiency** or **Proficiency and performance** to use a proficiency rating model so the rating (proficiency level) results from the performance evaluation can be updated to the worker's person profile.

Section Content Items

In the Profile Content and Goals sections, you can specify the source of evaluation items that appear in the section. You can also designate additional items to appear in the section.

For the Profile Content section, you can specify competencies to be delivered from the profile related to the worker's job data, or another specific profile that you select. Profiles are maintained in Oracle Fusion Profile Management. 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.

For the Goals section, you can specify whether to use goals from Oracle Fusion Goal Management. Performance goals that workers or managers add to the Goal Management pages that are configured to included in performance documents are added to the document when they:

- Save the goals in Goal Management
- Perform the update action in the performance document

The specific evaluation items you add to the section can be pulled into the performance template when you add the section to it, and into the performance document when it is created.

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 sections of a performance template section. The options are:

- Average
- Sum
- Band

You can change the calculation rule for the section selected in the performance template where the section is used.

Average Method

To use this method, the rating models that are associated with the section and its content items must define numeric ratings that correspond to the rating descriptions. The application calculates the average of the item ratings to determine the section rating, and 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 exist; otherwise, it calculates a straight average. It then converts this average back to a performance document rating, using the rating model.

Sum Method

To use this method, the rating models that are associated with the section and its items must define review points. The rating model for the section must also define point ranges (from points and to points). The application converts ratings to review points as defined in the rating model, calculates the total review points, and converts this total into the corresponding review rating for the section by using the point range on the rating model. Weights, and any items without ratings, are ignored.

When using the sum method for the overall rating, section rating calculation rules can be sum or average only.

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 include a performance document band and define review points as well as point ranges (from points and to points). During the calculation process, the application computes the total review points across all sections and converts this total into the equivalent rating on the document band.

Item Processing: Critical Choices

When you enable content items for a section, you specify the:

- Rating type
- Item calculation
- Properties

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 are not 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 cannot 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, if 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 the items that they add to the document, and managers can select target performance ratings for the items that they, or the workers, add to the document.
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. You can use the Required setting to create a performance template that contains standard competencies and goals, for example, that can be used to rate workers on the competencies for a particular job profile type.

Performance Ratings Using the Average Method: How They Are Calculated

The application can calculate ratings for each section and the overall rating using the average calculation rule. The average rule can be used to calculate ratings using various rating models and apply weighting, when weighting is implemented.

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 calculates the average of the content item ratings to work out the section rating, and 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.

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 points 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 following table shows the ratings for the Competencies section.

Competency	Item Rating	Maximum 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 rating is 5, so the formula to calculate the section rating is:

$(\text{Total Decimal Score}) / (\text{Total Maximum Decimal Score}) \times (\text{Maximum Rating from Section Rating Model})$, or in this example: $(4.4 / 6) \times 5 = 3.67$.

In this example the section rating for competencies is 3.67 out of 5.

The following table shows the ratings for the Goals section.

Goal	Item 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	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 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 section rating for goals is 4.5 out of 5.

To determine the overall rating, the application calculates the average of the two sections. The overall rating calculation is: $(3.67 + 4.5) / 2 = 4.085$. When the rounding rules and decimal settings are applied, the final overall rating is 4.09.

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 do not have weights are ignored in the calculations. The application validates that the sum of the weights for content items within a section is 100, and the sum of the sections that contain content items (that is, the Competencies and Goals sections) within a performance document is also 100. No rounding rules are applied in the performance template, but the ratings are set to display to two decimal places.

The following table shows the ratings for the Competencies section.

Competency	Item Rating	Maximum Rating from Rating Model	Decimal Score (Item Rating / Maximum Rating)	Weight	Weighted Score (Decimal Score x Weight)
Teamwork	4	5	0.8	35	28.0
Leadership	3	5	0.6	5	3.0
Communication	2	5	0.4	10	4.0

Analytical Skills	4	5	0.8	20	16.0
Ethics	5	5	1.0	10	10.0
Conceptual Thinking	4	5	0.8	20	16.0

The sum of the weighted scores is 77.0, from a possible maximum of 100.0. The 77.0 must be converted to a value on the rating model for the section. The section maximum rating is 5, so the formula to calculate the section rating is:

(Weighted Score) / (Total Maximum Weighted Score) x (Maximum Rating from Section Rating Model), or in this example: $(77.0 / 100.0) \times 5 = 3.85$.

In this example the section rating for competencies is 3.85 out of 5.

The following table shows the ratings for the Goals section.

Goal	Item Rating	Maximum 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 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 section rating for goals is 4.40 out of 5.

To determine the overall rating, the application calculates the sum of 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: $3.85 / 5 = 0.77$
- Goals: $4.40 / 5 = 0.88$

The application then calculates the weighted scores for each section, then adds them together. The total weighted scores is out of a possible 100.0 points:

- Competencies: $0.77 \times 40 = 30.8$
- Goals: $0.88 \times 60 = 52.8$
- Total Competencies and Goals: $30.8 + 52.8 = 83.6$

The application converts the scores to the rating model scale to determine the overall rating: $(83.6 / 100.0) \times 5 = 4.18$.

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 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 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 the those used for the individual competencies, and the rating model maximum rating is 7.

Competency	Item Rating	Maximum 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	0.6	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 rating is 7, so the formula to calculate the section rating is:

$(\text{Weighted Score}) / (\text{Total Maximum Weighted Score}) \times (\text{Maximum Rating from Section Rating Model})$, or in this example: $(84.0 / 100.0) \times 7 = 5.88$.

In this example the section rating for competencies is 5.88 out of 7.

The following table shows the ratings for the Goals section. As with the Competencies section, the individual goals use different rating models with different maximum ratings. The Goals section itself uses a rating model with a maximum rating of 6.

Goal	Item Rating	Maximum 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	4	0.75	30	22.5
Grow business in Asia	4	5	0.80	25	20.0
Participate in mentoring	4	6	0.67	15	10.0

The sum of the weighted scores is 82.5, from a possible maximum of 100.0. Because the maximum for the section rating model is 6, the section rating is: $(82.5 / 100.0) \times 6 = 4.95$.

To determine the overall rating, the application calculates the sum of 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: $3.85 / 5 = 0.77$
- Goals: $4.40 / 5 = 0.88$

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 is 60. The total weighted scores is out of a possible 100.0 points:

- Competencies: $0.84 \times 40 = 33.6$
- Goals: $0.825 \times 60 = 49.5$
- Total Competencies and Goals: $33.6 + 49.5 = 83.1$

The application converts the scores to the rating model scale to determine the overall rating: $(83.1 / 100.0) \times 9 = 7.479$. When the rounding rules and decimal places are applied, overall rating is 7.48.

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 calculation rule. The sum method can be used to calculate ratings using any rating model. It can also be used 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, are not 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, and the rating points assigned to each rating level. Items without ratings are not counted when calculating the ratings. For the band method, the rating points must be associated to a band level. The rounding rules and mapping methods must also be set in the performance template for the rating models.

How Performance Ratings Are Calculated

In the sum method, the section rating is the sum of the rating points from the rating level for each content item. The overall rating is the sum of the section ratings.

For the band method, as in the sum method, the application calculates the sum of the section ratings, but for the overall rating, converts the rating point score from the sections to the band associated to that rating point score.

Sum Method with Sum Sections

ABC Company uses the same rating model for the Competencies, Goals, and Overall Summary sections which have five points in the scale, and the numeric values are 1, 2, 3, 4 and 5. Assume that all content items also use the same rating model. The following table shows the rating levels and the rating points assigned to each level.

Rating Level	Rating Points
1--Weak	1
2--Poor	2
3--Average	3
4--Good	4
5--Excellent	5

The following table shows the ratings for the Competencies section.

Competency	Item Rating	Rating Points
Teamwork	4	4
Leadership	3	3
Communication	2	2
Analytical Skills	4	4
Ethics	5	5
Conceptual Thinking	4	4

The score for the Competencies section is: $4 + 3 + 2 + 4 + 5 + 4 = 22$.

The following table shows the ratings for the Goals section.

Goal	Item Rating	Rating Points
Increase sales revenue	5	5
Cut expenses	3	3
Grow business in Asia	4	4
Participate in mentoring	4	4

The score for the Goals section is: $5 + 3 + 4 + 4 = 16$.

To determine the overall rating, the application adds the Competencies and Goals sections: $22 + 16 = 38$.

Sum Method with Sum Sections with Rating Points Variation

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 different rating points for each rating level.

Note

The rating model selected for the Overall Summary section must contain all possible expected values for the sum.

The following table shows the rating levels and the new rating points assigned to each level.

Rating Level	Rating Points
1--Weak	1
2--Poor	3
3--Average	5
4--Good	7
5--Excellent	9

The following table shows the ratings for the Competencies section.

Competency	Item Rating	Rating Points
Teamwork	4	7
Leadership	3	5
Communication	2	3
Analytical Skills	4	7
Ethics	5	9
Conceptual Thinking	4	7

The score for the Competencies section is: $7 + 5 + 3 + 7 + 9 + 7 = 38$.

The following table shows the ratings for the Goals section.

Goal	Item Rating	Rating Points
Increase sales revenue	5	9
Cut expenses	3	5
Grow business in Asia	4	7
Participate in mentoring	4	7

The score for the Goals section is: $9 + 5 + 7 + 7 = 28$.

To determine the overall rating, the application adds the Competencies and Goals sections: $38 + 28 = 66$.

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 Goals sections, but the Competencies section uses the average method. In the Competencies section, the content items use a rating model with different rating points assigned to each rating level than that of the section itself. The

Goals section uses the same rating model for content items as the Competencies section, which assigns the same rating points for each rating level.

The following table shows the rating levels and the rating points assigned to each level for the individual content items in the Competencies section.

Rating Level	Rating Points
1--Weak	1
2--Poor	2
3--Average	3
4--Good	4
5--Excellent	5

The following table shows the rating levels and the rating points assigned to each level for the Competencies section itself.

Rating Level	Rating Points
1--Weak	10
2--Poor	20
3--Average	30
4--Good	40
5--Excellent	50

The following table shows the worker ratings for the Competencies section, which uses different rating models with different maximum ratings for the individual competencies. The section rating model differs from the those used for the individual competencies, and the rating model maximum rating is 7.

Competency	Item Rating	Maximum 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 application calculates the average of the item rating scores: $(0.8 + 0.6 + 0.4 + 0.8 + 1.0 + 0.8) / 6 = 3.67$. 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 4. The application uses the section rating model to determine how many rating points to assign to the section for a rating level of 4. The previous table showed that a rating level of 4 would equate to 40 rating points for the section.

The following table shows the ratings for the Goals section, which uses the sum method, and the rating points for each goal.

Goal	Item Rating	Rating Points
Increase sales revenue	5	5
Cut expenses	3	3
Grow business in Asia	4	4
Participate in mentoring	4	4

The score for the Goals section is: $5 + 3 + 4 + 4 = 16$.

To determine the overall rating, the application calculates the sum of the Competencies and Goals sections: $40 + 16 = 56$

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 rating point ranges set up for the Overall Section rating model to assign the rating level for the overall rating.

Rating Points From	Rating Points To	Rating Level
0	11	E
12	24	D
25	40	C
41	58	B
59	70	A

To determine the overall rating, add the section rating point scores from the previous example. The Competencies section point score is 40; the Goals sections point score is 16. The total is: $40 + 16 = 56$. Using the total number of rating points and applying the ranges shown in the table, the total score of 56 for the sections lies in the range of 41 to 58. The worker's overall rating is B.

