Taleo Performance User Guide

Confidential Information

It shall be agreed by the recipient of the document (hereafter referred to as "the other party") that confidential information disclosed by Taleo through its documents shall be retained in confidence by the other party, and its respective employees, affiliates and/or subsidiaries, pursuant to the following terms and conditions:

For the purpose herein, the term "Confidential Information" shall mean the following:

Any information, know-how, data, process, technique, design, drawing, program, formula or test data, work in process, business plan, sales, suppliers, customer, employee, investor or business information contained in a document, whether in written, graphic, or electronic form; or

Any document, diagram, or drawing which is either conspicuously marked as "Confidential", known or reasonably known by the other party to be confidential, or is of a proprietary nature, and is learned or disclosed in the course of discussions, demonstrations, or other collaboration undertaken between the parties.

Table of Contents

Performance Review Management

Succession Plan Management

Getting Started 1

Working with Taleo Performance

Welcome to Taleo Performance

Taleo Performance combines innovative performance, goals, career, and succession management with the leading talent management platform for a unified view of talent and performance across your workforce. Assess, acquire, develop, and align your workforce with an intuitive interface and processes that improve retention, remove leadership gaps, improve quality of hire, and align people with goals.

Detailed Description

Taleo Performance allows users to transforms their traditional annual process into an ongoing performance evaluation tool that ties individual and team actions into real business results. The performance process works within normal business patterns making performance management an integral part of everyday business.

Taleo Performance is not a collection of disparate solutions or databases. On a unified platform, managers see not only their goals, but also any risk factors that might impede goal completion.

Managers work with a single, unified view of talent management information and processes. With Taleo Performance, the administrative burden of creating content is eliminated and managers can focus on organizing, comparing, and synthesizing the information. They get one screen, one click, talent management information with easy-to-use collaboration and communication tools. Users work with performance content and make progress towards goals as actions occur. They can build networks by adding individuals or importing whole groups from tools like Microsoft Outlook.

Users systematically share feedback and collaborate, from gathering performance review information and connecting on goals and projects to getting feedback on succession plans, to create accurate and scalable user-driven content. Taleo ties in risk of loss and succession information into goal management so you have visibility into any potential talent gaps that would impact business performance.

With Taleo Performance, career management adds real value to your organization by dynamically generating career paths. Employees can view not only organization charts, but also the actual career paths taken by others with similar skills, preferences, and roles within the organization. Employees get the ability to network with those peers and learn more about a potential new job or career.

Traditional succession planning provides limited views of options when it comes to finding a successor for executives, managers, high potential employees, or top performers. Because Taleo Performance runs on the same unified platform as your recruiting, your succession plans provide a single view of all available talent for a position. You see other people on your team, employees from other departments, and external candidates or contacts in your personal network.

The Taleo Performance User Guide will help users understand and use the Taleo Performance Home page, Performance Reviews, Goal Management, Succession Planning.

The Getting Started section, users will learn about the software commands, options and tools that are common throughout the application and how to logging to the application.

In the Goal Management section, users will learn how to define themes, business goals, projects and project milestones as well as employee goals.

In the Performance Review Management section, users will learn how to manage their self-assessments or their employee performance reviews.

In the Succession Planning section, users will learn how to identify the best individuals that can succeed to employees in key positions.

Related Links

•

Navigation

Taleo Performance uses intuitive graphical, Object Based Navigation which is more user-friendly than the traditional menu structure for navigating to information. For example, throughout the application, wherever an employee name is displayed, there will be an icon following the employee name that expands a menu of itemswhere you can navigate to view various attributes about that person. The navigable list includes the Talent Profile, Performance Review, Goal Plan, Job Position Profile and Succession Plan.

Detailed Description

Taleo Performance provides an easy and intuitive way to interact with the system and the data you have so that you can eliminate the numerous clicks and navigation steps that are required in traditonal applications. Taleo's one-click navigation allows you to navigate directly to information about a given employee by clicking a menu which expands when you click by the person's name. Other "objects" in the system such as business units, positions, etc., have one-click navigation menus contextualized for them so that you can reduce the amount of time you are navigating and quickly get to the various areas of the system.

Smart Breadcrumbs reside across the top of the application and dynamically change as you navigate through the system. The Smart Breadcrumbs allow you to switch between actions similar to the Object Based Navigation. They also allow a manager to navigate between different direct reports with a single click. Smart breadcrumbs also include a Back button and a link to the Employee Center.

When viewing the Manager Center, object based navigation menus distinguish items related to the individual (employee profile, goals, and reviews) from items related to the position the person is in (succession plan and position profile)

Benefits

• Avoiding data silos and increasing efficiency

Object based navigation avoids the traditional data silos that exist within most Talent Management suites. It provides users immediate access to the information they need in the context in which they need it. This form of navigation is more natural to the typical users who do not think of the information they need in terms of products.

Employee Center

The Employee Center is the Home page of the application. It is comprised of a series of panels that provide information relevant to the employee.

Detailed Description

The Employee Center is the home page of the application. Its dashboard-like interface with "panels" or sections provides information on tasks assigned, network members, and goal progress. Screens within the system can be accessed with one click to add and update data.

Down the left column are a series of quick-link panels that are shown based on the employees rights and permissions. For all employees, the Quick Links panel provides links to information about the employee. Depending on an employee's role, the view dynamically changes. For employees that are also managers, the My Team panel provides links to information about the manager's direct reports. For employees that are also HR admininistrators, the HR Admin Tools panel provides links to administrative functionality.

The My Tasks panel provides the employee notification of tasks that he has been assigned. Each task also provides a link to directly access the assigned tasks.

The My Career panel provides a quick view of the employee's goal and their completion status.

The My Network panel provides the mechanism to manage the employee's network. See the Networks topic for more information.

Manager Center

The Manager Center provides a summary of a manager's direct and indirect reports through an organizational chart view of talent management data.

Detailed Description

The Manager Center is the primary tool for managers to access and manage information on their direct reports for all modules activated across the performance suite. The primary section of the page is an organizational chart that provides key data (such as risk of loss or most recent performance rating) for each of the manager's direct reports. This is side-by-side with a "mini org chart" that displays a single analytic data point at a time. The manager can drill down into all layers of his organization. It provides the ability to view key metrics related to each of the performance management modules: performance reviews, goals, and succession. Clicking the icons will display different information related to the specific module. The organizational chart also provides drill-down ability to see the same information for the next level down in the organization.

Benefits

- Unified View of talent management data and simplified navigation
  The Manager Center provides a unified view of talent management data. It allows at-a-glance analysis of different metrics side by side to identify areas that need particular attention by the manager. The ability to take action based on the information is then just a click away.

Impacts

- Integration
    - Manager relationships must be imported into Taleo to be able to see the Org. Chart.

Networking

Networking is a critical component of Taleo Performance. It provides the ability for users to share data with people in their network for the purpose of gathering feedback and providing input that may impact their performance ratings. My Network is a panel on the Employee Center that shows the list of individuals in the employee's current network.

Detailed Description

Networking provides the ability for users to share data with people in their network for the purpose of gathering feedback or for rating performance on specific items. Users can select others to be included in their network. For the purpose of performance reviews, managers will need to approve which network members are allowed to provide feedback.

From the My Network panel, a user can request feedback from one of their network members or they can choose to send unsolicited feedback to the employee.

Users established in My Network are leveraged when requesting feedback in each of the products. For example, when developing succession plans, a manager can request a member of his network to provide feedback on the plan or on specific members of the plan.

Network members can also be associated with tags that help identify them. A given network member can be associated with multiple tags. A list of tags allows the user to then quickly filter the members of their network by clicking on a single tag.

In addition to the Invitation-based network, the system will also present Dynamic Networks when requesting feedback on a specific item within the system. For example, when requesting feedback on a succession plan, the dynamic network would consist of managers and prior managers of individuals on the plan. The manager developing the plan could ask one of those managers to provide feedback.

Benefits

- Networks provide a foundation for enabling relevant and timely feedback.

    Feedback is a natural process that has never been systematized particularly well. Manager and employees typically collaborate with peers to get feedback to assist in reviews, planning, etc.

- Dynamic Networks are particularly valuable since they suggest individuals who are best qualified to provide feedback.

    When combined with the Taleo Inbox, Networking and feedback become useful "everyday" applications as opposed to a once-a-year process that contributes to Performance solutions. Users are able to collaborate and provide useful feedback throughout the year as goals are completed or milestones are reached.

Taleo Performance Home Page

The Taleo Performance home page is represented by the Employee Center. Its dashboard-like interface with "panels" or sections provides information on tasks assigned, network members, and goal progress. Screens within the system can be accessed with one click to add and update data.

Down the left column are a series of quick-link panels that are shown based on the employees rights and permissions. For all employees, the Quick Links panel provides links to information about the employee. Depending on an employee's role, the view dynamically changes. For employees that are also managers, the My Team panel provides links to information about the manager's direct reports.

For employees that are also HR admininistrators, the HR Admin Tools panel provides links to administrative functionality.

The My Tasks panel provides the employee notification of tasks that he has been assigned. Each task also provides a link to directly access the assigned tasks.

The My Career panel provides a quick view of the employee's goal and their completion status.

The My Network panel provides the mechanism to manage the employee's network..

Following is a brief overview of the Home page components of the Taleo Performance.

1	Employee Center, which represents the home page of Taleo Performance.
2	Utilities bar that gives access to various information such as setup configuration, online help, customer support, and product version. This bar also contains the Sign out option.
3	Performance Card that provides summary level performance information about an employee. It also allows access to the various functional areas of the application.
4	My Tasks panel that lists all the tasks assigned to the user.
5	My Network panel that shows the list of individuals in the employee's current network.
6	Quick Links panel that allows the user a quick access to his own information.
7	Manager Center panel that provides a quick access to manager functions.

Related Links

- Navigation
- Employee Center
- Manager Center
- Networking
- Taleo Performance User Interface Elements

Taleo Performance User Interface Elements

All user interface elements displayed in Taleo Performance are presented in the following table. Each entry in the table includes an element, a description and the part of the application to which the element applies.