Creating a Profile Content Performance Template Section: Worked Example

This example demonstrates how to create a Profile Content section that will be used 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
Will the section rating be calculated? What calculation rule will be used?	Yes, the section uses the Average calculation rule
Which section rating model will be used?	Any

Will the section be weighted?	Yes, the weight will complement the Goals section weight so the sum of the sections is 100
Will content items be enabled for the section?	Yes
Will content items be rated?	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

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
Section Rating Model	Any
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

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

Target Proficiency Level	Any
Weight	Any
Required	Select

4. Click **Save**.

Creating a Goals Performance Template Section: Worked Example

This example demonstrates how to create a Goals section that will be used 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
Will the section rating be calculated? What calculation rule will be used?	Yes, the section uses the Average calculation rule
Which section rating model will be used?	Any
Will the section be weighted?	Yes, the weight will complement the Competencies section weight so the sum of the sections is 100
Will content items be enabled for the section?	Yes
Will workers and Managers have the opportunity to add goals during the Set Goals task, if that task is included in the process flow?	Yes
Will content items be rated?	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
Will content items be added to the section?	Yes, one content item will be added

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
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
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
Use worker's 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
Weight	Any
Required	Select

4. Click **Save**.

Manage Performance Templates

Setting Up the Performance Template: Critical Choices

Performance templates are used to create the performance documents that managers and workers use to evaluate workers' performance for a given time period or project. The performance template brings together 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 need to determine:

- Document types and performance template set
- Participant roles
- Process flow
- Calculation rules and processing options
- Structure
- Content
- Periods

Document Types and Performance Template Set

Select a document type to identify the type of evaluation that the performance template supports, such as annual evaluation, or project evaluation.

Specify the performance template set to determine the business unit to which the performance template belongs. Only people from the business unit that controls the performance template set can use the performance template.

Participant Roles

Specify whether managers, workers, or both are able to view and add ratings to the performance document and which participant roles can provide feedback on a questionnaire about workers' performance. 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.

Process Flow

The process flow you select determines which tasks are included in the performance template. The process flow also determines which sections you can add to the performance template. If the performance template is intended to create performance documents used to rate workers, set goals, and let workers and managers provide final feedback on the evaluation, then 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 does not include the Worker Final Feedback task, you cannot 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 and workers 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, workers and manager choose the rating descriptions from a choice list. The rating description displays no numerical 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 are 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 is not part of the official evaluation, so it does not appear on the completed performance document.
- 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 is not 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.

Structure

Add the previously-defined sections that are required for the process flow selected for the template. You can select any one of each type of your previously-defined sections that are required for this particular template. You can edit the existing section to suit the needs for this particular template, 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.

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, if profiles are set up to be used as a source.

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 is 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 allows you to create performance documents from the same template for different periods that 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 will be 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. The dates for periods can overlap, but cannot be identical for the same template. Within each period, you need to set the due date for each task that is included in the process flow used by the performance template.

When using participant feedback, you also specify within 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.

Defining Processing Roles for Performance Template Sections: Points to Consider

You must add roles to performance template sections so that managers, workers, and participants providing feedback can access the sections, and define the processing settings for each role. You must decide:

- Which roles to add to each section
- Whether to share manager ratings
- Whether to update worker profiles with ratings and content items
- Which roles can access questionnaires and feedback

Adding Roles to Sections

You must add all the roles that need to access 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 see the goals and ratings, then you must add both the manager and worker roles to the Goals 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** region of the **General** tab of the performance template.

Sharing Manager Ratings and Comments

After adding the role, specify whether the ratings or comments that managers provided in the Profile Content, Goals, or Overall Summary sections are available to workers. In the Manager Final Feedback and Worker Final Feedback sections, specify whether workers can view the manager comments. Ratings and comments provided by workers are always visible to all managers who have access to the performance documents.

Updating Worker Profiles with Ratings and Content Items

For the Profile Content section type, you can specify whether to update the worker profile with the ratings provided by the manager and worker, and any content items that were added to the performance document that do not already exist in the worker profile. For the Overall Summary section, specify whether

to update the worker profile with the overall performance rating. The worker profile is updated when the document is completed. You must select the person profile type to which the information is updated.

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 can configure settings to allow which roles can see the questionnaires used to provide feedback. These include determining whether:

- 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.

If you configure the template so that workers cannot view participant feedback, you can set the Participant Role Can Enter Comments Visible to Worker setting to Yes for a participant role, so that participants can add overall comments to the questionnaire that managers and workers can both view.

Creating a Performance Template: Worked Example

This example demonstrates how to create a performance template that will be used to create performance documents containing most tasks in a process flow, and rating workers.

The following table summarizes key decisions for this scenario.

Decisions to Consider	In This Example
What type of performance template is this?	This will be used for an annual performance evaluation
Will section ratings and the overall rating be calculated? What calculation rule will be used?	Yes, the sections use the Average calculation rule
Which section rating model will be used?	Any
Will the sections be weighted?	Yes, the Profile Content section weight will be 40, and the Goals section weight will be 60
Will content items be enabled for the section? Will the sections include content added to the performance template?	Yes, content items will be enabled for the Profile Content and Goals sections; a content item will be added to each section in the template
Will participant feedback be required, and is there a minimum requirement for participants?	Yes, feedback is required with a minimum number of participants; a Questionnaire section must be added to the template to capture participant feedback
What roles will be enabled to provide feedback?	Manager, worker, colleague
Will managers share ratings with workers?	Yes, managers will share their ratings with workers
Will the ratings be used to update the worker profile?	Yes, manager ratings will be used to update the worker profile

Will the performance template be used for more than one period?	Yes, two performance document periods will be set up
---	--

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.
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.

Entering General Information

1. On the **Set Up Workforce Development** work area, click **Manage Performance Templates** to open the **Manage Performance Templates** page.
2. Click **Create**.
3. On the **Create Performance Template** page, in the **General** region, complete the fields, as shown in this table.

Field	Value
Name	Annual Performance Evaluation
Comments	This template is used for an annual performance evaluation.
Performance Template Set	Any
From Date	01/1/11
To Date	12/31/15
Status	Active
Document Type	Any that can be used for an annual evaluation

4. In the **Participation** region, click **Add**.

5. Select **Manager**.
6. In the **Participation** region, click **Add**.
7. Select **Worker**.
8. In the **Participation** region, click **Add**.
9. Select **Colleague**.
10. In the **Participation** region, 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
Minimum Number of Participants Required Per Role	2

11. 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
Decimal Places	2
Rounding Rule	Any
Mapping Method	Any
Display star ratings	Select
Include digital signature	Select
Display kudos	Select
Participant feedback is required	Select
Worker can view participants added by manager	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 region, click **Add**.
2. In the **Section Name** region, select the name of the Profile Content section that you created as a prerequisite for this task.
3. In the **Section Processing** region, 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** 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
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** region, click **Add**.
6. In the **Processing by Role** region, 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	Any
Instance Qualifier	Any

7. In the **Processing by Role** region, click **Add**.
8. In the **Processing by Role** region, complete the fields as shown in this table. Use the default values except where indicated.

Field	Value
Role	Worker

9. Click **Save**.

2. Enter structure details for the Goals section

1. On the **Structure** tab, in the Sections region, click **Add**.
2. In the **Section Name** region, select the name of the Goals section that you created as a prerequisite for this task.
3. In the **Section Processing** region, 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** 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
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** region, click **Add**.
6. In the **Processing by Role** region, 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	Any
Instance Qualifier	Any

7. In the **Processing by Role** region, click **Add**.
8. In the **Processing by Role** region, complete the fields as shown in this table. Use the default values except where indicated.

Field	Value
Role	Worker

9. Click **Save**.

3. Enter structure details for the Questionnaire section

1. On the **Structure** tab, in the Sections region, click **Add**.
2. In the **Section Name** region, select the name of the Questionnaire section that you created as a prerequisite for this task.
3. In the **Section Processing** region, select Questionnaire as the section type.
4. In the **Processing by Role** region, click **Add**.
5. In the **Processing by Role** region, 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** region, click **Add**.
7. In the **Processing by Role** region, 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
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** region, click **Add**.
9. In the **Processing by Role** region, complete the fields as shown in this table. Use the default values except where indicated.

Field	Value
Role	Participant
Participant Role Can Enter Comments Visible to Worker	Yes

10. Click **Save**.

4. Enter structure details for the Overall Summary section

1. On the **Structure** tab, in the Sections region, click **Add**.
2. In the **Section Name** region, select the name of the Overall Summary section that you created as a prerequisite for this task.
3. In the **Section Processing** region, 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** region, click **Add**.
5. In the **Processing by Role** region, 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	Any
Instance Qualifier	Any

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

Field	Value
Role	Worker

- Click **Save**.

5. Enter structure details for the Final Feedback sections

- On the **Structure** tab, in the Sections region, click **Add**.
- In the **Section Name** region, select the name of the Worker Final Feedback section that you created as a prerequisite for this task.
- In the **Section Processing** region, complete the fields as shown in this table. Use the default values except where indicated.

Field	Value
Section Type	Worker Final Feedback

- In the **Processing by Role** region, click **Add**.
- In the **Processing by Role** region, complete the fields as shown in this table.

Field	Value
Role	Manager
Share Comments	Yes

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

Field	Value
Role	Worker

8. In the **Section Name** region, select the name of the Manager Final Feedback section that you created as a prerequisite for this task.
9. In the **Section Processing** region, complete the fields as shown in this table.

Field	Value
Section Type	Manager Final Feedback

10. In the **Processing by Role** region, click **Add**.
11. In the **Processing by Role** region, complete the fields as shown in this table.

Field	Value
Role	Manager

12. In the **Processing by Role** region, click **Add**.
13. In the **Processing by Role** region, 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** region, click **Load Items from Section**.
3. In the **Section Items** region, click **Add**, then complete the fields as shown in this table.

Field	Value
Item Name	Any

4. In the **Details** region, 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** region, click **Load Items from Section**.
7. In the **Section Items** region, click **Add**, then complete the fields as shown in this table.

Field	Value
Item Name	Any

8. In the **Details** region, 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** region, click **Add**.
2. In the **Document Periods** region, complete the fields as shown in this table.

Field	Value
Name	2011 Performance Evaluation First Half
From Date	1/1/11
To Date	6/30/11
Short Name	Any

3. In the **Due Date-** region, complete the due date for each task as shown in this table.

Task	Due Date
Set Goals	6/24/11
Worker Self-Evaluation	7/1/11
Manager Evaluation of Workers	7/8/11

First Approval	7/15/11
Share Performance Documents	7/20/11
Conduct Meetings	7/25/11
Provide Final Feedback	7/30/11
Set Next Period Goals	8/30/11

- In the **Questionnaires for the Period** region, click **Add**.
- In the **Questionnaires for the Period** region, complete the fields as shown in this table.

Field	Value
Template Role	Manager
Questionnaire Name	Any

- Repeat steps 4 and 5, substituting Worker and Colleague for Manager.
- On the **Document Periods** tab, in the **Document Periods** region, click **Add**.
- In the **Document Periods** region, complete the fields as shown in this table.

Field	Value
Name	2011 Performance Evaluation Second Half
From Date	7/1/11
To Date	12/31/11
Short Name	Any

- In the **Due Dates** region, complete the due date for each task as shown in this table.

Task	Due Date
Set Goals	12/23/11
Worker Self-Evaluation	1/8/11
Manager Evaluation of Workers	1/15/11
First Approval	1/18/11
Share Performance Documents	1/21/11
Conduct Meetings	1/24/11
Provide Final Feedback	1/31/11
Set Next Period Goals	12/31/11

- In the **Questionnaires for the Period** region, click **Add**.

11. In the **Questionnaires for the Period** region, complete the fields as shown in this table.

Field	Value
Template Role	Manager
Questionnaire Name	Any

12. Repeat steps 10 and 11, substituting Worker and Colleague for Manager.
13. Click **Save**.

Reviewing Template Settings

1. On the **Summary** tab, review the settings you entered for the template.
2. Click **Save**.

FAQs for Manage Performance Templates

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 in the performance document. For example, if the process flow used by the template requires that managers rate workers and share the performance document, but workers do not provide ratings, you must add both the manager and worker roles.

Manage 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. The comparison of the target rating model distribution to the actual distribution of overall ratings managers give their workers on completed performance documents appears in the **Rating Distribution** analytic that appears on the Performance Manager Overview page. 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 do not create a rating model distribution, the **Rating Distribution** analytic appears only with the number of performance documents for each overall rating the managers provide.

When creating a rating model distribution, you specify the:

- Performance template to associate to the rating model distribution
- Percentages for each rating level in a rating model
- Dates that the rating model distribution is active

Associating a Performance Template to the Rating Model Distribution

You select a performance template set, then a specific performance template from the set, 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.

Important

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 if you want 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 do not replace an expired rating model distribution with another, the rating model distribution does not appear in the Rating Distribution analytic, although the overall ratings the manager provides do appear.

Manage Matrix Layouts

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, enabling them to compare the workers they manage, and distinguish high and low performers. The analytic appears on both the manager dashboard and the Performance Manager Overview page.

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

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. Select the rating model specified in the performance templates for the overall rating of the Overall Summary section to ensure 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. Use this rating model to ensure that the data appears in the analytic on the manager dashboard.

If you create a performance template that uses another rating model for the Overall Summary section, you must associate another box chart to that rating model, and create labels for that box chart, to ensure that the data appears in the analytic on the Performance Manager Overview 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: 3×3 , or 9. If the potential rating model has four rating categories and the performance rating model has three, the total of cells is: 4×3 , 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 portrait card 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 optionally label each cell in the grid with names that describe the level. For example, if the performance and potential rating models used 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, on the other hand, could be called Top Talent.

Manager Viewing Options

On the manager dashboard, managers will see the performance and potential ratings for all workers for the most recent completed performance documents that used the performance rating model selected in the Profile Options. If a worker completed a performance document for 2010, for example, but not in 2011, the 2010 ratings appear in the analytic. If the same worker completed a performance document in 2011 that used a different rating model than the Profile Options rating model, the 2010 ratings appear in the analytic.

On the Performance Manager Overview 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.

Plan Organizational Development Needs

Define Organizational Goals and Measurements

Managing Organization Goals: Explained

Organization owners are managers who manage organization goals to support the objectives and strategy of the enterprise.

Throughout the goal period they can perform the following actions on goals:

- Add, update, cancel and delete
- Publish
- Assign
- Align
- Track using analytics

Add, Update, Cancel and Delete

As organization owner, you can add goals that you create, or those from the goal library, to set the business direction and targets for your organization. You can add goal tasks to a goal to define the actions required to complete the goal, if goal tasks are used.

You can update the original goal as required, but the changes made to a goal after it was published or assigned do not automatically flow to assignees or the organization to which the goal is published. You must republish or reassign the goal if you want workers to use the updated version of the goal.

When you delete a goal, it is removed completely and cannot be recovered. Canceled goals are still visible, but cannot be assigned, published or aligned.

Publish

Publish goals to make them available to everyone in your supervisor hierarchy. They can add the goals to their own lists of performance or development goals to perform. They can edit goal attributes to make them suitable for their own job responsibilities.

Assign

You can assign goals to all the direct and indirect reports, or individuals you select, in your supervisor hierarchy. You can cascade goals to workers by

assigning goals to your direct reports, who can in turn assign the goals, or a similar goal to their direct reports.

You can determine whether to enable workers to update key attributes of the goal, such as goal name, target completion date, and so forth.

Align

Workers can align their goals to your organization goals to ensure that there is a direct relationship between their individual objectives and those of your organization.

When you assign goals, the assigned goal is aligned automatically to the original organization goal. You can also align organization goals to another organization goal.

If you delete an organization goal, you remove the alignment between it and any goals that were aligned to it. When you cancel an organization goal, the alignment to other goals is not removed. Owners of goals that are aligned to the canceled goal receive email notification that the goal they aligned to is canceled. They can then cancel or modify their own goals, align their goals to other goals, or leave the alignment as it is.

Track Using Analytics

Use the organization goal analytics to track how many people in your organization have aligned their goals to the organization goals, and their progress in completing the goals.

Cascading Goals to Promote Strategic Alignment Throughout an Organization: Example

This example uses a four-level organization to illustrate how performance goals can be cascaded from an organization, or individual manager, to every level of the organization to support a higher-level organization goal.

Scenario

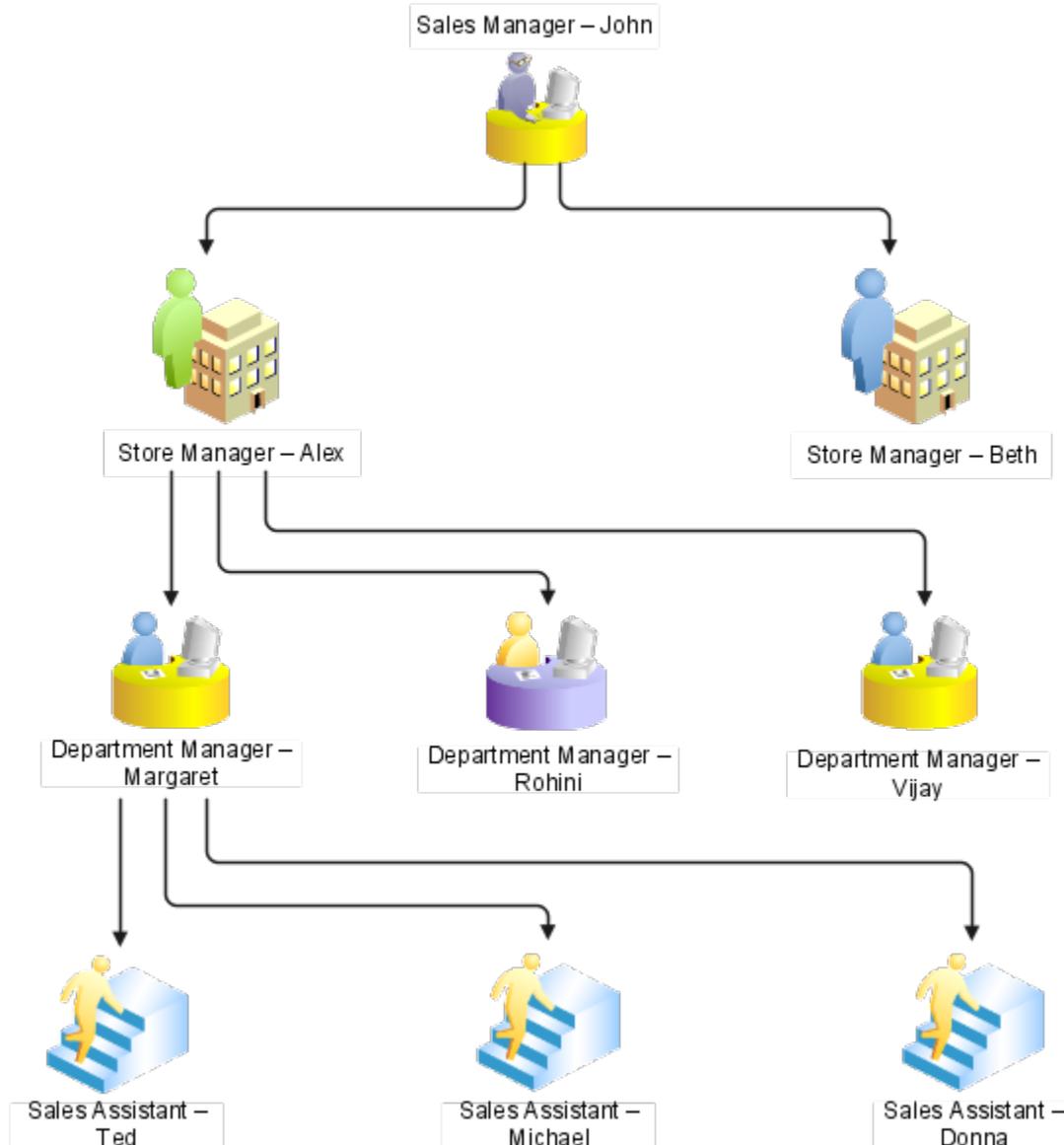
The top manager of your southern sales organization wants to boost sales in your company's southern area. The top manager has decided that setting specific performance goals throughout the organization will best address the sales objectives for the company and meet the sales targets.

Cascading Goals Throughout the Sales Organization

To allocate the enterprise performance goals in some form to all workers in an organization, you can assign the goals by using the cascading process. In this example, the top manager, sales manager John wants to cascade his organization goals to his direct and indirect reports to help meet the sales targets throughout the levels of the southern area supervisor hierarchy. The four levels of the southern area include:

- Sales manager
- Store manager
- Department manager
- Sales assistant

This figure shows the southern area sales hierarchy.



John's organization has the goal "Develop customer awareness," based on the enterprise objectives.

Analysis

John begins the process of cascading the goal by doing the following:

- He sets the organization goals on the My Organization goals page. In this case, he adds the goal "Develop customer awareness." He publishes the goal so that everyone can see the top organization level (southern area) goal.
- John uses the My Directs' Goals page to assign the next level goals to his direct reports, store managers Alex and Beth. He assigns the goal "Conduct customer survey" to Alex and "Devise customer loyalty scheme" to Beth. He aligns both goals to the organization goal "Develop customer awareness."

The store managers will see that they have been assigned goals that align up to John's organization goal. They can use the My Directs' Goals page to assign the

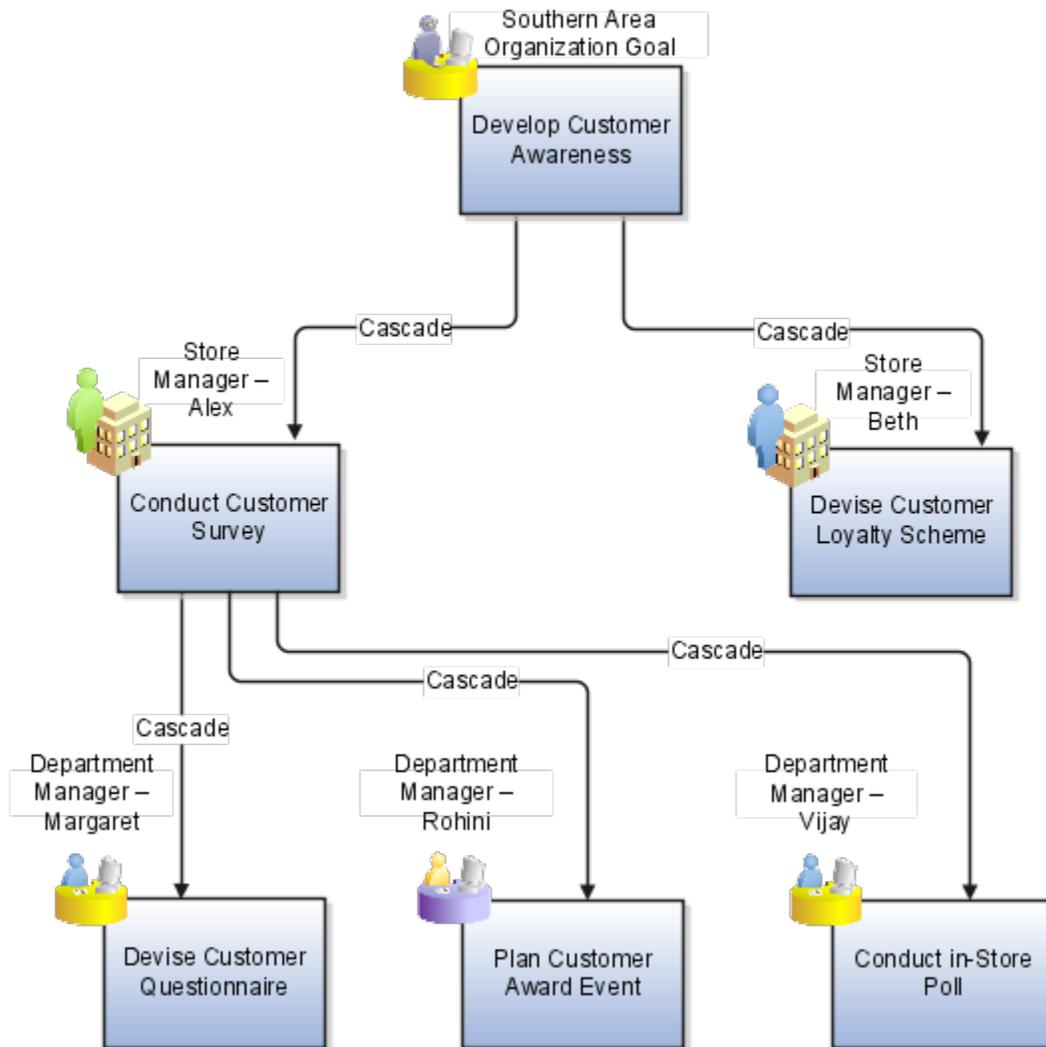
department level goals to their direct reports, the department managers. The table shows the goals that Alex assigns to his department managers.