UI Element	Description	Picture	Location
Utilities Bar	The utilities bar is where you can have access to various information such as setup configuration, online help, customer support, and product version. This bar also contains the Sign out option.		Anywhere in the Performance application
Back arrow	The back arrow brings you to the previously viewed page.		Anywhere in the Performance application
Home icon	The home icon brings you to the main page of the application, also called the Employee Center.		Anywhere in the Performance application
Performance Card	The performance card provides summary level performance information about an employee. It also allows access to the various functional areas of the application.		Anywhere in the Performance application

UI Element	Description	Picture	Location
Down arrow	The down arrow opens a Go to: window that allows you to access sections such as Talent Profile, Employee Goals, etc.		Performance Card
Top right-hand corner of Performance Card	You can click the top right-hand corner of the Performance Card to view back side or front side information, depending on which side of the card is currently displayed.		Performance Card
Blue down and up arrows	You can use the down and up arrows to view information on elements such as review, succession, etc.		Backs side of the Performance Card
Hide Card link	Click Hide Card if you want to hide the Performance Card in order to leave more room to view information.		Every page except the home page
Show Card icon	Click this icon to display the Performance Card.		Every page except the home page
Create a new goal icon	Click this icon to create a new goal. The Create a new goal window is displayed.		Employee Goals
Create a sub-goal icon	Click this icon to create a new sub-goal. The Create a new goal window is displayed.		Employee Goals
Remove the item icon	Click this icon to remove a selected item (goal, project, milestone, etc.). A confirmation message is displayed after clicking the icon.		Employee Goals, Business Goals, My Projects
More details	Click this icon to open the Details window, where you can provide more thorough information.		Employee Goals, Business Goals, My Projects
Clock icon	The clock icon indicates that time is running out to achieve a goal.		Employee Goals
Critical icon	The critical icon indicates that the goal achievement at the set date is critical.		Employee Goals
Not aligned flag icon	The Not aligned flag icon indicates that the goal is not aligned with another goal.		Employee Goals
Straight flag icon	The straight flag icon indicates that the goal is aligned with another goal. The tooltip indicates which goal the current one is aligned with.		Employee Goals
Display mode icons.	The display mode icons offer three ways to display the goal information.		Employee Goals, Business Goals
List mode icon	Click the list mode icon to display the goals in the manner of a list.		Employee Goals, Business Goals, Succession Plan
Card mode	Click the card mode icon to display goal information as a detailed card.		Employee Goals, Business Goals
Timeline mode	Click the timeline icon to display goal information based on a time scale.		Employee Goals, Business Goals, Succession Plan
Blue left and right arrows	Use the left and right arrows to navigate from one goal to the other when displaying goals in the card mode.		Employee Goals, Business Goals, card mode.

UI Element	Description	Picture	Location
Right arrow	The right arrow at the end of the goal field displays a menu containing the three following options: Edit Details, View Line of sight, and Drill Down		Employee Goals, Business Goals, timeline mode.
Show Tools icon	Click the Show Tools icon to see Feedback and Alignment tools.		Employee Goals, Business Goals
Hide Tools link	Click this link to hide the Feedback and Alignment tools.		Employee Goals, Business Goals
Request Feedback icon	Click this icon if you want to request feedback about a goal. The Request Feedback window is displayed.		Employee Goals
Remove icon	Click the icon if you want to remove a feedback from the feedback list.		Employee Goals
Create a new goal icon	Click this icon if you want to create a new business goal. The Create a new goal window is displayed.		Business Goals
Create a sub-goal icon	Click this icon if you want to create a business sub-goal. The Create a new goal window is displayed.		Business Goals
Create a new business project icon	Click this icon to create a new business project. The Create a new business project window is displayed.		Business Goals, My Projects
Create a new milestone icon	Click this icon to create a new milestone. The Create a new milestone window is displayed.		Business Goals, My Projects
Create a new sub-project icon	Click this icon to create a new business sub-project. The Create a new business project window is displayed.		My Projects
Mini Org Chart	Drop down tool located on the Manager Center that allows the user to bring in additional performance data such as Risk of Loss for comparison with information displayed on the Performance Cards.		Manager Center
Navigation Wheel	Navigation wheel located on the Manager Center which allows rotation of the Performance Cards through various pieces of performance data.		Manager Center

Logging Into Taleo Performance

Taleo Performance Login

There are three scenarios supported for logging in Taleo Performance depending on your status: a user with an employee record, with an employee record and a HR-Admin role or with no employee record but a HR-Admin role.

Detailed Description

These are the three possible scenarios.

- As a user with an employee record:

  If you are a user with an employee record, the rights associated to your status only allows you to access your own information (performance review, succession plan and goal plan). When logging in the application, you automatically access your profile.

- As a user with an employee record AND a HR-Admin role:

  By default, you will automatically access your profile when logging in the application. However you can navigate through the Manager Center and see other employee's information.

- As a user with no employee record but a HR-Admin role:

  Since you have no employee record, the only information available is other's. Therefore you have to specify whose information you want to consult. When logging in the application, a window will ask for the appropriate information.

Logging With an Employee Record

Logging in the application as a user with an employee record allows you to access your information (performance review, succession plan and goal plan) but only yours.

1. Select Taleo Performance from the product listing window.

2. From the User Sign In window, enter your user name and password. Click Sign In.

3. The Taleo Performance opens and displays the Employee Center.

Related Links

- Taleo Performance Login
- Logging With an Employee Record and a HR-Admin Role
- Logging with no Employee Record but a HR-Admin Role

Logging With an Employee Record and a HR-Admin Role

Logging in the application as a user with an employee record and a HR-Admin role allows you to access your information (performance review, succession plan and goal plan) and others. From the Manager Center you can navigate through all employees' information.

1. Select Taleo Performance from the product listing window.

2. From the User Sign In window, enter your user name and password. Click Sign In.

3. The Taleo Performance opens and displays the Manager Center.

Related Links

- Taleo Performance Login
- Logging With an Employee Record
- Logging With an Employee Record and a HR-Admin Role

Logging with no Employee Record but a HR-Admin Role

When you have no employee record but a Hr-Admin role, you must specify whose file you want to consult.

1. Select Taleo Performance from the product listing window.

2. From the User Sign In window, enter your user name and password. Click Sign In.

3. The Taleo Performance opens and displays the Select an Employee Window.

4. Enter the employee name and click Search.

5. Among the search results, select the appropriate employee name.

6. Click Select.

The Employee Center opens with all the employee information available. You should remember though that all actions and security checks are made in regards to the logged in user.

At any point you can switch employee by clicking the name in the top left corner.

Related Links

- Taleo Performance Login
- Logging with no Employee Record but a HR-Admin Role
- Logging With an Employee Record

Goal Management 2

Getting started with Goal Management

Goal Management

Goal Management provides the ability to establish an alternative to traditional organizational hierarchy that is used uniquely for goal management. In most organizations, the traditional organizational structure used for cost center management is too fine-grained for managing business goals. The alternative structure allows the organization to simplify the organizational structure for goal management. For example, an organization might have multiple cost centers for managing their Call Center Support that is organized based on different products or geographies.

Detailed Description

Goal Management provides the ability to define themes, business goals, projects and project milestones.

- A Theme is the highest level for categorizing goals. Themes provide support for organizations that use Balanced Scorecards in that they allow the categorization of goals and projects into specific scorecard categories such as Financial, Customer, and Development.
- Business Goals are qualitative or quantitative statements of an organization's intent or objectives, for example, "Increase Operational Efficiency 5%."
- Projects are discrete efforts by the organization. Projects provide the ability to assign a project owner and assign goals directly to employees working on the project, for example, "Evaluate, select and implement a Talent Management solution."
- Within a project, a Milestone is an element that marks the completion of a specific set of tasks or a phase, typically marked by a high level event such as completion, endorsement or signing of a deliverable, document or a high level review meeting. In the example above, a milestone might be "Select Talent Management Vendor."

Benefits

- Provides an organization with versatility in defining themes and goals.
- Allows for qualitative and quantitative measurement of tracking goals.

Removing an Item

It is possible to remove an item (goal, sub-goal, etc.) from the Goals list.

Prerequisite

There must be content in the Goals list.

Employee Goals or Business Goal

1. In the Goals list, place your cursor on the item that you want to remove.

2. Click .

    A confirmation message is displayed.

3. Click Yes to remove the item.

Result

The item is removed from the Goals list.

After Completing This Task

Here are other links related to goal management.

Related Links

- Goal Management
- Requesting Feedback
- Requesting Approval
- Goal Fields and Buttons

Viewing further Details

It is possible to view more details about an item.

Prerequisite

There must be at least one item (goal, projec, etc.) in the list.

Employee Goals, Business Goals or My Projects

1. Place your cursor on the item for which you want to see further details.

2. Click .

Result

The Details page is displayed.

After Completing This Task

It is possible to edit an item from this page.

Related Links

- Goal Management
- Editing an Employee Goal or Sub-Goal
- Editing a Business Goal or Sub-Goal
- Goal Fields and Buttons

Displaying the List Mode

You can display your employee goals, business goals or projects using the list mode. The list mode is the list of items with information on key dates and progress.

Prerequisite

Employee Goals, Business Goals or My Projects

1. Click [ ].

Result

You now see all your items in the form of a list.

After Completing This Task

You can also view the items in card mode or timeline mode.

Related Links

*   Business Goals
*   Displaying the Card Mode
*   Displaying the Timeline Mode
*   Goal Fields and Buttons

Displaying the Card Mode

You can display your employee goals, business goals or projects using the card mode. The card mode provides select details on a single item at a time with the ability to edit progress.

Prerequisite

Employee Goals, Business Goals or My Projects

1. Click [ ].

Result

You now see the items in a card mode.

After Completing This Task

You can also view items in list mode or timeline mode.

Related Links

*   Goal Management
*   Displaying the List Mode
*   Displaying the Timeline Mode
*   Goal Fields and Buttons

Displaying the Timeline Mode

You can display your employee goals, business goals or projects using the timeline mode. The timeline mode provides a timeline view of items start and due dates.

Prerequisite

Employee Goals, Business Goals or My Projects

1. Click ⬛ .

Result

You now see all your items according to a timeline.

After Completing This Task

You can also view items in list mode and card mode.

Related Links

- Goal Management
- Displaying the List Mode
- Displaying the Card Mode
- Goal Fields and Buttons

Requesting Approval

Both employee and manager can access the employee goal plan and create goals. A manager may edit or delete goals created by the employee. Both users must submit their acceptance of the plan for the plan to be considered approved.

Prerequisite

There must be at least one goal in the goal plan.

Employee Goals

1. In the Employee Goals page, place your cursor on the goal for which you want to request approval.

2. In the Action menu, select Request Approval.

    The Request Approval confirmation window is displayed with the name of the approver (i.e. the manager).

3. Click Save.

Result

The approval request is now sent to the manager, who will see the approval request in his list of tasks.
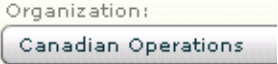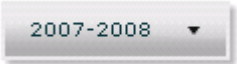
After Completing This Task

Here are other links to tasks related to goal management.

Related Links
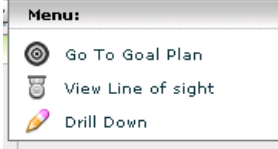
- Goal Management
- Removing an Item
- Viewing further Details
- Goal Fields and Buttons

Goal Management Fields and Buttons

All fields shown in the Goals section of Taleo Performance are presented in the table below, along with a description and related possible values, when predefined. Each field also indicates the type of information it applies to and the related header.