Department Manager	Goal
Margaret	Devise customer questionnaire
Rohini	Plan customer reward event
Vijay	Conduct in-store poll

Margaret, Rohini, and Vijay can align their individual goals to the goal of their manager, Alex, "Conduct customer survey." They can then use the My Directs' Goals page to assign individual goals to their direct reports. In this example, Margaret can assign goals to her direct reports, sales assistants Ted, Michael, and Donna, and align those goals to her own goal, "Devise customer questionnaire."

The effect of the cascading process is to define performance goals for all levels of John's organization, where each level comprises goals that support, and are aligned to, the goals at the next level above. John, and all the line managers, can track the overall progress on the organization goals using the **Goal Progress Summary** analytic on the My Organization Goals page.

This figure shows the cascaded goals that support the "Develop customer awareness" goal for the southern area from our example.



FAQs for Define Organizational Goals and Measurements

What's an organization goal?

A performance goal published by any level of an organization, such as a corporation, division, or department, that defines the overall objectives of the organization.

Organization owners can assign the goal to any level in an organization, and enable workers to copy it and align their own goals to it to achieve the same overall business objective. Organization goals are always assigned as performance goals.

Review Talent

Talent Review: Explained

The talent review process is centered around one or more talent review meetings intended to evaluate organizational trends, assess strengths, and address areas of risk for an entire organization. The people invited to participate in the meeting, who are generally managers within the organization that is being reviewed, can review and evaluate existing profile, performance, goals, and compensation data for individuals within the organization and calibrate the data before and during the talent review meeting. The human resource (HR) specialist (or other

designated HR business partner) is responsible for organizing and facilitating the meeting in conjunction with the organizational business leader.

During the talent review process, you can:

- View talent across an entire organization or filter to view population segments.
- Calibrate performance and potential ratings.
- Evaluate risk and impact of loss.
- Evaluate compensation plans.
- Create goals for workers.
- Identify, assign, and track actions throughout the review process.
- Store the results for future comparisons.

View Talent Across an Entire Organization or Filter to View Population Segments

During the talent review meeting participants can view a box chart representing any level of the organization to distinguish between high performers who do their job well, those with high potential who may be ready for new opportunities, and those who are performing below expectations. Participants can view them as an aggregate, or compare groups within the organization by filtering according to job, location, or other categories. Drill down to view an individual's data, including performance and potential ratings, the worker's experience, education, licenses, certifications, and willingness to relocate.

Calibrate Performance and Potential Ratings

Based on discussions during the meeting you can create new, calibrated performance and potential ratings for a worker. This has the effect of leveling differences in evaluations between managers to give a clearer picture of the strengths and weaknesses of workers across an organization.

Evaluate Risk and Impact of Loss

Compare the risk and impact of loss ratings provided by participants for workers to ensure workers in key positions can be retained. Managers can use the data to develop development plans or incentives for valuable workers who are likely to leave or whose loss would be significant. Participants can create individual development plans for workers and specific action plans to promote workers or adjust compensation.

Evaluate Compensation Plans

Review current compensation information for workers, including salary, last increase, and stock options to determine if they are compensated fairly and adequately.

Create Goals for Workers

View current goals of workers, and create performance goals that can become part of their performance evaluations, or development goals that are added to their development plans to help them increase their skill set. The goals can be tracked and updated by workers and managers on the pages where they manage their goals.

Identify, Assign and Track Actions Throughout the Review Process

Create action items and capture notes for individuals or the organization to address issues that are identified at the talent review meeting. Participants can also create special assignments for workers who are likely to leave or whose loss would be significant. Track action items using the action plan to ensure completion.

Store Results for Future Comparisons

Data from the meeting is retained so that it can be used in future meetings to compare worker progress between talent reviews. The performance and potential updates captured in the meeting are stored as part of the worker profile

data and can be marked with the talent review as the source to distinguish it from a performance evaluation or other source.

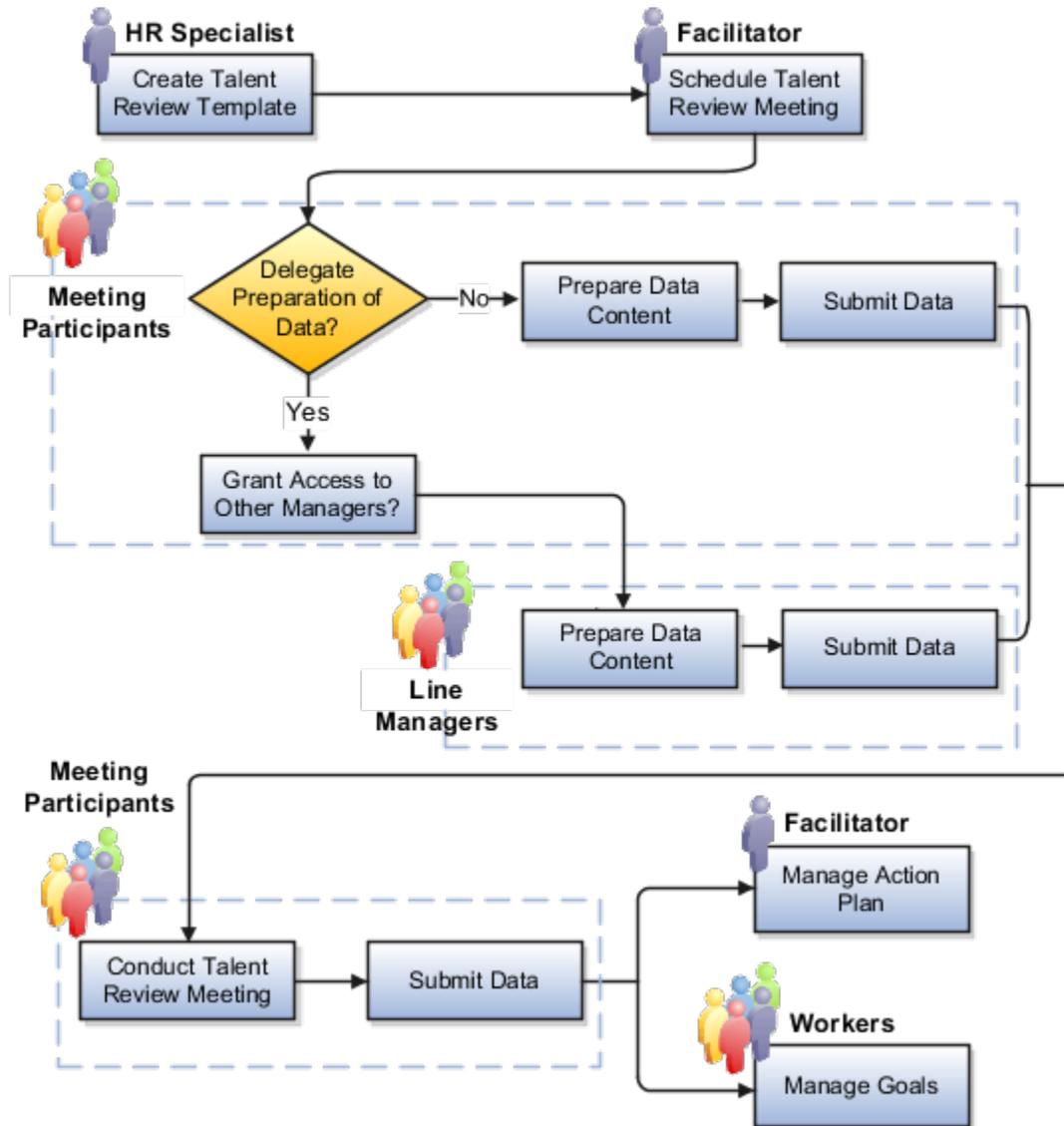
Talent Review Life Cycle: Explained

The life cycle of a talent review spans tasks from creating the meeting template through the completion of the meeting, and follow-through tasks after the meeting concludes.

The talent review life cycle includes the following tasks, some of which are required, and others which are optional:

- Creating the meeting template
- Creating and scheduling the talent review meeting
- Preparing and submitting content
- Conducting the talent review meeting
- Reviewing the action plan and working on goals

The following figure shows the life cycle of the talent review. The responsibilities for the task start with the human resource (HR) specialist who begins the process, followed by a meeting facilitator and managers who provide data and participate in the meeting, and finally concluding with the facilitator, managers, and workers addressing actions or goals created in the meeting.



Creating the Meeting Template

The HR specialist creates a template, which is required to create a talent review meeting. A template can be used for multiple meetings. On the template the HR specialist selects the rating models used to compare the ratings stored on the workers' profile record. The HR specialist also selects which data options to include in the meeting. These data options include population filters which can be used to change the population of workers showing in the meeting box chart according to characteristics such as job and location, and whether meeting participants can review workers' profile or compensation information. Data options also include which actions can be used in the meeting, such as adding goals or using the holding area, and which profile data can be viewed.

Creating and Scheduling a Meeting

The person who is assigned to be meeting facilitator creates and schedules the meeting based on one of the templates created by the HR specialist. As part of the process, the facilitator can edit the content available to be reviewed in the

meeting from the data options selected in the template. The facilitator also selects the participants who attend the meeting, and designates them as either reviewers or participants.

Preparing and Submitting Content

Reviewers update and submit content about the population being reviewed before the meeting. The content, which is then available for the meeting, consists of profile data, such as performance and potential ratings, and talent scores, risk of loss and impact of loss ratings if those are used. The reviewers can use existing data, or edit it to reflect more recent information.

Reviewers can submit the data for their direct and indirect reports, or they can grant access to other managers below them in their hierarchy to submit data about their own direct reports. When reviewers submit the data, the reviewed worker profiles are updated with any changes to their profile data.

The facilitator can track the reviewers' content submission progress to be certain that they are on track to meet the submission deadline, and notify them when the deadline is approaching. Workers for whom no one submitted current data appear in the meeting holding area, if it is enabled. Their data can be updated during the meeting.

Conducting the Talent Review Meeting

On the scheduled date, the facilitator starts the meeting. During the meeting, meeting participants can view the box chart that plots workers according to their performance and potential scores, or talent score, and drill down to show profile and compensation details of individual workers. They can update a workers' performance or potential data, which changes the workers' location on the box chart, and compare current data to that from previous meetings. Participants use the available population filters to view workers according to job, location, or whatever filters are enabled in the template. They can select color displays to differentiate workers according to various categories, and use the color and shape underlays to distinguish workers by impact of loss, risk of loss, and mobility ratings.

The participants can assign performance and development goals to workers, if the Oracle Fusion Goal Management business process is available. They can also add notes for further action and assign tasks to anyone in the organization as part of an action plan. They can save the meeting to continue it later, or submit it to freeze the data. Once submitted, the profile changes are updated on the workers' profile record.