Field	Description	Applicable to	Header
Organization menu Organization: Canadian Operations	This menu allows you to display business goals according to a selected organization.	Business Goals	Business Goals
Year menu 2007-2008	This menu allows you to display goals according to a specific period.	Business Goals; Employee Goals	Business Goals; Employee Goals
Identifier menu Michael Decker	The identifier menu displays thename of the employee goals or business projects' owner.	My Projects; Employee Goals	My Projects; Employee Goals
Go to menu Employee Goals	This menu allows to access various elements of the employee.	Employee Goals	Employee Goals
Talent Profile	Select this option to access the employee's talent profile.	Employee Goals	Employee Goals
Performance Review	Select this option to access the employee's performance review.	Employee Goals	Employee Goals
Position Profile	Select this option to access the employee's position profile.	Employee Goals	Employee Goals

Field	Description	Applicable to	Header
Name	This field is where you enter a name for the new goal, sub-goal, business project, etc.	Goals	Create a new goal window; Create a new business project; Create a new milestone; Business Project Details window
Description	This field is where you enter a description for the new goal, sub-goal, business project, etc.	Goals	Create a new goal window; Create a new business project; Create a new milestone
Business Theme (Business goals and sub-goals)	This menu is where you select a business them for your business goal or business sub-goal.	Goals	Create a new goal window
Start Date	Indicates the date when the progression of the goal, sub-goal, or business project starts being calculated.	Goals	Create a new goal window; Create a new business project; Business Project Details, Description
Due Date	Indicates the date scheduled for the goal, sub-goal, business project, etc., to be achieved.	Goals	Create a new goal window; Create a new business project; Create a new milestone; Business Project Details window
OK	Click OK to confirm the creation of the new goal, sub-goal, business project, etc.	Goals	Create a new goal window; Create a new business project; Create a new milestone
Cancel	Click Cancel to close the window without creating the goal, sub-goal, business project, etc.	Goals	Create a new goal window; Create a new business project; Create a new milestone
Save icon	Click this icon to save the modifications that you made to a business project in the Business Project Details window.	Goals	My Projects
Cancel icon	Click this icon to cancel the modifications that you made to a business project in the Business Project Details window.	Goals	My Projects
Display mode icon	The display mode icons offer three ways to display the business project information: list mode, card mode or timeline mode.	Goals	My Projects

Field	Description	Applicable to	Header
List mode icon	The list modedisplays the list of business projects with information on key dates and progress.	Goals	My Projects
Card mode icon	The card mode provides select details on a single business project at a time with the ability to edit progress.	Business Projects	My Projects
Timeline mode icon	The timeline mode provides a timeline view of business projects start and due dates.	Business Projects	My Projects
Business Projects	Indicates the name of the business project.	Business Projects	My Projects
Start Date	Indicates the date when the progression of the business project starts being calculated.	Business Projects	My Projects
Due Date	Indicates the date scheduled for the business project to be achieved.	Business Projects	My Projects
Progress	This progress bar indicates the level of progression towards business project achievement.	Business Projects	My Projects; Business project Details
Create a new business project icon	Click this icon to create a new business project. The Create a new business project window is displayed.	Business Projects	My Projects
Create a new business sub-project icon	Click this icon to create a new business sub-project. The Create a new business project window is displayed.	Business Projects	My Projects
Create a new milestone icon	Click this icon to create a new milestone. The Create a new milestone window is displayed.	Business Projects	My Projects
Remove the item icon	Click this icon to remove a selected item (project, milestone, etc.). A confirmation message is displayed after clicking the icon.	Business Projects	My Projects
More details icon	Click this icon to open the Details window, where you can provide more thorough information.	Business Projects	My Projects
Critical icon	This icon indicates that the project is crucial.	Business Projects	My Projects; Business Project Details
Aligned icon	This icon indicates that the business project is aligned with a business goal, whose name is indicated in the tooltip	Business Projects	My Projects; Business Project Details
Align to:	This box is where you can see to which business goal your business project is aligned.	Business Projects	My Projects, Card mode; Business Project Details, Alignment
menu Menu: Go To Goal Plan View Line of sight Drill Down	This menu allows you to perform a number of operations on a project.	Business Projects	My Projects, Timeline mode
Go To Goal Plan	Click this option to access the list of Employee Goals.	Business Projects	My Projects, Timeline mode

Field	Description	Applicable to	Header
View Line of sight	Click this option to view what the business project is aligned with.	Business Projects	My Projects, Timeline mode
Drill Down/Drill Up	Click this option to look downward or upward at what is aligned to you.	Business Projects	My Projects, Timeline mode
Show Tools icon	Click the Show Tools icon to see the Alignment ands Comments panels.	Business Projects	Business Project Details
Hide Tools	Click this link to hide the Alignment and Comments panels.	Business Projects	Business Project Details
Alignment	This panel is where you choose the business goal to which you can align your business project.	Business Projects	Business Project Details
Comments	The Comments panel allows you to see comments for this business project.	Business Projects	Business Project Details
Owner	This field indicates who created the business project	Business Projects	Business Project Details
Description	This field allows you to write a description of the business project.	Business Projects	Business Project Details
Critical menu	This menu is where you can decide whether the goal is critical (Yes) or not (No).	Business Projects	Business Project Details, Description
Alignment	This section is where you can see the alignment of your business project.	Business Projects	Business Project Details, Alignment
Clear	Use this button to clear the current alignment and make a new one.	Business Projects	Business Project Details, Alignment
Team	This section allows you to see the members of your team. It also allows you to add or delete members.	Business Projects	Business Project Details, Team
Add Member	Click this button to add a member to the team. The Select an employee window is displayed.	Business Projects	Business Project Details, Team
Delete Member	Click this button to delete a team member. A confirmation window is displayed.	Business Projects	Business Project Details, Team
Name	This field indicates the name of the team member.	Business Projects	Business Project Details, Team
Team Member menu	This menu allows you to access various elements of the team member.	Business Projects	Business Project Details, Team
Talent Profile	Click this option to access the team member's talent profile.	Business Projects	Business Project Details, Team
Employee Goals	Click this option to access the team member's goals.	Business Projects	Business Project Details, Team

Field	Description	Applicable to	Header
Performance Review	Click this option to access the team member's performance review.	Business Projects	Business Project Details, Team
Position Profile	Click this option to access the team member's position profile.	Business Projects	Business Project Details, Team
Sucession Plan	Click this option to access the team member's succession plan.	Business Projects	Business Project Details, Team
Average Progress	This field indicates the average progress in goal completion of the team member.	Business Projects	Business Project Details, Team
Milestone	This section allows you to see all the milestones linked to the project.	Business Projects	Business Project Details, Milestone
Name	This field indicates the name of the milestone	Business Projects	Business Project Details, Milestone
End Date	This field indicates the end date set for the milestone.	Business Projects	Business Project Details, Milestone
Cancel	Click this button to cancel your selection.	Select an employee	Select an employee
Select	Click this button to select an employee.	Select an employee	Select an employee
Search field	Enter the name of an employee in this field.	Select an employee	Select an employee
Search button	Click this button to search for the employee whose name was entered in the Search field.	Select an employee	Select an employee
About	This field indicates for which employee goal the feedback is requested.	Request Feedback	Request Feedback
To...	Click this button to select the recipients for your feedback request.	Request Feedback	Request Feedback
Employee Goals	Click this option to access the team member's goals.	Business Projects	Business Project Details, Team
Performance Review	Click this option to access the team member's performance review.	Business Projects	Business Project Details, Team
Position Profile	Click this option to access the team member's position profile.	Business Projects	Business Project Details, Team
Sucession Plan	Click this option to access the team member's succession plan.	Business Projects	Business Project Details, Team
Average Progress	This field indicates the average progress of the team member.	Business Projects	Business Project Details, Team
Milestone	This section allows you to see all the milestones linked to the project.	Business Projects	Business Project Details, Milestone
Name	This field indicates the name of the milestone	Business Projects	Business Project Details, Milestone
End Date	This field indicates the end date set for the milestone.	Business Projects	Business Project Details, Milestone
Cancel	Click this button to cancel your selection.	Select an employee	Select an employee
Select	Click this button to select an employee.	Select an employee	Select an employee

Field	Description	Applicable to	Header
Search field	Enter the name of an employee in this field.	Select an employee	Select an employee
Search button	Click this button to search for the employee whose name was entered in the Search field.	Select an employee	Select an employee
About	This field indicates for which employee goal the feedback is requested.	Request Feedback	Request Feedback
To...	Click this button to select the recipients for your feedback request.	Request Feedback	Request Feedback
Due Date	This field indicates the date when all feedback must have been sent.	Request Feedback	Request Feedback
Priority menu.	In this menu you can select a level of priority for your feedback request.	Request Feedback	Request Feedback
High	This means that the feedback must be adressed in priority.	Request Feedback	Request Feedback
Normal	This means that the feedback request is required within a normal delay.	Request Feedback	Request Feedback
Low	This means that the feedback request is not urgent.	Request Feedback	Request Feedback
Ask feedback about:	This field contains details of the goal for wich feedback is requested.	Request Feedback	Request Feedback
Your comment:	This field is where you can enter a comment to provide further explanations.	Request Feedback	Request Feedback
Send Request	Click this button to send your feedback request.	Request Feedback	Request Feedback
Cancel	Click this button to close the window without sending a feedback request.	Request Feedback	Request Feedback
My Network/People Picker	This menu allows you to decide from which list you want to select your recipient(s).	Request Feedback	Recipient selection window
My Network/People Picker	This menu allows you to decide from which list you want to select your recipient(s).	Request Feedback	Recipient selection window
My Network	The My Network option lists the name of all people in your network.	Request Feedback	Recipient selection window
People Picker	The People Picker option allows you to search for a recipient who is not necessarily part of your network.	Request Feedback	Recipient selection window
Add icon	Click this icon to add a recipient to the selection cart.	Request Feedback	Recipient selection window
Remove icon	Click this icon to remove a recipient from the selection cart.	Request Feedback	Recipient selection window
Save	Click this button to save y our selection.	Request Feedback	Recipient selection window
Cancel	Clilck this button to close the window without saving your selection.	Request Feedback	Recipient selection window

Working with Employee Goals

Employee or Individual Goals

Individual employees can also have goals, which like business goals are qualitative or quantitative statements of the employee's intent or objectives. Individual goals require collaboration between the manager and employee to develop goals for a given period.

Detailed Description

Individuals can personalize their goals so that they are aligned to their manager's goals, business goals or project goals to further their career objectives.

Benefits

- Collaboration
  A key differentiator for Taleo is our "whiteboard" approach to collaboration. Rather than a traditional workflow for managing the goal creation phase, both employee and manager can collaborate on the employee's goal plan and acknowledge when both are satisfied with the plan.

Creating an Employee Goal

You can create your personal goals, which will later be aligned with the business goals of your organization.

Prerequisite

Employee Home page

1. In the Quick Links section, click My Goals.

   The Employee Goals page is displayed.

2. Click ![icon].

3. In the Create a new goal page, fill in the information about the new goal.

4. Click OK.

Result

The new employee goal is now displayed in the Employee Goals page.

After Completing This Task

Here are links to other tasks related to employee goals.

Related Links

- Employee or Individual Goals
- Creating an Employee Sub-Goal
- Editing an Employee Goal or Sub-Goal
- Employee Goal Fields and Buttons

Creating an Employee Sub-Goal

You can create sub-goals to employee goals.

Prerequisite

An employee goal must exist in order to create a sub-goal.

Employee Goals

1. In the Employee Goals page, place your cursor on the goal for which you want to create a sub-goal.

2. Click .

3. In the Create a new goal page, fill in the information about the new sub-goal.

4. Click OK.

Result

The new employee sub-goal is now displayed in the Employee Goals page.

After Completing This Task

Here are links to other tasks related to employee goals.

Related Links

- Employee or Individual Goals
- Editing an Employee Goal or Sub-Goal
- Aligning an Employee Goal
- Employee Goal Fields and Buttons

Editing an Employee Goal or Sub-Goal

You can modify the information contained in a goal or a sub-goal.

Prerequisite

Employee Goals

1. In the Employee Goals page, place your cursor on the goal or sub-goal that you want to edit.

2. Click .

3. In the Employee Goal Details page, make the appropriate modifications to your goal or sub-goal.

4. Click .

5. Click OK in the confirmation window.

Result

Your modifications are now saved.

After Completing This Task

Here are links to other tasks related to employee goals.

Related Links

- Employee or Individual Goals
- Creating an Employee Goal
- Aligning an Employee Goal
- Employee Goal Fields and Buttons

Aligning an Employee Goal

Alignment is to show that a subordinates' efforts are in support of the goal being aligned with. You can align one of your goals with a business project, a business goal of your organization or one of your manager's goals.

Prerequisite

Employee Goals

1. In the Employee Goals page, place your cursor on the goal or sub-goal that you want to align.

2. Click .

3. In the Employee Goal Details page, click .

4. In the Alignment panel, select the appropriate business goal or business project and drag and drop it into the Alignment section of the Employee Goal Details page.

You can align your goal with both a business goal and a business project.

5. Click .

6. Click OK in the confirmation window that displays.

Result

Your goal is now aligned with the selected goal or project.

After Completing This Task

Here are links to other tasks related to employee goals.

Related Links

- Employee or Individual Goals
- Creating an Employee Goal
- Editing an Employee Goal or Sub-Goal
- Employee Goal Fields and Buttons

Requesting Feedback

It is possible to request feedback for an employee goal or sub-goal.

Prerequisite

There

1. In the Employee Goals list, place your cursor on the goal or sub-goal for which you want to request feedback.

2. Click .

3. In the Feedback panel, click .

4. In the Request Feedback window, click To... to select a recipient for your feedback request.

5. Enter a due date for the feedback, a priority and comments if appropriate.

   You can format the comment text with the formating tools.

6. Click Send Request.

Result

Your feedback request is now sent.

After Completing This Task

Here are other tasks related to employee goals.

Related Links

- Employee or Individual Goals
- Creating an Employee Goal
- Creating an Employee Sub-Goal
- Editing an Employee Goal or Sub-Goal
- Employee Goal Fields and Buttons
- Goal Management Fields and Buttons

Employee Goal Fields and Buttons

All fields shown in the Employee Goals section of Taleo Performance are presented in the table below, along with a description and related possible values, when predefined. Each field also indicates the type of information it applies to and the related header.

Field	Description	Applicable to	Header
Save icon	Click this icon to save the modifications that you made to an employee goal in the Employee Goals Details window.	Employee Goals	Employee Goals; Employee Goals Details
Cancel icon	Click this icon to cancel the modifications that you made to an employee goal in the Employee Goals Details window.	Employee Goals	Employee Goals; Employee Goals Details
Actions menu	The Actions menu is where you can decide on the approval of a goal.	Employee Goals	Employee Goals
Decide on approval	Select this option to either accept or reject an employee goal. The Request Approval window is displayed.	Employee Goals	Employee Goals
Display mode icons	The display mode icons offer three ways to display the goal information: list mode, card mode or timeline mode.	Employee Goals	Employee Goals
List mode icon	The list modedisplays the list of goals with information on key dates and progress.	Employee Goals	Employee Goals
Card mode icon	The card mode provides select details on a single goal at a time with the ability to edit progres.	Employee Goals	Employee Goals
Timeline mode icon	The timeline mode provides a timeline view of goals start and due dates.	Employee Goals	Employee Goals

Field	Description	Applicable to	Header
Show tools icon	Click the Show Tools icon to see the Feedback and Alignment panels	Employee Goals	Employee Goals; Employee Goals Details
Hide Tools	Click this link to hide the Feedback and Alignment panels	Employee Goals	Employee Goals; Employee Goals Details
Feedback	This panel provides information on feedback received for the goal. You can also request feedback for the goal from this panel.	Employee Goals	Employee Goals; Employee Goals Details
Author Date menu	This menu allows you to sort received feedback by author or date.	Employee Goals	Employee Goals; Employee Goals Details
Request Feedback icon	Click this icon to request feedback for the goal. The Request Feedback window is displayed.	Employee Goals	Employee Goals; Employee Goals Details
Alignment	This panel is where you choose the business goal or business project to which you can align your goal.	Employee Goals	Employee Goals; Employee Goals Details
Goal Name	Indicates the name of the employee goal.	Employee Goals	Employee Goals; Employee Goals Details
Sart Date	Indicates the date when the progression of the goal starts being calculated.	Employee Goals	Employee Goals; Employee Goal Details; Card mode
Due Date	Indicates the date scheduled for the goal to be achieved.	Employee Goals	Employee Goals; Employee Goal Details; Card mode
Status	Indicates the goal status.	Employee Goals	Employee Goals; Employee Goal Details
Not Started	Indicates that the achievement of this goal is not yet started.	Employee Goals	Employee Goals; Employee Goal Details; Card mode
In Progress	Indicates that the goal is being achieved.	Employee Goals	Employee Goals; Employee Goal Details; Card mode
Completed	Indicates that the goal is achieved.	Employee Goals	Employee Goals; Employee Goal Details; Card mode
Canceled	Indicates that this goal has been removed from the goal plan.	Employee Goals	Employee Goals; Employee Goal Details; Card mode

Field	Description	Applicable to	Header
Progress	This progress bar indicates the level of progression towards goal achievement.	Employee Goals	Employee Goals; Employee Goal Details
Create a new goal icon	Click this icon to create a new goal. The Create a new goal window is displayed.	Employee Goals	Employee Goals; Employee Goals Details
Create a sub-goal icon	Click this icon to create a new sub-goal. The Create a new goal window is displayed.	Employee Goals	Employee Goals
Remove the item icon	Click this icon to remove a selected item (goal, project, milestone, etc.). A confirmation message is displayed after clicking the icon.	Employee Goals	Employee Goals; Feedback panel
More details	Click this icon to open the Details window, where you can provide more thorough information.	Employee Goals	Employee Goals
Critical icon	This icon indicates that the goal is crucial.	Employee Goals	Employee Goals; Employee Goal Details
Lat e icon	This icon indicates that the employee is late in the achievment of the goal.	Employee Goals	Employee Goals
Not aligned icon	This icon indicates that the employee goal is not aligned with a business goal or a business project.	Employee Goals	Employee Goals
Aligned icon	This icon indicates that the employee goal is aligned with a business goal lor a business project, whose name is indicated in the tooltip.	Employee Goals	Employee Goals
Status menu Not Started	This menu allows you to set a status for a goal.	Employee Goals	Card mode
Description	This field allows you to write a description of the goal.	Employee Goals	Card mode;
Comments	This section is where you can see the comments for the goal.	Employee Goals	Card mode
Add comment icon	Click this icon to add a comment. The Add Comment window is displayed.	Employee Goals	Card mode
Align to	This box is where you can see to which business goal or business project your goal is aligned.	Employee Goals	Card mode; Employee Goal Details, Alignment
Clear	This button allows you to clear the content of the Align to box.	Employee Goals	Card mode; Employee Goal Details, Alignment
menu Menu: Edit Details View Line of sight Drill Down	This menu allows you to perform a number of operations on a goal.	Employee Goals	Timeline mode
Edit Details	Click this option to open de Employee Goal Details page.	Employee Goals	Timeline mode

Field	Description	Applicable to	Header
View Line of sight	Click this option to see what this employee goal is aligned with.	Employee Goals	Timeline mode
Drill Down/Drill Up	Click this option to look downward or upward at what is aligned to you.	Employee Goals	Timeline mode
Owner	This field indicates who created the goal.	Employee Goals	Employee Goal Details, Specifications
Specifications	This field is where you can provide details on the goal.	Employee Goals	Employee Goal Details, Specifications
Critical menu	This menu is where you can decide whether the goal is critical (Yes) or not (No).	Employee Goals	Employee Goal Details, Specifications
Measurement	This section describes whether the goal is qualitative or qantitative.	Employee Goals	Employee Goal Details, Measurement
Quantitative menu Quantitative ▼	This menu is where you can decide whether your goal is quantitative or qualitative.	Employee Goals	Employee Goal Details, Measurement
Quantitative	Select quantitative to enter a specific target to be achieved.	Employee Goals	Employee Goal Details, Measurement
Qualitative	Select qualitative to provide a text-based measurement.	Employee Goals	Employee Goal Details, Measurement
Measurement Text	This field is where you enter your target or text-based measurement.	Employee Goals	Employee Goal Details, Measurement
Actual Value	For the quantitative option. Indicates the actual completion of the goal.	Employee Goals	Employee Goal Details, Measurement
Target Value	For the quantitative option. Indicates the level of achievement set for the goal.	Employee Goals	Employee Goal Details, Measurement
Variance	For the quantitative option. The variance is a percentage calculation of progress based on the Actual value / Target value.	Employee Goals	Employee Goal Details, Measurement
Progress	For the qualitative option. This progress bar indicates the level of progression towards goal achievement. You can use the arrow to set the appropriate progression.	Employee Goals	Employee Goal Details, Measurement
Alignment	This section is where you can see the alignment of your goal.	Employee Goals	Employee Goal Details, Alignment
Aligned to me:	This field is where you can see the business goals or projects aligned to you.	Employee Goals	Employee Goal Details, Alignment

Field	Description	Applicable to	Header
Sub-Goals	This section lists all the existing sub-goals of a goal.	Employee Goals	Employee Goal Details, Alignment

Working with Business Goals

Business Goals

Business Goals are qualitative or quantitative statements of an organization's intent or objectives, for example "Increase Operational Efficiency 5%."

Detailed Description

A user with Business Goal rights has the ability to create goals for the Organization that he is a member of or for subordinate organizations.

All goals are contained within a goal period. The goal period is a "container" that typically mirrors the time period in which the organization evaluates employees. It reflects the period in which the goals will be worked on, and in most cases, the goals are expected to be completed in that period. In some cases, a goal may span multiple periods.

Business Goals provides three modes: a list of goals, a goal "vCard" that allows for the rapid update of progress, and a Gantt timeline of goal start and end date. The Gantt view allows drag and drop functionality to adjust the start and end dates of goals. Hovering over a goal in Gantt mode displays a summary of the goal alignment, dates and progress. The detail of the goal can be accessed by double-clicking the goal from any of these modes.

A business goal can be either quantitative or qualitative. In a qualitative goal, the end user provides a text based measurement. For example, in the goal "Increase Employee Visibility into Corporate Plans" the measurement could include a description of training programs to be held and other strategies. In short, the goal does not have a detailed measurement by which success can be measured. Progress is manually entered for qualitative goals.

In a quantitative goal, the user enters a specific target to be achieved. For example, in the goal "Reduce employee voluntary turnover 5%", the target is 5%. To measure progress, the user must also enter an Actual value. The variance is a percentage calculation of progress based on the Actual value / Target value.

The user can update status to a business goal using either the vCard view or the goal detail. For quantitative goals, the status is updated by entering a value. For quantitative goals, the progress is manually adjusted. In either case, the user can enter a comment in addition to or in lieu of adjusting the progress. A full history of comments is accessible on the goal detail.

There are two forms of goal alignment: Goal alignment within an organization and goal alignment across organizations. As an example of goal alignment within a department, within the PMG team, there may be a goal to release 4 SPs in a year. Aligned to that goal might be the goal to release performance management. As an example of goal alignment across departments, R&D might have a goal of Customer Satisfaction. The PMG (a department within R&D) goal of releasing 4 SPs might be aligned to that as might Developments goals around Quality levels per product.

Alignment can be done on the goal detail screen or using the Supporting tools on the Goal card view.

Goals can be created for sub-organizations by first navigating to the subordinate organization using the Breadcrumbs.