Reviewing the Action Plan and Working on Goals

After the meeting, the facilitator can review the action plan to manage and monitor the tasks. Workers can access goals assigned to them in their goal management pages.

Talent Reviews: How They Work with Profiles, Goals, Performance Documents, and Compensation

HR specialists can set up the talent review template to allow talent reviews to integrate with:

- Profiles
- Goals

- Performance documents
- Compensation

Profiles

Talent reviews use rating models and worker profile data to plot the individuals you are reviewing on a box chart according to their performance and potential rating level scores from their individual profiles. To conduct a talent review, you must select a performance and a potential rating model in the template to set up the box chart. You can also set up a talent review to include the following rating model types: talent score, impact of loss, and risk of loss. If you use a talent score, workers are plotted according to their talent scores on the same box chart as the performance and potential scores. Participants can specify whether to view either the workers' talent scores or their performance and potential scores. Workers' impact of loss and risk of loss scores appear with other worker details.

You can set up the talent review template to include profile data from worker Experience and Qualifications cards, including competencies, degrees, languages, areas of expertise, and mobility rating.

Performance data includes the most recent rating, either from the overall rating of a performance document, or the updated rating provided before the meeting by a participant, or from the Career Planning card.

Updates made during the talent review process are also recorded on the profile record. Managers and participants can update data before the meeting as well as during the meeting. The updated data is recorded on the worker profile, and marked as provided by the talent review using instance qualifiers.

Goals

In a talent review, participants can view the current performance and development goals of the individuals being reviewed, if Oracle Fusion Goal Management is available. Participants can create and assign new goals during the talent review meeting, or select and assign goals from the goal library. The workers, and their managers, can view their assigned goals on their goal management pages, where they can add performance goals to performance documents, and add development goals to development plans.

Performance Documents

You can set up the talent review template to include performance details so that participants can view the worker's overall ratings and comments provided by the manager in the performance document for the most recent performance evaluation. Participants can also view a history of the three most recent performance documents, and open the completed documents directly from the talent review.

Compensation

You can set up the talent review template to make worker compensation data available to view in the meeting. The compensation data that appears includes salary, variable compensation, and stock grant information.

Talent Review Data Options: Points to Consider

You determine which data and actions to make available to participants in a talent review meeting by setting it up in the template used to create the meeting.

The facilitator can further restrict most template options when creating and scheduling a meeting.

When you decide which data options and actions to make available in a template, consider what information you want to expose to the meeting participants. For example, for a meeting of high-level managers, you may want to show compensation data, but not in meetings that include lower-level managers. Your organization may also have policies requiring that certain data, such as age or religion, not be exposed to others. You must decide the options and actions to include from the following types:

- Analytic
- Detail-on-demand
- Population filters
- Action
- Color code

Analytic Options

Analytic layers provide visual representations, using shapes and colors, of key data points tied to a worker's risk of loss, impact of loss, and mobility on the performance and potential box chart. Up to two of these can be selected at one time during the meeting.

These options are available only if rating models exist for risk of loss and impact of loss, and a mobility content type exists to show the worker's willingness or ability to relocate. There are seeded values for each of these in Oracle Fusion Profile Management.

Detail-on-Demand Options

The details-on-demand appear in a dialog that the facilitator can open during the meeting. The details show data for the individuals being reviewed and allow actions to be taken on goals and notes. The table shows the effect of selecting the options.

Detail-on-Demand Option	Effect
Notes	Meeting participants can view notes created by the worker's manager during the content preparation phase before the talent review, and capture and use notes during the meeting.
Compensation Plan Details	Meeting participants can view details about a worker's compensation, including salary, last increase, compa-ratio, stock options, and more. Oracle Fusion Compensation Management must be available to use this option.
Development Plan	Meeting participants can view and edit a worker's current performance and development goals and add additional goals either from the goal library or those created ad hoc. Workers and managers can access the pages on their goal management pages. Oracle Fusion Goal Management must be available to use this option.

Kudos	Meeting participants can view kudos received by a worker from others in the organization.
Performance Details	Meeting participants can view the overall performance ratings for the three most recent performance documents of a worker.
Profile Details	Meeting participants can view profile data from the worker's Experience and Qualifications profile card. These include areas of expertise, competencies, accomplishments, degrees, hobbies and pastimes, and languages.

Population Filters

Population filters let meeting participants control the number of workers who appear on the box chart during the talent review meeting. They can use the filters to view segments of large review populations, and focus on critical segments, such as workers in key jobs or locations.

Action Options

Select action options to make actions and tasks available on the Actions section of the talent review dashboard. The table describes the available options and the consequences of selecting them.

Action Options	Effect
Add Task	The facilitator can assign tasks to meeting participants or others in the organization. The tasks become visible as part of the action plan the facilitator uses after the meeting to follow up on the assigned tasks. The tasks also appear on the work list of the person to whom the task is assigned.
Add Goal	The facilitator can assign goals from the goal library, or create ad-hoc goals, during the review meeting, for the workers being reviewed. Oracle Fusion Goal Management must be available to use this option.
Enable Holding Area	The holding area displays workers who have no ratings for performance, potential, or both, at the start of the meeting. During the meeting, participants can also move workers to the holding area who are plotted on the box chart. If you do not enable the holding area, workers who are not rated at the start of the talent review meeting will not be included in the review.

Color Code Options

Color code options allow participants to highlight specific segments of the review population according to the selected options, and show the average performance and potential ratings and talent scores for all workers within that option.

For example, if you select **Location** on the template, participants will see blue icons representing individual workers in one location, while workers in another location are shown as red, and still another location as green. If you select the **Show average** check box, a blue marker appears on the box chart representing the average performance and potential for all workers in one location, and red and green markers appear representing the average for workers in those locations.

Selecting Participants for a Talent Review: Points to Consider

As part of scheduling a talent review meeting, the facilitator must select the participants who will attend the meeting. Some participants are expected to review and update data used in the meeting, and others just attend the meeting. As facilitator, you must determine:

- Who will be a meeting participant
- What role to assign to the meeting participants

Selecting Meeting Participants

You must specify who will be a participant in the meeting. Typically participants are managers who are part of the supervisory hierarchy within the organization selected to be reviewed. You are not required to invite all managers in the organization to participate, even if those managers have direct or indirect reports who are being reviewed.

You can also select managers outside of that organization to participate. These may be managers, for example, who have recently transferred out of the organization being reviewed but have managed workers who are under review.

The top manager of the organization under review is generally designated as the business leader. The business leader is considered a meeting participant and receives all the meeting notifications sent to other meeting participants.

Assigning Roles to Meeting Participants

When you select participants, their default role is reviewer, which means before the meeting they are expected to review and update worker profile data for their direct and indirect reports who are subject to review in the meeting. Alternatively, you can assign them the role of participant. Participants are invited to the meeting, but are not expected to update profile data before the meeting, because, for example, they have no reports who are subject to review in the meeting, or they are new to the organization.

The application notifies reviewers of their responsibility and provides a link to the **Prepare Review Content** page where they can make the updates.

Reviewers can use the grant access feature to assign their direct reports who are managers to prepare content for their own direct and indirect reports, even if those managers are not designated as meeting participants or reviewers. The managers who are granted access can, in turn, grant access to their direct reports to update profile data for their own reports.

For example, consider organization ABC. In ABC, all of manager Pat Rigney's indirect reports are subject to review. Pat is the direct line manager of Chris Hodges, who has five direct reports, including Jen Hu. Jen has six direct reports. For the ABC talent review meeting, Pat is designated as a reviewer, Chris is designated as a participant, and Jen is neither a reviewer nor participant. Pat receives notification to prepare content for the meeting, and she grants access to Chris to prepare content for his direct and indirect reports. Chris prepares content for his direct reports, but grants access to Jen to prepare content for her direct reports. Pat and Chris attend the ABC talent review meeting, but Jen does not.

FAQs for Review Talent

What happens if talent review content is not complete by the deadline?

The meeting uses data from the current profile record for workers who are reviewed in the talent review. If no performance or potential ratings exist on the profile record for the worker, the worker appears in the holding area of the talent review dashboard at the start of the meeting, instead of the Performance and Potential box chart. Meeting participants can rate the worker during the meeting.

Can reviewers see data for workers they do not manage when preparing content?

No, talent review reviewers can only see and update the profile data for their direct and indirect reports when preparing content for a talent review meeting. However, during the meeting, reviewers who are also participants can see the data for all persons being reviewed.

Can I remove workers from the talent review after it has started?

No, but you can move workers to the holding area to remove them from the performance and potential box chart. Once you move them to the holding area, their performance and potential data is removed, and their data is not updated in their profiles. To move them from the holding area back to the box chart, you must select performance and potential values.

Can I save the talent review meeting until a later date if it is not completed?

Yes, you can save the talent review meeting until a later date, and all the edited values from the meeting are retained until the meeting is resumed, even if a manager or worker updates profile data elsewhere. When the facilitator submits the meeting, the meeting is completed and cannot be edited.

What happens to the performance evaluation rating if I change the performance rating in the talent review?

The rating provided by the manager in the performance document during a performance evaluation is not affected. The performance rating managers provide when preparing content for a talent review or the meeting itself is

recorded to the worker profile as separate from the rating the manager provided for the performance evaluation.

Define Talent Review

Talent Review Template: Explained

The talent review template controls the layout of the box chart used to display worker ratings and the data elements and actions available during the talent review meeting. The human resource (HR) specialist creates a template, which is required to create a talent review meeting. A template can be used for multiple meetings.

Using templates for a talent review enables you to:

- Create templates targeted for specific enterprise requirements
- Assign templates to sets to control access
- Select rating models to determine design and layout of the box chart
- Select data options to make available for a meeting

Creating Templates Targeted for Specific Enterprise Requirements

You can create as many templates as required for your enterprise. If your enterprise uses a standardized process for your talent review meetings across organizations and regions, you may require only one template that can be used for multiple meetings. If your enterprise employs a decentralized talent review processes, you can configure templates to customize talent review meetings by industry, region, or organization.

Use the following questions to determine when more than one template may be required:

- Does your enterprise use a standard set of rating models for performance, potential, risk of loss, impact of loss, and talent score? If so, then a single template may suffice. If different rating models are used within organizations or geographic regions, then separate templates are required.
- Do you use a standard configuration for the box chart throughout the enterprise? If so, you can use one template. When different configurations are required, for example, by separate organizations or geographic regions, separate templates are required. This would be the case, for example, if one organization used a nine-box configuration, while another used a six-box, configuration.
- Do industry or legislative rules governing the use of data related to age, gender, ethnicity, or religious affiliation, vary by organization or geographic region? If so, then separate templates are required to cover the rules for each organization or region.
- Does your enterprise review compensation data at certain levels of the organization or for some talent review meetings, but not at others? If so, then separate templates are required.

Assign Templates to Sets to Control Access

Sets enable you to share templates that are common across business units in your enterprise. You can assign templates to either a specific set or to the common set. When you assign templates to a specific set, then only the business units with access to that set can use the template. If you assign the template to the common set, then the template is available for use in all business units.

Select Rating Models to Determine Design and Layout of the Box Chart

On the template you select the rating models used in the box chart to compare the performance and potential ratings stored on the workers' profile record. The number of rating categories associated with your performance and potential rating models determines the dimensions of the box chart, for example a nine-box or six-box configuration. If your organization has set up a talent score rating model and uses it to rate workers, you can also select to include talent scores to compare workers in the meeting.

Select the Data Options to Make Available for a Meeting

When creating the template, you select which data options to make available for a meeting. These data options include filters which can be used to change the population of workers showing in the meeting box chart according to characteristics such as job and location, and whether meeting participants can review workers' performance evaluation, goal, profile or compensation information. Data options also include which actions can be used in the meeting, such as adding goals or using the holding area, and which diversity-related information, such as ethnicity, gender, and age, can be viewed. When creating a meeting from the template, the facilitator can choose to make some of the data options unavailable for the meeting.

Selecting Rating Models for the Talent Review: Critical Choices

To configure a talent review, you must select both a performance and potential rating model to display, evaluate, and calibrate worker ratings. You can also use additional rating models to rate workers. You must decide which rating models to use for:

- Performance and potential
- Talent score
- Risk of loss and impact of loss

Note

You must set up rating models in Oracle Fusion Profile Management to make them available for the talent review.

Performance and Potential

You must select both a performance and potential rating model to associate with the talent review template. The performance and potential rating models are

used in the talent review meeting to plot worker ratings on the Performance and Potential box chart. The rating models you select are used in any talent reviews created using the template.

When you select rating models that were used to provide current worker ratings, any workers who were rated using the same rating models you selected for the template appear on the Performance and Potential box chart. For example, a worker for whom a manager provided an overall performance score on a performance document using the same performance rating model as the talent review, and also a potential score on the **Career Planning** card using the same potential rating model as the talent review, appears on the box chart.

Any workers who were rated using a different rating model, or those for whom no ratings exist, do not appear on the box chart, but in the holding area of the talent review. These could include, for example, a worker who recently transferred from one organization that uses one performance rating model to another organization within your enterprise that uses a different performance rating model.

Showing Progress Between Meetings

When creating a meeting, the facilitator can set it up to show progress for worker ratings between this meeting and previous meetings. Only meetings facilitators create from templates that use the same performance and potential rating models are available to show progress between meetings.

Updating Worker Ratings to Appear on the Box Chart

Before the talent review meeting, participating managers who are designated as reviewers can update worker ratings on the **Prepare Review Content** page to provide any ratings that are missing or were provided using a different rating model than that used for the talent review. On that page, reviewers also have the opportunity to update the talent score, risk of loss, and impact of loss ratings. The revised performance, potential, and talent review ratings are used in the talent review to plot the workers on the box chart. Meeting participants can also rate workers during the talent review meeting.

Determining the Box Chart Dimensions

You can set the performance and potential rating models to appear either on the Y-axis or X-axis. The number of rating categories contained in each rating model, along with which axis you select to place the rating model on, determines the box chart dimensions and how the cells are arranged.

For example, if you map a performance rating model with two rating categories to the X-axis, and a potential rating model with three categories to the Y-axis, then the box chart contains six cells (2 x 3). The box chart is two cells wide (the performance rating model) and three cells tall (the potential rating model).

Talent Score

The talent score is useful to differentiate and score workers based on factors beyond performance and potential. These might include readiness, ability to mentor, learning agility, or whatever criteria your enterprise uses to rate workers beyond their performance and potential. The talent score is optional in the talent review.

Worker talent scores appear separately from performance and potential scores on the box chart. Because talent scores are tied to a single rating value they are mapped to a specific box on the box chart and do not require a rating category. However, the number of rating levels available in the talent score rating model must match the number of cells in the Performance and Potential box chart. For example, if the Performance and Potential box chart has nine cells, the talent score must have nine rating levels so that the talent scores and cells can map in a one-to-one correspondence.

Once you select the talent score rating model, you select the rating value to place in each cell. If your Performance and Potential box chart has nine cells, for example, and talent scores ranging from 1 (lowest) to 9 (highest), you can select rating level 1 for the lower left cell of the chart, and rating level 9 for the upper right. You must determine which talent scores to place in the cells based on your organization's business rules.

Risk of Loss and Impact of Loss

Select either, or both, risk of loss and impact of loss rating models to enable you to specify these values to be included as analytic options in the talent review template and available in the meeting. The ratings appear in the details displayed for each worker, and also appear on the Performance and Potential box chart with different colors or shapes to distinguish each worker's value.

Talent Review Data Options: Points to Consider

You determine which data and actions to make available to participants in a talent review meeting by setting it up in the template used to create the meeting. The facilitator can further restrict most template options when creating and scheduling a meeting.

When you decide which data options and actions to make available in a template, consider what information you want to expose to the meeting participants. For example, for a meeting of high-level managers, you may want to show compensation data, but not in meetings that include lower-level managers. Your organization may also have policies requiring that certain data, such as age or religion, not be exposed to others. You must decide the options and actions to include from the following types:

- Analytic
- Detail-on-demand
- Population filters
- Action
- Color code

Analytic Options

Analytic layers provide visual representations, using shapes and colors, of key data points tied to a worker's risk of loss, impact of loss, and mobility on the performance and potential box chart. Up to two of these can be selected at one time during the meeting.

These options are available only if rating models exist for risk of loss and impact of loss, and a mobility content type exists to show the worker's willingness or ability to relocate. There are seeded values for each of these in Oracle Fusion Profile Management.

Detail-on-Demand Options

The details-on-demand appear in a dialog that the facilitator can open during the meeting. The details show data for the individuals being reviewed and allow actions to be taken on goals and notes. The table shows the effect of selecting the options.

Detail-on-Demand Option	Effect
Notes	Meeting participants can view notes created by the worker's manager during the content preparation phase before the talent review, and capture and use notes during the meeting.
Compensation Plan Details	Meeting participants can view details about a worker's compensation, including salary, last increase, compa-ratio, stock options, and more. Oracle Fusion Compensation Management must be available to use this option.
Development Plan	Meeting participants can view and edit a worker's current performance and development goals and add additional goals either from the goal library or those created ad hoc. Workers and managers can access the pages on their goal management pages. Oracle Fusion Goal Management must be available to use this option.
Kudos	Meeting participants can view kudos received by a worker from others in the organization.
Performance Details	Meeting participants can view the overall performance ratings for the three most recent performance documents of a worker.
Profile Details	Meeting participants can view profile data from the worker's Experience and Qualifications profile card. These include areas of expertise, competencies, accomplishments, degrees, hobbies and pastimes, and languages.

Population Filters

Population filters let meeting participants control the number of workers who appear on the box chart during the talent review meeting. They can use the filters to view segments of large review populations, and focus on critical segments, such as workers in key jobs or locations.

Action Options

Select action options to make actions and tasks available on the Actions section of the talent review dashboard. The table describes the available options and the consequences of selecting them.

Action Options	Effect
Add Task	The facilitator can assign tasks to meeting participants or others in the organization. The tasks become visible as part of the action plan the facilitator uses after the meeting to follow up on the assigned tasks. The tasks also appear on the work list of the person to whom the task is assigned.
Add Goal	The facilitator can assign goals from the goal library, or create ad-hoc goals, during the review meeting, for the workers being reviewed. Oracle Fusion Goal Management must be available to use this option.
Enable Holding Area	The holding area displays workers who have no ratings for performance, potential, or both, at the start of the meeting. During the meeting, participants can also move workers to the holding area who are plotted on the box chart. If you do not enable the holding area, workers who are not rated at the start of the talent review meeting will not be included in the review.

Color Code Options

Color code options allow participants to highlight specific segments of the review population according to the selected options, and show the average performance and potential ratings and talent scores for all workers within that option.

For example, if you select **Location** on the template, participants will see blue icons representing individual workers in one location, while workers in another location are shown as red, and still another location as green. If you select the **Show average** check box, a blue marker appears on the box chart representing the average performance and potential for all workers in one location, and red and green markers appear representing the average for workers in those locations.

FAQs for Define Talent Review

How can I diagnose any issues with Oracle Fusion Talent Review data?

After populating the Oracle Fusion Talent Review data tables, you can run the Talent Review Integrity Validations test from the **Help - Supportability** menu. The validations test generates a report that contains details of any rows that are invalid, which you can repair or remove.

For Talent Review, the test validates three categories of data integrity:

- **Business Group Validation:** The test checks to ensure that the business group is valid and exists in the Oracle Fusion Global Human Resources business group table.
- **Foreign Key Validation:** Foreign key attributes must not be null.
- **Row Count Validation:** The row count on the setup tables must be greater than 0.

Manage Worker Performance

Establish Worker Goals

Establish Worker Goals: Overview

In the Establish Worker Goals activity, line managers can manage performance and development goals for their direct reports.

They can:

- Add and assign performance and development goals for their direct reports.
- Update the person profiles of their direct reports by adding target outcomes to goals.
- Add and update tasks to provide specific actions that determine how the direct reports can achieve their goals.
- Align the goals of their direct reports to other goals.
- Approve goals submitted by direct reports.
- Cancel or delete goals for their direct reports.
- Track goal attainment with the goal attainment analytic.

To establish worker goals, start from the My Directs' Goals page, which you can access in the Goal Management work area.

FAQs for Establish Worker Goals

Why do my direct reports have goals assigned to them before I have added or assigned any?

Goals may have been assigned by the organization owner or HR specialist before you assigned any goals. Goals may also be present because the workers created the goals themselves, or copied the goals from shared or organization goals. If goal plans are used, the HR specialist can assign goals when creating or editing a goal plan.

What happens if I copy a goal to my own goals from the organization or shared goals?

Goals that you copy from the organization, manager, or colleagues', goals are automatically aligned to the copied goal. You can edit some attributes of the goal to make it fit your particular situation if the goal creator configures the goal to allow you to update it. If goal plans are available, the goal is added to all active goal plans that have start and end dates that encompass either the goal start date or target completion date.

Why can't I see the goal I want to copy?

If the goal that you want to copy is an organization or shared goal, you may need to view the right side of the My Goals page, and search for more organization or shared goals. If the goal that you need is from a goal plan other than the current one, you can use the View menu to search other plans to view goals contained in those, and then copy the appropriate one. Goals that you can copy also may exist on one of the tabs for other goal types, such as the Performance Goals or Personal Goals tabs.

Manage Goals and Manage Individual Development Plan

Manage Goals and Manage Individual Development Plan: Overview

In the Manage Goals and Manage Individual Development Plan activities, managers and workers can manage the performance and development goals of the workers. Workers can also manage their own personal goals.

They can:

- Add performance, development, and personal goals and update them throughout the review cycle.
- Update worker person profiles by adding target outcomes to goals.
- Add and update tasks to provide specific actions that determine how workers can achieve their goals.
- Share their performance and development goals with direct reports or others to make the goals accessible to copy.
- Assign their performance goals to direct reports.
- Align their performance goals to published organization goals as well as to the goals shared by managers and colleagues.

To manage goals and manage individual development plans, start from the My Goals page, which you can access from the Goal Management work area.

Goal Management: Explained

Oracle Fusion Goal Management provides the ability for workers, managers, and organization owners to set and define goals that support the common

objectives of your organization. Using Goal Management, you can grow your organization's talent by creating development goals that capture the growth and career aspirations of the entire workforce. Workers can update goals throughout a goal setting and tracking cycle, and managers and organization owners can track the goals as workers progress through them.

Goal management supports:

- Goal types
- Target outcomes
- Tasks
- Specific, measurable, achievable, relevant, and time-based (SMART) goals
- Goal plans

Availability of these aspects of goal management depends on application settings defined by your organization.

Goal Types

Workers and managers can create two types of goals: performance and development. Workers can also create personal goals.

Performance goals are results-oriented, measure work-related performance, and often use specific targets to assess the level of workers' achievement. Performance goals can be used in performance documents as part of the evaluation process.

Development goals facilitate the career growth of individuals so that they can perform better in their current jobs or prepare themselves for advancement.

Personal goals are available only to the worker. Workers can use personal goals to stretch their capabilities to increase their skills, for example, or as draft goals that they can copy to their performance or development goals.

Managers who are organization owners can also add new or existing goals as performance organization goals, and assign them to any level of the manager assignment hierarchy to support the organization's overall business objectives. Workers' own goals can also be aligned to the organization goals to achieve the same objective.