Creating a Business Goal

You can create business goals, which can later be aligned with the business projects of your organization.

Prerequisite

Employee Home page

1. In the Quick Links section, click Business Goals.

    The Business Goals page is displayed.

2. Click .

3. In the Create a new goal page, fill in the information about the new goal.

4. Click OK.

Result

The new goal is now displayed in the Business Goals page.

After Completing This Task

Here are links to other tasks related to business goals.

Related Links

*   Business Goals
*   Creating a Business Sub-Goal
*   Editing a Business Goal or Sub-Goal
*   Business Goals Fields and Buttons

Creating a Business Sub-Goal

You can create business sub-goals to your business goals.

Prerequisite

A business goal must exist in order to create a sub-goal.

Employee Goals

1. In the Business Goals page, place your cursor on the goal for which you want to create a sub-goal.

2. Click .

3. In the Create a new goal page, fill in the information about the new sub-goal.

4. Click OK.

Result

The new business sub-goal is now displayed in the Business Goals page.

After Completing This Task

Here are links to other tasks related to business goals.

Related Links

- Business Goals
- Editing a Business Goal or Sub-Goal
- Business Goals Fields and Buttons

Editing a Business Goal or Sub-Goal

You can modify the information contained in a goal or a sub-goal.

Prerequisite

Business Goals

1. In the Business Goals page, place your cursor on the goal or sub-goal that you want to edit.

2. Click .

3. In the Business Goal Details page, make the appropriate modifications to your goal or sub-goal.

4. Click .

5. Click OK in the confirmation window.

Result

Your modifications are now saved.

After Completing This Task

Here are links to other tasks related to employee goals.

Related Links

- Business Goals
- Creating a Business Goal
- Business Goals Fields and Buttons

Creating a Business Project from the My Projects Page

You can create business projects. Projects provide the ability to assign a project owner and assign goals directly to employees working on the project.

Prerequisite

Employee Home Page

1. In the Quick Links section, click My Projects.

   The My Projects page is displayed.

2. Click [icon].

3. In the Create a new business project page, fill in the information about the new project.

4. Click OK.

Result

The new business project is now displayed in the My Projects page.

After Completing This Task

Here are links to other tasks related to business goals.

Related Links

- Business Goals
- Creating a Milestone
- Creating a Business Goal
- Business Goals Fields and Buttons
- Goal Management Fields and Buttons

Creating a Business Project from the Business Goals Page

You can create business projects. Projects provide the ability to assign a project owner and assign goals directly to employees working on the project.

Prerequisite

Employee Home Page

1. In the Quick Links section, click Business Goals.

   The Business Goals page is displayed.

2. Place your cursor on the goal for which you want to create a business project.

3. Click [icon].

4. In the Create a new business project page, fill in the information about the new project.

5. Click OK.

Result

The new business project is now displayed in the Business Goals page.

After Completing This Task

Here are links to other tasks related to business goals.

Related Links

- Business Goals
- Creating a Milestone
- Creating a Business Goal
- Business Goals Fields and Buttons

Creating a Business Sub-Project

You can create business sub-projects. Projects provide the ability to assign a project owner and assign goals directly to employees working on the project.

Prerequisite

Employee Home Page

1. In the Quick Links section, click My Projects.

   The My Projects page is displayed.

2. Place your cursor on the projec for which you want to create a sub-project.

3. Click .

4. In the Create a new business project page, fill in the information about the new project.

5. Click OK.

Result

The new business sub-project is now displayed in the My Projects page.

After Completing This Task

Here are links to other tasks related to business goals.

Related Links

- Business Goals
- Creating a Milestone
- Creating a Business Goal
- Creating a Business Project from the My Projects Page
- Business Goals Fields and Buttons
- Goal Management Fields and Buttons

Aligning a Project or Sub-Project

A project can be aligned to a business goal.

Prerequisite

Business Project Details

1. In the Business Goals page or My Projects page, place your cursor on the goal or sub-goal that you want to align.

2. Click .

3. In the Business Project Details page, click .

4. In the Alignment panel, select the appropriate business goal, and drag and drop it into the Alignment section of the Business Project Details page.

5. Click .

6. Click OK in the confirmation window that displays.

Result

Your project is now aligned with the selected goal.

After Completing This Task

Here are links to other tasks related to goal management.

Related Links

- Business Goals
- Creating a Business Project from the My Projects Page
- Creating a Business Project from the Business Goals Page
- Business Goals Fields and Buttons
- Goal Management Fields and Buttons

Creating a Milestone

A milestone is an element that marks the completion of a specific work package or phase. You can create milestone for your business projects.

Prerequisite

A project or sub-project must exist in order to create a milestone.

Business Goals Page or My Projects Page

1. Place your cursor on the project or sub-project for which you want to create a milestone.

2. Click .

3. In the Create a new milestone page, fill in the information about the new milestone.

4. Click OK.

Result

The new milestone is now displayed underneath the project or sub-project.

After Completing This Task

Here are other links to tasks related to business goals.

Related Links

- Business Goals
- Creating a Business Project from the My Projects Page
- Creating a Business Project from the Business Goals Page
- Business Goals Fields and Buttons
- Goal Management Fields and Buttons

Business Goals Fields and Buttons

All fields shown in the Business Goals section of Taleo Performance are presented in the table below, along with a description and related possible values, when predefined. Each field also indicates the type of information it applies to and the related header.

Field	Description	Applicable to	Header
Save icon	Click this icon to save the modifications that you made to an employee goal in the Employee Goals Details window.	Business Goals	Business Goals
Cancel icon	Click this icon to cancel the modifications that you made to an employee goal in the Employee Goals Details window.	Business Goals	Business Goals
Display mode icons	The display mode icons offer three ways to display the goal information: list mode, card mode or timeline mode.	Business Goals	Business Goals
List mode icon	The list modedisplays the list of goals with information on key dates and progress.	Business Goals	Business Goals
Card mode icon	The card mode provides select details on a single goal at a time with the ability to edit progres.	Business Goals	Business Goals
Timeline mode icon	The timeline mode provides a timeline view of goals start and due dates.	Business Goals	Business Goals
Goal Name	Indicates the name of the business goal.	Business Goals	Business Goals
Sart Date	Indicates the date when the progression of the goal starts being calculated.	Business Goals	Business Goals
Due Date	Indicates the date scheduled for the goal to be achieved.	Business Goals	Business Goals

Field	Description	Applicable to	Header
Status	Indicates the goal status.	Business Goals	Business Goals
Not Started	Indicates that the achievement of this goal is not yet started.	Business Goals	Business Goals
In Progress	Indicates that the goal is being achieved.	Business Goals	Business Goals
Completed	Indicates that the goal is achieved.	Business Goals	Business Goals
Canceled	Indicates that this goal has been removed from the goal plan.	Business Goals	Business Goals
Progress	The progress bar indicates the level of progression towards goal completion.	Business Goals	Business Goals
Create a new goal icon	Click this icon to create a new goal. The Create a new goal window is displayed.	Business Goals	Business Goals
Create a sub-goal icon	Click this icon to create a new sub-goal. The Create a new goal window is displayed.	Business Goals	Business Goals
Create a new business project icon	Click this icon to create a new business project. The Create a new business project window is displayed.	Business Goals	Business Goals; My Projects
Create a new milestone icon	Click this icon to create a new milestone. The Create a new milestone window is displayed.	Business Goals	Business Goals; My Projects
Remove the item icon	Click this icon to remove a selected item (goal, project, milestone, etc.). A confirmation message is displayed after clicking the icon.	Business Goals	Business Goals
More details	Click this icon to open the Details window, where you can provide more thorough information.	Business Goals	Business Goals
Critical icon	This icon indicates that the goal is crucial.	Business Goals	Business Goals; Business Goal Details
Aligned icon	This icon indicates that the business goal is aligned with a business theme, whose name is indicated in the tooltip.	Business Goals	Business Goals; Business Goal Details
Target Value	For the quantitative option. Indicates the level of achievement set for the goal.	Business Goals	Card mode, Business Goal Details, Measurement
Actual Value	For the quantitative option. Indicates the actual completion of the goal.	Business Goals	Card mode, Business Goal Details, Measurement
Description	This field allows you to write a description of the goal.	Business Goals	Card mode
menu Menu: Edit Details View Line of sight Drill Down	This menu allows you to perform a number of operations on a goal.	Business Goals	Timeline mode
Edit Details	Click this option to open the Business Goal Details page.	Business Goals	Timeline mode

Field	Description	Applicable to	Header
View Line of sight	Click this option to see what the business goal is aligned with.	Business Goals	Timeline mode
Drill Down/Drill Up	Click this option to look downward or upward at what is aligned to you.	Business Goals	Timeline mode
Show Tools icon	Click the Show Tools icon to see the Comments panel	Business Goals	Business Goal Details
Hide Tools	Click this link to hide the Comments panel	Business Goals	Business Goal Details
Comments panel	The Comments panel allows you to see comments for this business goal.	Business Goals	Business Goal Details
Status menu	This menu allows you to set a status for a goal.	Business Goals	Business Goal Details
Business Theme menu	This menu allows you to associate your goal to a business theme.	Business Goals	Business Goal Details
Organization menu	This menu allows you to associate your goal to an organization.	Business Goals	Business Goal Details
Specifications	This field is where you can provide details on the goal.	Business Goals	Business Goal Details, Specifications
Critical menu	This menu is where you can decide whether the goal is critical (Yes) or not (No).	Business Goals	Business Goal Details, Specifications
Measurement Text	This field is where you enter your target or text-based measurement.	Business Goals	Business Goal Details, Measurement
Variance	For the quantitative option. The variance is a percentage calculation of progress based on the Actual value / Target value.	Business Goals	Business Goal Details, Measurement
Progress	For the qualitative option. This progress bar indicates the level of progression towards goal achievement. You can use the arrow to set the appropriate progression	Business Goals	Business Goal Details, Measurement; Business Goal Details, Business Projects
Sub-Goals	This section lists all the existing sub-goals of a goal.	Business Goals	Business Goal Details, Sub-Goals
Business Projects	This section lists all the existing business projects.	Business Goals	Business Goal Details, Business Projects
Name	This field indicates the name of the business project	Business Goals	Business Goal Details, Business Projects
Project Lead	This field indicates the name of the project leader	Business Goals	Business Goal Details, Business Projects

Performance Review Management

3

Getting Started with Performance Review Management

Performance Review

A performance review is a formal record of an employee's development and performance for a given time period. Typically, it involves a review of an employee's performance and achievement in the last period and the creation of a plan of action for the next period.

Detailed Description

The performance review can include the review of goals, competencies and custom sections as defined by the organization. Custom sections can include items such as key performance indicators, development activities, survey questions, accomplishments, etc. The performance review is routed through a configurable workflow and approval cycles such that the final review is part of the employee's permanent employment record.

Benefits

- Flexible administration due to multiple review types, quick and simple review definition and complex workflow definitions that can suit any needs.

Related Links

- Review Definition
- Review Cycle

Rating

A rating is a mean used to evaluate an employee's result or progress on a given goal, competency or any other custom item presented in the performance review. Both the employee and the manager can provide a rating but only the manager's rating is used to calculate the review's overall rating.

Detailed Description

The selection of a rating model must be done from the list of predefined rating models, which are part of the foundation data needed to define a review definition.

When defining a review form, a rating model is selected for the overall rating of the review. A rating model can also be associated to each section and item within each section. The rating model can be the same throughout the entire review form or different for each section or item within the form.

Related Links

- Rating Model

- Weighting
- Review Section
- Section Item

Performance Review Page

The Performance Review page displays all the elements to be evaluated as part of the review and can be accessed in various manners, depending on what type of review you wish to view. All Performance Review pages present a Menu on the left panel and the main review in the center panel. On the right panel, it is possible to toggle the display of Tools, which offers the Feedback and Writing Assistant options.

Following is a brief overview of the main components of the Performance Review page.

1	The **Menu** displayed in the left panel shows all the components of the performance review form. Depending on the configuration of the review, the display of any section or item can vary, except for the Overview section that is always present. To provide a larger view of the main review page, it is possible to hide the Menu, along with the rest of the left panel, by clicking **Hide Card.**
2	If you are a manager or an administrator, this employee list menu allows you to select another employee's name to view the related employee performance review.
3	The **Go To Menu** allows you to move to another page of Taleo Performance for which you have access. The page displayed will correspond to the employee selected in the employee list menu (see 2 above).
4	The review list menu allows you to select another performance review form to be displayed in relation with the selected employee.
5	The completion button displays the current step to be performed and needs to be clicked for the review to proceed to the next step. Note that the text shown on the button depends on how it was configured. If configured to show, hovering over the task button will display the related tooltip, which offers the user instructions about the task to be completed.
6	The **Actions** list menu displays the other actions available in relation to the review, depending on your user type and corresponding permissions.
7	The tools icon gives you access to the **Tools** panel, which presents the Feedback and Writing Assistant options, when configured to be active.
8	The main window where is shown the Performance Review form.

Related Links

- Performance Review
- Rating

Opening a Performance Review

A performance review is accessed to either view existing completed reviews or to complete current reviews.

> Depending on your user type, the performance review that is displayed and the options offered might be different.

If you are an employee, see Opening a Performance Review as an Employee.

If you are a manager, see Opening a Performance Review as a Manager.

If you are an administratro, see Opening a Performance Review as an Administrator.

Related Links

- Opening a Performance Review as an Employee
- Opening a Performance Review as a Manager
- Opening a Performance Review as an Administrator

- Performance Review Page
- Performance Review Fields and Buttons

Viewing a Performance Review by Item

A performance review that is viewed by item shows each individual goal, competency and custom item separately in the review's main window. Note that the content of the Overview and Summary sections is never divided.

1. Open a performance review.

2. On the title line of the performance review, click the arrow next to Actions.

3. Select View, then click By Item.

    To display another item, select the desired item in the Menu box.

Result

The selected goal, competency or custom item is displayed in the main review window.

Related Links

- Opening a Performance Review
- Viewing a Performance Review by Section
- Viewing a Performance Review by Page
- Performance Review Fields and Buttons

Viewing a Performance Review by Section

A performance review that is viewed by section shows each section of the review on separate pages in the review's main window.

1. Open a performance review.

2. On the title line of the performance review, click the arrow next to Actions.

3. Select View, then click By Section.

    To display another section, select the desired section in the Menu box.

Result

The selected goal, competency or custom section is displayed in the main review window.

Related Links

- Opening a Performance Review
- Viewing a Performance Review by Item
- Viewing a Performance Review by Page

- Performance Review Fields and Buttons

Viewing a Performance Review by Page

A performance review that is viewed by page shows the entire revivew page in the review's main window.

1. Open a performance review.

2. On the title line of the performance review, click the arrow next to Actions.

3. Select View, then click Page.

    You will need to scroll through the page to view the desired information or select the section or item to be viewed in the Menu box.

Result

The entire performance review is displayed in the main review window.

Related Links

- Opening a Performance Review
- Viewing a Performance Review by Item
- Viewing a Performance Review by Section
- Performance Review Fields and Buttons

Viewing Employee Information Details

When viewing a performance review, you can choose to either show or hide the information about the employee who's review is in display. By default, this area is collapsed and no information is shown.

Prerequisite

For any field of the Employee Information area to be displayed in the Overview section of a review, the corresponding employee settings must be activated in the related review definition defined in Taleo Performance Administration.

1. Open a performance review.

2. In the Overview section, next to Employee Information, click Show Details or Hide Details to either display or hide all the information related to the employee who's review is displayed.

Related Links

- Opening a Performance Review
- Performance Review Fields and Buttons

Viewing the Detail Rating in Summary

When viewing a performance review, you can choose to either show or hide the ratings of each section or item in the Summary. The Summary of a Performance Review can include individual ratings for each section and the Summary of a each section can present individual ratings for each item. By default, all the detailed ratings are shown.

Prerequisite

For the Summary section of a review or of a section to be displayed, the related review definition settings must have been defined accordingly.

1. Open a performance review.

2. In the Menu box, select the Summary to be viewed, either the review's or a specific section's summary.

3. Click Show Detailed Rating or Hide Detailed Rating depending on whether you want to see or hide all the individual ratings in the Summary.

Related Links

- Opening a Performance Review
- Rating an Item of the Performance Review
- Performance Review Fields and Buttons

Viewing the Alignment of a Goal in a Performance Review

Viewing the alignment of a goal that is part of a performance review allows you to see what are the organizational efforts supporting the goal without having to navigate away from the performance review.

Prerequisite

To be able to view the alignment of a goal, the related review section setting must be activated for the link to show. Furthermore, the goal must have been auto-populated in the review from the employee's goal plan and not created dynamically in the review itself.

1. Open a performance review.

2. In the left panel Menu box, click the desired gaol section and then the goal for which you want to see the alignment.

3. In the main review panel, click View Alignment.

Result

The corresponding line of sight window will display the alignment of the goal.

Related Links

- Opening a Performance Review

- Performance Review Page
- Goal Alignment
- Performance Review Fields and Buttons

Performance Review Fields and Buttons

All fields related to Performance Reviews in Taleo Performance are presented in the table below, along with a description and related possible values, when predefined. Each field also indicates the type of information is applies to and the related header. All information in the table is alphabetically sorted by Field. **IMPORTANT** - Since most of the fields presented in a performance review are configurable and can be set to be shown or not, it is therefore possible that some fields do not show in a given review.

Field	Description	Applicable to	Header
Acknowledge	Optional workflow step done by the employee only that usually follows a review meeting and where the employee indicates his agreement with the review.	Performance Review	Workflow Status Bar
Actual	Actual progression value of the goal. This field applies to goals only.	Performance Review	Review Section
Approve	Optional workflow step done by the designated approver(s) who verify the accuracy and suitability of the review. Depending on the review request configuration, this step might not be part of the process definition, therefore not showing.	Performance Review	Workflow Status Bar
Author	Name of the author of the review, which corresponds to the employee, in the case of a self-assessment, or to the manager, in the case of employee performance review.	Performance Review	Current Review
Author ID	Identification number of the author of the review.	Performance Review	Current Review
Author Job Title	Job title of the author of the review.	Performance Review	Current Review
Business Unit	Business unit of the employee.	Performance Review	Employee Information
Close	Mandatory workflow step done by the manager and/or the employee that ends the review process. This step is always part of the process definition but might not show up in the workflow status if configured to be executed automatically.	Performance Review	Workflow Status Bar
Comments	Editing box used for entering comments related to the rating. To open the Comments box, double-click in the box.	Performance Review	Review Section
Compare	Action button that allows the manager to compare various elements in the current review with other those of other employees. The comparison can be done with various employees, depending on the selection made. This button only shows to managers.	Performance Review	Review Section
Compare with	Option list that allows to select the type of employees to compare the current review to.	Performance Review	Compare feature

Field	Description	Applicable to	Header
Current Step	Name of the task related to the current step in the review's workflow process.	Performance Review	Current Review
Current Step Due Date	Date the step in progress is due. This date is determined from the date the task is assigned and the duration allowed to complete the task, as per the review request configuration.	Performance Review	Current Review
Definition Code	Code of the review definition used as the performance review.	Performance Review	Current Review
Definition Title	Title given to the review definition when configured.	Performance Review	Current Review
Department	Department of the employee.	Performance Review	Employee Information
Employee ID	Identification number of the employee.	Performance Review	Employee Information
Employee Information	Section of the Overview that displays information about the employee whose review is in display. Use the Show Details or Hide Details to show or hide the information.	Performance Review	Employee Information
Employee's Self Rating	Rating given by the employee for his self-assessment of the goal, competency or custom item.	Performance Review	Review Section
From ... to ...	Start and end dates that correspond to the review's cycle.	Performance Review	Workflow Status Bar
Highest	Highest rating indicator.	Performance Review	Review Section
Include Indirect Reports	Checkbox that allows to include in the review comparison the indirect reports.	Performance Review	Compare feature
Include Self-Evaluation Ratings	Checkbox that allows to include in the review comparison the ratings from the employees self-assessments.	Performance Review	Compare feature
Job Field	Job field of the employee.	Performance Review	Employee Information
Job Level	Job level of the employee.	Performance Review	Employee Information
Job Title	Job title of the employee.	Performance Review	Employee Information
Lowest	Lowest rating indicator.	Performance Review	Review Section
Manager's Rating	Rating given by the manager when evaluating the the goal, competency or custom item of an employee. The manager's rating can only be seen in an employee performance review.	Performance Review	Review Section
Not Applicable	Checkbox that allows the rater, if the related permission is granted in the configuration, to mark an item as not applicable. Not applicable items will not be weighted nor be part of the section or overall rating calculation.	Performance Review	Review Section
Organization	Organization the employee works for.	Performance Review	Employee Information
Overall Rating	Overall rating calculated by the system for the entire review, based on the ratings for all sections. This field displays on the summary section of the review. The display of the associated detailed ratings can be toggled on or off with Hide/Show Detailed Rating.	Performance Review	Review Section

Field	Description	Applicable to	Header
Overview	Heading of the section that presents an overview of the current performance review, such as the information on the employee and on the review in display.	Performance Review	Overview
Progress	Progression percentage of the goal. This field applies to goals only.	Performance Review	Review Section
Release	Optional workflow step done by the manager and/or the employee that allows the user to decide when to expose the review to the other party, thus sending the review to the next configured step. Depending on the review request configuration, this step might not be part of the process definition or be set to execute automatically, therefore not showing.	Performance Review	Workflow Status Bar
Review Status	Status of the review as it goes through the review workflow process. The display of the statuses depends on the review request configuration. Possible review statuses are: • Draft • To be approved • Under approval • Approved • Released • Acknowledgement requested • Acknowledged • Closed	Performance Review	Current Review
Section Overall Rating	Overall rating calculated by the system for the related section. This field displays on the summary of each section. The display of the section's detailed ratings can be toggled on or off with Hide/Show Detailed Rating.	Performance Review	Review Section
Section Summary	Heading of the summary of each review section.	Performance Review	Review Section
Start Date	Date the goal starts to be evaluated. This field applies to goals only.	Performance Review	Review Section
Status	Progression status of the goal. This field applies to goals only. Possible statuses are: • In progress - the achievement of the goal is in progression. • Not Started - the achievement of the goal has not started. • Completed - the goal has been achieved. • Canceled - the goal has been canceled.	Performance Review	Review Section
Summary	Heading of the summary of the entire performance review.	Performance Review	Review Section
Update Employee Profile	Optional workflow step done by the manager only that consists of updating the employee's talent profile with the review's information. Depending on the review request configuration, this step might not be part of the process definition, therefore not showing.	Performance Review	Workflow Status Bar
Write Review	Mandatory workflow step done by the manager and/or the employee that consist of completing the review by entering the appropriate ratings and comments.This step must be completed by at least the manager. Whether the employee also completes a self-assessment is determined by the review request configuration.	Performance Review	Workflow Status Bar

Working with Performance Reviews

Opening a Performance Review as an Employee

The puprose of opening a performance review as an employee is to complete a current self-assessment or to view all your performance reviews.