Target Outcomes

Target outcomes enable the linking of a goal to specific skills or qualifications such as competencies, degrees, certifications, and others. Target outcomes can be used to increase a worker's proficiency for current or future job requirements, or to add to the worker's set of skills.

Tasks

Tasks are specific actions added to a goal that a worker undertakes in order to achieve the goal.

Goal tasks can be of various types, including mentoring, researching, and coaching.

SMART Goals

To measure the performance of workers, help them improve productivity, and achieve career objectives, Goal Management supports goals that are: specific, measurable, achievable, relevant, and time-based (SMART).

For example, the goals can specify how workers will measure achievement of objectives and include target dates.

Goal Plans

Goal plans are used to manage a collection of performance or development goals for a specific period. Goal plans can be rolled out to individuals, a selected hierarchy, or a wider population within the organization.

Making Goals Available to Workers: Points to Consider

There are three ways to make goals available to workers:

- Assign goals to the workers.
- Publish goals to the entire organization.
- Share goals with workers and colleagues.

Any one or all three methods can be used to enable workers to access goals, depending on application settings.

Assigning Goals to Workers

Managers can assign performance goals or development goals to their direct reports. They can assign their own goals, add new ones, or use existing goals from the goal library. Managers can assign goals to all their direct reports or a specific direct report. When managers assign their own goals to workers, the workers' goals are aligned automatically to the manager's goal.

As organization owners, managers can also assign organization goals as performance goals to workers. They can add new organization goals, or use existing organization or library goals to assign directly to any level of the supervisory hierarchy. Organization goals that are assigned to workers are aligned automatically to the original organization goal.

Managers can cascade goals using goal assignment. Using that method, organization owners, for example, can assign goals to their direct report line managers. The line managers can in turn assign the goals to their direct reports. They can assign the goals exactly as they are, or change them to fit the population to which they are assigning the goals.

When goal plans are used, human resource (HR) specialists can assign performance goals or development goals to workers by creating a goal plan for a specific population, then adding goals to it. The HR specialist can add goals

directly to the plan either before or after creating it. Managers or workers can add additional goals to the plan after it is created.

Once the goals are assigned, workers can adapt them to their particular needs, dependent on approval. They can change goal names, target completion dates, tasks and target outcomes, and other characteristics.

Publishing Goals to the Entire Organization

Organization owners can publish goals to make them available for workers in the supervisor hierarchy to add to their list of goals. Workers and managers can also align individual worker goals to published organization goals.

When workers add an organization goal to their own goals, that new goal is automatically aligned to the published organization goal.

Sharing Goals with Workers and Colleagues

Managers can share goals with their direct and indirect reports as an alternative to assigning the goals, for cases where managers want workers to know about the goals but let the workers to decide to add the goals or not. Workers can share goals with their colleagues. Workers can also align their goals to the shared goals of either a manager or a colleague. A goal that a worker adds from shared goals is automatically aligned to the original goal that was shared.

Sharing Goals: Explained

Managers and workers can share goals so that others can add a copy of the goal or align their own goals to it.

Managers can share goals either with their direct or indirect reports. Workers can share their goals with the colleagues whom they select. Tasks that are associated with goals can also be shared. An email notification is sent to the people with whom the goal is shared.

Workers and managers can share goals by clicking the **Share** button on the My Goals page and selecting whom to share with. They can also select the option to share the goal when adding or editing a goal. Managers can select the option to share the goal with their direct reports instead of sharing with each report individually. Once shared, a goal is visible to the person with whom it is shared in the **Shared Goals** region of that person's My Goals page.

Updating and Aligning Shared Goals

Workers can update a goal added from a shared goal to change the goal name and dates, and add target outcomes and tasks if appropriate. If the worker adds a goal shared by a manager, the new goal is aligned automatically to the manager's goal, so that the added goal supports the original goal.

Adding and aligning do not alter the original goal.

Note

The ability to change some key goal fields and add target outcomes and tasks to an added goal is dependent on application settings.

Aligning Goals: Explained

By aligning performance goals, you create a relationship between a worker's goal and another goal, usually a higher-level organization or manager goal, so that the worker's goal supports and contributes to achieving the higher-level goal. Goals can also be aligned to those of colleagues to support peers' goals. Supporting goals can be aligned to only one other goal. Private goals cannot be aligned to another goal or have other goals aligned to them.

Goal alignment provides the flexibility to:

- Align goals automatically.
- Modify supporting goals.
- Remove alignment.

Aligning Goals Automatically

When organization owners assign organization goals to workers, or managers assign their own goals to workers, the assigned goals are copies of the source organization or manager goal. These assigned goals are automatically aligned to the source goal. Goals that workers or managers add from either an organization goal, or a goal shared by a manager or colleague, are also automatically aligned to the organization or shared source goal.

Modifying Supporting Goals

Supporting goals can be identical to the source goal, perhaps with different targets, or they can be completely different. Workers can modify the attributes of the aligned goal.

Removing Alignment

Managers, workers, and HR specialists can remove alignment from one goal to another if desired. If a goal that is aligned to another goal is deleted, the alignment is removed between the goals, but the goal that is not deleted is not affected otherwise. The remaining goal can be aligned to another goal. Canceled goals remain aligned with other goals until the alignment is changed to another goal or removed.

Linking Spaces to Goals: Examples

By linking goals to spaces, you can encourage information exchange within the company and help workers and the organization achieve their goals. The following examples illustrate reasons to link goals to spaces.

Creating a Space to Share a Goal

Grace Hong is an organization manager who assigned to her group the organization goal: Reduce Travel Expenses by 20 Percent. The people in her organization travel frequently throughout South America and the United States to assist clients in implementing company products. Grace believes that

her organization can share tips about how to save money on their travels by choosing more affordable, but still acceptable, hotels, restaurants, and car rental agencies that each of her direct and indirect reports might have found.

Grace edits the goal Reduce Travel Expenses by 20 Percent and creates a space called Cheaper Travel Options. She adds everyone in her organization as members of the space in the role of participant, and grants that role the ability to create and edit the page to add comments, links, and graphics. Grace edits the notification message to encourage the members to share any tips they have to travel more cheaply, such as restaurant or hotel locations.

Adding New Members to a Space

A new direct report, Jason Liggett, joins Grace's organization. Jason has no experience traveling for the company. Grace wants to make sure that Jason benefits from her team's expertise and works toward completing the organization goal. She opens the Cheaper Travel Options space and adds Jason as a member with the role of participant.

Using an Existing Space to Gather Information to Complete a Goal

Thomas Singh is a developer who was assigned the goal: Develop Java Swing Training Course. He has never created a training course before but knows that other people in the company have, and wants to utilize their experience.

While updating the details for the Develop Java Swing Training Course goal, Thomas selects the Spaces link and searches for an existing space that contains information about training. He locates a space called Training Course Gurus. He views the page for the space and finds valuable information on how to create a training course. Thomas links his goal to the space to refer to it whenever he works on the goal.

FAQs for Manage Goals and Manage Individual Development Plan

What happens if I share a goal?

A shared goal is available to others so that they can add it to their own list of goals, or align their own goals to it, when alignment is configured. The goal that you shared belongs only to you and cannot be altered by the people with whom you shared it.

What happens if I align a goal?

When you align a goal to a higher-level source goal, you create a relationship between the two that indicates that the aligned goal supports the source goal. Source goals can be organization goals, or goals that are assigned or shared by managers or the colleagues of a worker. However, the worker's goal is independent; workers can update or modify their goals as needed, or remove the alignment.

What happens if I assign my goal to a worker?

A copy of the goal is added to the worker's list of goals. Your own goal remains in your list and is not changed. Workers can begin working on the assigned goal, and if you select the option to allow workers to update the goal, they can edit key fields, such as goal name, as needed.

Why do I have goals assigned to me before I have added any?

Goals in your list of goals may have been assigned by a manager, the organization, or the human resource specialist. You cannot cancel or delete goals that are assigned to you. Incomplete goals may also have been copied from previous goal plans when the HR specialist creates your current goal plan. Incomplete goals are those with the status of **Not started** or **In progress**.

How can I synchronize goals between the performance document and the My Goals page?

You can add and edit performance goals in either the performance document or on the My Goals page and the primary goal information is consistent in both locations. You can update the goal name, description, status, and dates in the performance document, which are captured in the goals listed on the My Goals page when you save the performance document.

When you add or edit goals on the goal management pages, the changes are reflected in the performance document when it is created, opened, or when you perform the Update Goals and Competencies action.

The goal details held in performance documents and the pages where you manage goals have some differences:

- Goal ratings appear only in the performance document.
- Comments you add to goals to the Success Criteria and Additional Information region on the goal management pages appear in the performance document; those made in the Ratings and Comments region of the performance document do not appear in on the goal management pages.
- Goal weights added in the goal management pages are carried over to the performance document only when the goal is initially added to the document; afterwards, weights are maintained independently.
- Goals can have additional attributes, such as target outcomes and tasks, if these are available, that do not appear in the performance document.

How can I add or remove a goal in a goal plan?

Managers, workers, and human resource (HR) specialists can add a performance or development goal to goal plans when adding or editing the goal by selecting the goal plans to which to add the goal. They can remove a goal from a plan by deselecting the plan. They can also select a goal start date, target completion date, or actual completion date that falls within the start and end dates of an existing goal plan to add it to a plan, or outside the goal plan dates to remove it from a plan.

HR specialists can add goals to a goal plan by using the Populate or Assign features available from the Manage Goal Plans page, or mass assigning goals with start or target completion dates that fall within the goal plan dates.

Managers and HR specialists can delete goals, which removes the goals from any plans. Workers can also delete goals that were not assigned to them by a manager or HR specialist, and that are not part of a performance document, to remove them from any plans.

How can I complete a goal?

Set the status of the goal to **Completed**. If manager approval is required, you must gain final approval for completing the goal.

How can I update or track progress toward goal completion?

Select the goal name on the My Goals page at any time throughout the goal period to record the completion percentage as you progress toward finishing it, or to make any other updates.

Can I update my goal after I have submitted it for approval?

When approval is required for adding a new goal, you can update it only after it is approved. When approval is required for completing a goal, you cannot edit the goal after you submit it for approval, even if it is not approved yet.

Why can't I update my goal?

You cannot update goals that are completed, canceled, or pending approval. If approval is required to update key fields, such as goal name or target completion date, any changes you make are not final until approval is granted.

How can I change a goal from one type to another?

Select the goal that you want to change, then use the Copy action to copy it, and select the type to which you want to change it. The copied goal appears on the tab and the list for the goal type you selected. You can cancel the goal in its original location so that it is no longer active. If you are a manager, you can also delete the old goal. If you are a worker, you can delete the old goal if it was not assigned to you.

Evaluate Worker Performance

Evaluate Worker Performance: Overview

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

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

- Create performance documents to evaluate workers.
- Set goals and competencies in a performance document, on which to evaluate and rate workers.
- Share documents to enhance workflow between workers and managers.
- Conduct and track review meetings, and process approvals.

- Maintain worker performance documents to maximize efficiency and prevent bottlenecks, for example, by canceling or reopening documents, or transferring collaboration status between worker and manager.

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

Task	HR Specialist	Manager	Description
Create Performance Documents	Yes	No	Create a performance document for any worker within the organization for which the HR specialist has access. They can create different performance documents, such as annual and project evaluations, for each assignment for a worker. If a worker has multiple assignments, they can create a separate performance document for each assignment.
Send E-Mail Notification	Yes	No	Send e-mail notifications throughout the selected organization to remind workers and managers of upcoming events and tasks in the performance management business process.
Transfer Performance Documents	Yes	Yes	Transfer a worker's performance document from one manager to another when, for example, the worker is assigned to a new manager, or the manager leaves the organization.
Transfer Set Goals Collaboration Status	Yes	No	Change the collaboration status for the Set Goals task by choosing either the manager or worker, so that the selected role can continue working on the performance document.
Change Due Date	Yes	No	Edit the due date of any task within a performance document that was not completed or canceled.