As an employee, there are two different ways to access a performance review:

By using **Quick Links > My Performance Review**, if you want to view all of your performance reviews, whether they are in progress or past.

OR by using **My Tasks > Self-Assessment > Go to Performance Review**, if you want to open a specific review in progress, if you have any. Note that if you have no review in progress, the Self-Assessment task type will not show under My Tasks.

Related Links

- Performance Review Page
- Completing a Self-Assessment
- Performance Review Fields and Buttons

Opening a Performance Review as a Manager

The purpose of opening a performance review as a manager is to complete an employee's review or to view all the performance reviews of your direct and indirect reports.

As a manager, there are three different ways to access a performance review:

By using **Manager Center > Performance Review**, if you want to view all the performance reviews of your direct and indirect reports, whether the reviews are in progress or past.

OR by using **My Tasks > Employee Performance Review > Go to Performance Review**, if you want to open a specific employee's review in progress, if there are any. Note that if there is none, the Employee Performance Review task type will not show under My Tasks.

Related Links

- Performance Review Page
- Completing an Employee's Performance Review
- Approving an Employee's Performance Review
- Performance Review Fields and Buttons

Opening a Performance Review as an Administrator

Opening a performance review as an administrator allows to view the performance reviews as if you were another user and to complete or approve reviews that have been assigned to you.

As an administrator, there are different ways to access a performance review:

First, you will need to specify the name of the user you want to connect as in the Select an employee window if you want to view another user's account. The user you are connected as will show in parenthesis next to the main user name.

Via **Quick Links > My Performance Review**, if you want to view the performance reviews of the user you are connected as, whether that is yourself or another user. The first review shown will be the most recent one but it is possible to access all the reviews, whether they are in progress or past, by clicking the More arrow.

Via **My Tasks > Self-Assessment > Go to Performance Review**, if you want to view only your performance reviews in progress, if you have any. Note that if you have no review in progress, the Self-Assessment task type will not show under My Tasks.

Via **My Tasks > Employee Performance Review > Go to Performance Review**, if you want to view the performance reviews that are assigned to you for completion, if there is any. Note that if no current review has been assigned to you, the Employee Performance Review task type will not show under My Tasks.

Via **My Tasks > Approve Performance Review > Go to Performance Review**, if you want to view the performance reviews that are assigned to you for approval, if there is any. Note that if no current review has been assigned to you for approval, the Approve Performance Review task type will not show under My Tasks.

Related Links

- Performance Review Page
- Completing an Employee's Performance Review
- Approving an Employee's Performance Review
- Performance Review Fields and Buttons

Completing a Self-Assessment

The purpose of completing a self-assessment is for an employee to evaluate his/her own performance. The review is assigned to the employee based on how the review's workflow process is configured.

Prerequisite

To complete a self-assessment, one must have been assigned to you and should be displayed under My Tasks.

1. From My Tasks, click Self-Assessment.

2. In the selection box, scroll through the self-assessments if there is more than one by using or .

3. When the desired self-assessment has been located, click Go to Performance Review.

4. Once in the Performance Review page, you will first be presented with the Overview section of the review, which shows the review's workflow status.

5. Go through the entire review and provide your rating for all items of all sections by sliding the rater to the desired level.

6. As needed, or if required, provide comments about your rating by double-clicking in the Comments box.

   If uncertain about the comment text to enter, you can use the Writing Assistant from he Toolbox to get a list of existing texts to assist you if the related setting was activated for employees.

7. Make sure to click to save your ratings.

8. Once all your ratings and comments have been provided, click the task button to the right of to complete the current step.

9. Depending on the configuration of the review's workflow process, you might also be asked to release, acknowledge or close the review. If any or all of these tasks are not automatically executed, you will need to click the task button to the right of for the review to proceed to the next required step.

   Note that whenever a review is closed, whether by you or automatically, you cannot make any additional edits.

10. If you are required to release the review to the manager, you will be presented with a comment window to allow you to provide additional comments to the manager.

Result

If the task was completed successfully, a message to that effect will be displayed. When the self-assessment is complete, the Employee's tasks in the workflow status bar will all show a completed indicator .

Related Links

- Opening a Performance Review as an Employee
- Rating an Item of the Performance Review
- Performance Review Fields and Buttons

Completing an Employee's Performance Review

The purpose of completing an employee's performance review is for the manager to evaluate the performance of his/her direct reports. The review is assigned to the manager based on how the review's workflow process is configured.

Prerequisite

To complete an employee performance review, one must have been assigned to you and should be displayed under My Tasks. Furthermore, you must have a manager user type.

1. From My Tasks, click Employee Performance Review.

2. In the selection box, scroll through the employee performance reviews if there is more than one by using or .

3. When the desired employee performance review has been located, click Go to Performance Review.

4. Once in the Performance Review page, you will first be presented with the Overview section of the review, which shows the review's workflow status.

5. Go through the entire review and provide your rating for all items of all sections by sliding the rater to the desired level.

6. If needed or required, provide comments about your rating by double-clicking in the Comments box.

   If uncertain about the comment text to enter, you can use the Writing Assistant from he Toolbox to get a list of existing texts to assist you.

7. Again, if needed or required, if the review's has been configured to allow feedback request, you can asked other employees some feedback about the item to be evaluated to help you provide the most accurate rating. (See Requesting Feedback)

8. Make sure to click to save your ratings.

9. Once all your ratings and comments have been provided, click the task button to the right of to complete the current step.

10. Depending on the configuration of the review's workflow process, you might also be asked to release or close the review, and might need to send it for approval. If any or all of these tasks are not automatically executed, you will need to click the task button to the right of for the review to proceed to the next required step.

    Note that whenever a review is closed, whether by you or automatically, you cannot make any additional edits.

11. If you are required to release the review to the manager, you will be presented with a comment window to allow you to provide additional comments to the manager.

Result

If the task was completed successfully, a message to that effect will be displayed. When the self-assessment is complete, the Employee's tasks in the workflow status bar will all show a completed indicator .

Related Links

- Opening a Performance Review as a Manager
- Opening a Performance Review as an Administrator
- Rating an Item of the Performance Review
- Performance Review Fields and Buttons

Approving an Employee's Performance Review

The purpose of approving an employee's performance review is for a person other that the employee's manager to verify and approve the employee's performance review complete by the manager and the self-assessment completed by the employee if one is part of the review's workflow. The approbation task is only performed when part of the review's workflow process and is assigned to the specified approvers defined in the review request.

Prerequisite

To approve an employee performance review, one must have been assigned to you and should be displayed under My Tasks. Furthermore, you must have been defined as an approver in the related review request.

1. From My Tasks, click Approve Performance Review.

2. In the selection box, scroll through the employee performance reviews if there is more than one by using or .

3. When the desired employee performance review has been located, click Go to Performance Review.

4. Once in the Performance Review page, you will first be presented with the Overview section of the review, which shows the review's workflow status.

5. Go through the entire review and verify the provided ratings and comments.

    Note that no edits are allowed in the approval task.

6. Once you have completed your verification, click the task button to the right of to indicate whether you approve or reject the employee performance review and provide comments as needed.

7. Click Done.

Result

If the task was completed successfully, a message to that effect will be displayed. Also, Approver's tasks in the workflow status bar will show a completed indicator .

Related Links

- Opening a Performance Review
- Performance Review Fields and Buttons

Rating an Item of the Performance Review

When rating an item, you indicate your evaluation of the selected goal, competency or custom item

1. Open the performance review to evaluate.

2. In the Menu box, select the goal, competency of custom item to evaluate.

3. In the main review window, move the rater along the slider to the appropriate performance level.

4. Click .

5. Repeat for each item you wish to rate.

Result

All rated items are indicated by a checkmark in the Menu box.

Related Links

- Opening a Performance Review
- Performance Review Fields and Buttons

Entering Comments

Comments are entered to provide additional information about a rating attributed to a goal, a competency or a custom item, or to enter precisians about an overall rating related to a specific review section or to the entire review. As long as the review is not closed, comments can be entered by an employee, a manager or an approver, provided the comments are configured to be shown on the review. Furthermore, comments can be configured to be mandatory for a specific section or for all sections, in which case it is required for the review to proceed to the next step. However, if not configured to show, it won't be possible to enter comments.

1. Open a performance review.

2. In any Comments box shown in the review form, double-click in the box to open the editor.

3. Enter the desired comment text.

4. If needed, use any of the available editing options to format your text.

5. Click ☐ in the upright corner of the editor to close the Comments box.

6. Click 💾 to save your comments.

Result

The comment you have entered will display in the Comments box. If the comment was entered for a goal, a competency or a custom item, it will also show on the Summary of the corresponding section, underneath the name of the goal, competency or custom item.

Related Links

- Opening a Performance Review
- Performance Review Page
- Performance Review Fields and Buttons

Requesting Feedback

Feedback can be requested within a performance review to assist the rater in providing a better evaluation of a goal, competency or custom item.

1. Open the performance review of the employee for which you want to request feedback.

2. If the Tools panel is closed, click 🔧 to open it.

3. In the Feedback panel, click 👤 .

4. In the Request Feedback window, click To... to select a recipient for your feedback request.

5. Specify a due date and a priority level.

6. Check the items for which you want feedback.

7. As needed, create a new comment or edit the default one if provided and format the text with the available editing options.

8. Click Send Request.

Result

The recipient will receive a Feedback Request in their own My Tasks. Once the recipient has responded to the request and sent the feedback, you will see all the provided feedback in the Feedback panel of the relevant review.

Related Links

- Opening a Performance Review
- Performance Review Page
- Performance Review Fields and Buttons

Requesting Additional Ratings

Requesting additional ratings from other raters is similar to requesting feedback for a goal, a competency or a custom item to help the main rater to better evaluate the performance of an employee, except that the provided ratings are included in the review and not just displayed in the Feedback panel. The Request Multi-Rater feature is only available when configured to be active in the review request.

Prerequisite

To be able to request additional ratings, the Request Multi-Rater feature must be available under the Actions menu

1. Open the performance review of the employee for which you want to request feedback.

2. If the Tools panel is closed, click ⬚ to open it.

3. In the Feedback panel, click ⬚ .

4. In the Request Feedback window, click To... to select a recipient for your feedback request.

5. Specify a due date and a priority level.

6. Check the items for which you want feedback.

7. As needed, create a new comment or edit the default one if provided and format the text with the available editing options.

8. Click Send Request.

Result

The recipient will receive a Feedback Request in their own My Tasks. Once the recipient has responded to the request, provided a rating for the requested items and sent the feedback, you will see all the provided feedback in the Feedback panel of the relevant review as well as within the review form, with the applicable comments if any. If the request was sent to and responded by multiple raters, all will be displayed in the review for which it was asked.