Reset Evaluation Status	Yes	Yes	Reset the status of the worker self-evaluation or the manager evaluation within a performance document. After resetting the worker self-evaluation, the status changes to In Progress, and the worker can continue to work on the evaluation. After resetting the manager evaluation, the status changes to In Progress, and the manager can continue to work on the evaluation.
Cancel Performance Documents	Yes	Yes	Cancel a performance document to remove it from normal processing. Canceled documents are not deleted permanently from the application. Any profile content that changed as a result of updates to this performance document is restored to its original state before the performance document was created.
Delete Performance Documents	Yes	Yes	Delete canceled performance documents permanently to remove documents that are no longer valid.
Delete Participant Feedback	Yes	No	Remove any participant, regardless of the participant's feedback status, which also removes that participant's feedback for that worker.
Complete Performance Documents	Yes	Yes	Change a performance document to Completed status when a worker or manager has not completed all the tasks in a performance document, and has halted the final processing of the document.

Acknowledge Performance Document	Yes	Yes	Provide acknowledgment for the performance document on behalf of a worker when the worker refuses or is unable to confirm receiving the document. The performance document status is changed to Acknowledged, and the performance management process can continue.
Acknowledge Review Meeting	Yes	No	Confirm that a review meeting or discussion was held on behalf of a worker when the worker refuses or is unable to confirm the meeting. The status of the review meeting is changed to Acknowledged, and the performance management process can continue.
Reopen Performance Documents	Yes	No	Reopen a completed or canceled performance document so that the manager or worker can continue to evaluate the worker. Reopening a document changes its status to In Progress.
Restore Performance Documents	Yes	Yes	Restore any qualified canceled performance document to Completed status. Qualified performance documents are those that had the Completed status before being canceled. The profile content that changed when the performance document was canceled is restored.

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

Creating Performance Documents: Points to Consider

Human resource (HR) specialists, managers, and workers, can create performance documents for workers.

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

Human Resource Specialist Creates Performance Document for Worker

HR specialists can create performance documents on the Create Performance Documents page for anyone to whom they have security access. They can create only one specific performance document, such as for an annual evaluation, for a worker or manager for each assignment. However, they can create other performance documents for an assignment, such as for a particular project. If the person has more than one assignment, the HR specialist can create an additional performance document for each of those assignments. When the HR specialist creates a performance document, it is ready when the worker or manager begins the evaluation. If notifications are enabled, the manager and worker receive notification when a document is created.

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

Manager Creates Performance Document for Worker

Managers create performance documents on the Performance Manager Overview page for direct reports, or workers who are reporting to them for a particular performance document, such as for a particular assignment. If notifications are enabled, the worker receives notification when the manager creates a document.

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

Worker Creates Performance Document for Self

Workers create performance documents on the worker Overview page. If a performance document was not created by the HR specialist or manager, then the worker can select the icon for the first task in the performance document to create the document. If notifications are enabled, the manager receives notification when the worker creates a document.

Manager or Worker Creates Next Period Performance Document

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

Feedback Requests: Explained

Managers and workers can manage participant feedback to request and view participant feedback and monitor participant feedback status. The availability of participant feedback and which roles can perform the tasks are determined

by the configuration of the performance document by the human resource (HR) specialist.

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

Depending on configuration, managers and workers can:

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

Managers can also lock participant feedback.

Adding and Removing Participants

As a manager or worker, you can add participants to the list of people who are eligible to provide feedback about the worker on a questionnaire in the performance document. You can add any number of participants to the list of participants. If a minimum number is required, it is only a guideline; the task can be completed without the minimum required feedback.

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

Selecting the Role for the Participant

When you add a participant, you are required to select the role for the participant. The role determines which questionnaire that the participant uses to provide feedback. You can change the participant role if the participant has not started and saved or submitted the feedback.

Previewing the Questionnaire and Viewing Feedback

You can both preview the questionnaire that is available for the participant role and view feedback submitted by participants by clicking the **View Feedback** link. If you are not permitted to view feedback, you will only see the questionnaire questions, not the responses from participants.

Adding Questions to the Questionnaire

You can add questions to questionnaires for participants you select, if permitted to do so. You can add the question for individual participants, or all participants using a particular questionnaire. The question is added only to the

questionnaires for the participants you select for the current feedback request, not to any other versions of the questionnaire used by these participants or any others for any other feedback request.

You add a question by doing one of the following:

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

You can only add questions to a questionnaire which a participant has not saved or submitted.

Sending Participant Requests

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

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

Locking Participant Feedback

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

When you lock participants, the status for the task to provide feedback is set to **Completed** for that participant and the worker name is removed from the Participant Feedback Requests list on the Performance Manager and Performance Worker Overview pages depending on if the participant is a manager or worker. If the manager decides to gather more feedback from the participant, the manager or worker must issue another request for feedback to the participant.

FAQs for Evaluate Worker Performance

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

Your manager may have added competencies and performance goals directly to your performance document or imported them from other performance

documents. Your manager may also have updated competencies from existing job competencies, or goals from your list of goals on your My Goals page, if it is available. When the document is created, it may also include job competencies, or other default competencies and goals if the template used to create the document is configured to include them.

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

Yes. Once the performance document content is shared, either by the worker or manager when setting goals, you can add competencies and goals to, or remove them from, the performance document.

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

Sharing content while setting goals in the performance document makes it available for further review by either the manager or worker. Submitting the content makes it available to use in the performance evaluation. After submitting the set goals task, neither the manager or worker can add or delete content as part of this task.

What happens if I import performance document content?

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

What happens if I update performance document content?

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

Why can't I update the performance document content?

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

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

You can see the comments and ratings a worker has made in the performance document after the worker has completed the self-evaluation and submitted the performance document.

What happens if I do not request feedback from the minimum number of participants?

The minimum evaluation is not affected and the performance evaluation continues. The minimum number of participants is a guideline, and is not enforced by the application.

What happens if I change the participant role?

The participant may use a different questionnaire, with different questions, than the one associated with the previous selected participant role. Questionnaires are assigned to roles, not individuals. You can only change the role if the participant has not yet started providing feedback.

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

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

Why can't I remove a participant?

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

Analyze Workforce Development

Analyze Workforce Development Performance: Overview

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

They can:

- Compare the potential of workers to their peers to determine those with the highest value.
- Monitor the progress of performance documents and tasks to maintain schedules and address any problem points.
- Identify individuals who are missing performance documents.

To analyze workforce development performance, managers start from the Overview page, which they can access from the Performance Management work area.

FAQs for Analyze Workforce Development Performance

Why can't I select some tasks to perform on the My Directs tab?

You can perform a task on a current performance document only when all the required previous tasks are completed.

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

The box chart displays only workers for whom both overall ratings from the completed performance document and potential data from the worker profile are available.

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

You can see values only for workers whose managers have provided overall ratings in the performance document and the manager evaluation is complete.

Why did a name disappear from the participant feedback requests list?

The name no longer appears on the participant feedback requests list because the feedback request was locked or withdrawn, if you have not provided feedback. If you have submitted completed feedback, the name was moved from the list on the Current tab to the Completed tab.

Glossary

aligned goals

Two goals that have a relationship with each other where one goal supports the other. It is not necessarily a parent-child relationship although aligning a goal typically means aligning up to an organizational or manager goal.

best-fit analysis

A calculation of the best possible matches for a selected person or model profile.

competency

Any measurable behavior required by an organization, job, or position that a person may demonstrate in the work context. A competency can be a piece of knowledge, a skill, an attitude, or an attribute.

content item

An individual quality, skill, or qualification within a content type that you track in profiles.

content library

A repository of the content types and individual content items that can be associated with person profiles and profiles for workforce structures such as jobs and positions.

content type

An attribute such as a skill, quality, or qualification that is added to a profile.

development goal

A goal that is geared toward facilitating the career growth of individuals so that they can perform better in their current job or prepare themselves for advancement.

gallery

A searchable collection of portraits that combines the functions of the person directory with corporate social networking and self-service applications for both workers and managers.

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.

goal plan

A collection of performance or development goals that are grouped by common characteristics, such as a specified time frame or a particular department that must work on them.

goal task

An action added to a goal that a worker plans to undertake to help achieve the goal.

holding area

Displays workers who are selected for review in a talent review meeting but not rated by their managers, or who were rated using different rating models. It also shows workers who are removed from the box chart during the meeting.

HR

Abbreviation for human resource.

impact of loss

A value assigned to a worker for the real or perceived effects on an organization when the worker leaves. Managers assign the impact of loss on the Career Planning profile card, and managers and talent review participants can assign an additional value specifically for a talent review.

instance qualifier set

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

job

A generic role that is independent of any single department or location. For example, the jobs Manager and Consultant can occur in many departments.

model profile

A collection of the work requirements and required skills and qualifications of a workforce structure, such as a job or position.

organization goal

A performance goal published by any level of an organization, such as a corporation, division, or department, that defines the overall objectives of the organization.

organization owner

Manager of an organization who adds and manages goals for the organization to support objectives and strategy of the enterprise.

participant

Person other than the manager who provides feedback about a worker's performance or development upon request.

participant feedback

Responses to questions about an individual by people other than the direct manager or a designated performance manager of the individual. Participants provide responses on questionnaires that are part of the performance document and are saved as part of the official evaluation.

performance document

The online document used to evaluate a worker for a specific time period. The document contains the content on which the worker can be evaluated, which could include goals and competencies. Workers and managers can provide ratings and comments if the document is configured to allow them to do so.

performance document content

The criteria, such as competencies and goals, contained in a performance document on which an individual is evaluated. For example, the performance document content includes the competencies Java Skills and Business Planning on which the worker must be rated.

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. The process flow is included in the performance template and applied to all performance documents generated using this template.

performance template set

A grouping of performance templates that allows the templates to be shared within the business unit that has access to the set.

person profile

A collection of skills, experience, qualifications, work preferences, and career planning information for a worker.

personal goal

A goal that workers can use to increase their skills, for example, or as draft goals that they can copy to their performance or development goals. Managers cannot see the personal goals of workers.

portrait

A selection of information about a worker or nonworker, including contact details, social connections, and activities and interests, that can be viewed and

edited. Both the amount and type of information and the available actions depend on the role of the portrait user.

position

A specific occurrence of one job, fixed within one department, also often one location. For example, the position Finance Manager is an instance of the job Manager in the Finance Department.

profile type

A template that defines the content sections of a profile, role access for each section, and whether the profile is for a person, or for a workforce structure such as a job or position.

questionnaire

A set of questions that respondents are asked to complete that are presented in a specific order and format. It can include open-ended question or items with selection lists.

rating model

A scale used to measure the performance and proficiency of workers.

risk of loss

A value assigned to a worker to rate the likelihood of the worker leaving the company. Managers assign the risk of loss on the Career Planning profile card, and managers or talent review participants can assign an additional risk of loss value specifically for a talent review.

space

A work area that supports people working in a group of any size, organized around an area of interest or a common goal.

talent review

A meeting or series of meetings in which managers analyze organizational trends and potential areas of risk for the company, calibrate performance and potential ratings across the organizational hierarchy, review compensation, and discuss leadership development and succession planning. Depending on configuration, managers can also assign goals to workers.

talent review facilitator

Person who schedules a talent review meeting, manages the content preparation by reviewers before the meeting, launches the talent review dashboard, and manages action items after the meeting.

talent review participant

Person who is invited to attend a talent review meeting.

talent review reviewer

Manager who is assigned to update profile content for direct and indirect reports before the talent review meeting. Reviewers can assign their direct reports who are also managers to update content for their direct and indirect reports.

talent score

An assessment of a worker's overall value to the organization using a rating model your organization defines. The talent score values are mapped to specific cells on the talent review box chart.

target outcome

A specific skill, competency, or certification added to a goal that can be achieved or acquired by the successful completion of the goal.