Related Links

- Opening a Performance Review
- Performance Review Page
- Requesting Feedback
- Performance Review Fields and Buttons

Comparing Review Information

The Compare feature allows a manager to view a comparison of various review information when performing a review. It is possible for the manager to compare competencies, summary section

ratings, items that were configured to be part of a custom section and overall ratings for different groups of employees.

Prerequisite

Only managers have the possibility of comparing when they are completing an employee's performance review.

1. Open the performance review of the employee you wish to compare.

2. In the left panel Menu, click the section for which you want to compare the information.

3. Click Compare.

    The Compare button shows on the performance review title line, next to the Actions menu. If not shown, this means the Compare feature is not offered for that item.

4. Once the Compare button is clicked, the existing page is extended to show the additional information and options related to the Compare feature.

5. Specify the group of employees to compare the current employee to.

6. As needed, check the desired Include option.

Result

The information box will display all the employees to whom the current employee is compared to and the corresponding ratings for the selected item.

Related Links

*   Opening a Performance Review
*   Performance Review Page
*   Performance Review Fields and Buttons

Managing Goals within a Performance Review

The management of goals within a performance review is used to create or add new goals to be evaluated in the performance review or to edit or delete existing ones.

Prerequisite

To be able to manage goals within a performance review, the proper permissions must have been granted when the corresponding review section was configured. Furthermore, since the permissions to add (create implied), edit and delete are granted separately, one might have the permission to add but not to delete.

1. Open the performance review for which you want to manage goals.

2. In the left panel Menu, click on the name of the relevant goal section.

3. Next to the name of the goal section, click the down arrow.

4. In the displayed Actions list, click Manage Section Items.

5. In the relevant Manage section window, click Create or Add to either create or add a new goal or click ![x] or ![edit].to delete or edit a goal.

   If adding a new goal, a selector page will open to allow you to select the new goal from a list.

   If creating a new goal, a creation page will open and you will need to provide all the requested information.

   If deleting a goal, a message will ask you to confirm the deletion.

   If editing a goal, an editing page will open for you to make the required changes.

6. If a new goal was created, added or edited, click Done.

Result

The change made will be reflected in the relevant goal section.

Related Links

- Opening a Performance Review
- Performance Review Page
- Performance Review Fields and Buttons

Managing Competencies within a Performance Review

The management of competencies within a performance review can only be used to add new competencies in the performance review or delete existing ones.

Prerequisite

To be able to manage competencies within a performance review, the proper permissions must have been granted when the corresponding review section was configured. Furthermore, since the permissions to add and delete are granted separately, one might have the permission to add but not to delete.

Note that it is not possible to create new competencies, nor edit existing ones, as they must be selected from the existing competency library.

1. Open the performance review for which you want to manage competencies.

2. In the left panel Menu, click on the name of the relevant competency section.

3. Next to the name of the competency section, click the down arrow.

4. In the displayed Actions list, click Manage Section Items.

5. In the relevant Manage section window, click Add to add a new competency or click ![x] to delete a competency.

   If adding a new competency, a selector page will open to allow you to select the desired one from a list.

   If deleting a competency, a message will ask you to confirm the deletion.

6. If a new competency was selected to be added, click Done.

Result

The change made will be reflected in the relevant competency section.

Related Links

- Opening a Performance Review
- Performance Review Page
- Performance Review Fields and Buttons

Managing Custom Items within a Performance Review

The management of custom items within a performance review is used to create new custom items to be evaluated in the performance review or to edit or delete existing ones.

Prerequisite

To be able to manage custom items within a performance review, the proper permissions must have been granted when the corresponding review section was configured. Furthermore, since the permissions to add (create implied), edit and delete are granted separately, one might have the permission to create but not to delete.

Note that even if the permission to add was granted, one can only create new custom items and not add some from a list of existing items.

1. Open the performance review for which you want to manage custom items.

2. In the left panel Menu, click on the name of the relevant custom section.

3. Next to the name of the custom section, click the down arrow.

4. In the displayed Actions list, click Manage Section Items.

5. In the relevant Manage section window, click Create to create a new custom item or click or

    .to delete or edit an item.

    If creating a new custom item, a creation page will open and you will need to provide all the requested information.

    If deleting a custom item, a message will ask you to confirm the deletion.

    If editing a custom item, an editing page will open for you to make the required changes.

6. If a new custom item was created or edited, click Done.

Result

The change made will be reflected in the relevant custom section.

Related Links

- Opening a Performance Review
- Performance Review Page
- Performance Review Fields and Buttons

Printing a Performance Review

Printing a performance review can be done for any review and at any point in time. The printed version of the review will display all the information included in the review, whether the information is shown or hidden on the review at the time of printout. Furthermore, the printout information corresponds to the step in the review's workflow.

Prerequisite

To be able to see a print preview of a performance review, you need to have Acrobat Reader installed.

1. Open the performance review you wish to print.

2. On the title line of the performance review, click ▼ next to Actions.

3. Select Print.

Clicking on Print will launch Acrobat Reader.

Result

The performance review will display as a PDF file in Adobe Acrobat Reader and will be ready for printing.

After Completing This Task

Once displayed in Acrobat Reader, you can use any function available in the application.

Related Links

- Opening a Performance Review
- Performance Review Fields and Buttons

Succession Plan Management

4

In This Chapter

Working with Succession Plans

Succession Plan

Succession Planning is the process that an organization goes through to identify a roster of individuals who will be able to assume a key position in the organization when the person currently in the position moves to a different one or leaves the organization.

Detailed Description

Succession planning is the process that organizations use to identify the best individuals within and (if they wish) outside of the organization who will be able to take on a key position whenever the person currently in that position moves to another one or leaves the organization. Not limited to executive or managerial positions, succession planning can be used to identify the most suitable persons for any position deemed critical to the organization's success. It can also be designed to identify people who have high potential generally or who are top performers in their sector.

A succession plan is associated with a position profile, not the person currently in the position. In the event that the person is promoted, transferred, fired, etc., the succession plan remains associated with the position profile.

Succession plans are not created or deleted.

If the incumbant moves to another position or leaves the organization, and you have the necessary permissions, you can create a requisition directly from a succession plan. Before you can create a requisition, you must typically request your manager to approve the succession plan before you can create a requisition and populate it with the potential successors in the successor plan.

Benefits

- A key position can be filled quickly from a roster of highly qualified candidates.

- A succession plan enables managers and HR administrators to be proactive when planning their organization. Organizations can put in place training and other measures that will provide the potential successors with the knowledge and experience they'll need to be successful in their new role.

- Having a roster of potential successors who are capable, in advance, of stepping into a critical position eliminates or sharply reduces leadership or critical knowledge loss associated with the departure of the person currently in the position.

- Organizations can choose to add people who are currently employed outside the organization to succession plan rosters.

- Succession planning can be useful for team modeling purposes.

- All the direct reports of the person currently in the position can be added to the succession plan in one step.

- One person in a succession plan can be designated the temporary replacement pending the selection of the permanent replacement.

- Succession plans can be routed for approval; the approval path is typically specific to the person responsible for the plan.

Impacts

- Implementation
    - Some clients might have existing spreadsheet-based succession plans that they would like to import.
    - Some clients might want direct reports to be added automatically to succession plans.
    - Careful attention must be paid to manager relationships.

- Reporting
    - Reports and analytic reports include the following succession planning information.
    - Critical positions at risk due to inadequate succession plans or risk of loss of the current holder of the position.

    - Succession information by job role, an analysis of positions and their respective succession plans including successors' readiness and whether they are considered to have high potential.

    - Succession information by job role, an analysis of positions and their respective succession plans including successors' readiness and whether they are considered to have high potential.

- Integration
    - Succession Planning assumes a 1:1 ratio of employees to positions. This 1:1 ratio might cause conflicts for positions migrated from ERP systems whose position management allows multiple employees in a single position.

Search

The Succession Plan feature of Taleo Performance offers a number of search tools you can use to perform searches for potential successors for a position.

Detailed Description

Taleo Performance offers the following search tools to search for employees in your organization who you might want to include as potentional successors in a succession plan: Advanced Search, Top People, Above Average Fit, Fit, and a basic search by employee name.

The employee profile, initially created from a candidate's resume and then updated as the employee is assessed and rated, provides the basis for searching for potential successors.

Advanced Search

Advanced Search combines both search criteria and weighting to determine which employees are retrieved in a search as well as each person's rank in the Search Results table (the latter expressed as "Fit percentage") after the search is performed. Because you select the search criteria and their respective weight, the employees retrieved are typically good candidates for inclusion in a succession

plan. See Advanced Search - Criteria and Fit Percentage for a full explanation of how search criteria and weighting work.

Top People

A Top People search dynamically generates the criteria used to match employees who would make good succession candidates with a specific position profile. More precisely, a Top People search identifies employees whose talent profile, assessments and ratings satisfy the following criteria.

- 75% or higher match regarding competencies
- "Potential" rating is "High"
- Employee location is the same as the position profile location (employees who did not specify preferred locations will also be included)

Note that if a position profile contains no competencies, employees whose talent profiles, assessment and ratings satisfy the other criteria will be included in the search results and be given a "Fit percentage" of 100%.

Above Average Fit

An Above Average Fit search dynamically generates the criteria used to match employees who would make good succession candidates with a specific position profile. More precisely, an Above Average Fit search identifies employees whose talent profile, assessments and ratings satisfy the following criteria.

- 75% or higher match regarding competencies
- "Potential" rating is "Medium" (employees whose "Potential" rating is "High" will not be included in the search results)

Note that if a position profile contains no competencies, all employees whose talent profiles, assessment and ratings satisfy the other criterion will be included in the search results and be given a "Fit percentage" of 100%.

Fit

A Fit search dynamically generates the criteria used to match employees who would make good succession candidates with a specific position profile. More precisely, a Fit search identifies employees whose talent profile, assessments and ratings satisfy the following criterion:

- 50% or higher match regarding competencies

Note that if a position profile contains no competencies, all employees will be included in the search results and be given a "Fit percentage" of 100%.

Search for:

The Search for: field in the **Person Search** section is usually the best search tool to use if you know the name of someone in the organization you want to add to a succession plan.

Benefits

- A variety of search tools enables you to select the tool best suited to the situation.

- If you know the name of an employee who you want to add to a succession plan, you can search by first or last name or a combination of both names.

Advanced Search - Criteria and Fit Percentage

Combining search criteria and weighting, the advanced search feature in Succession Planning identifies employees you are likely to feel would make good successors for a succession plan.

Detailed Description

The search criteria and weighting determine which employees are retrieved in a search as well as each person's rank in the Search Results table (the latter expressed as "Fit percentage") after the search is performed. Because you select the search criteria and their respective weight, the employees retrieved are typically good candidates for inclusion in a succession plan.

The Advanced Search window contains a series of criteria that can be configured in three ways: the criteria is not used at all ("Not Specified"); the criteria is mandatory (the value is one other than "Not Specified" and all 5 stars are highlighted). This has NO impact on the fit % - only on the eligible employees

- You can choose not to use a criterion at all (value is "Not Specified").
- You can choose to make a criterion mandatory (value is any value but "Not Specified" and all five stars are highlighted).Employees must satisfy this criterion to be included in the search results. This configuration has **no** effect on the Fit percentage (i.e. ranking) however.
- The criterion is optional and thus is part of the Fit percentage calculation (value is any value other than "Not Specified" and less than five stars are selected).

There are five weighting increments.

- no stars = 1/5 weight

- 1 star = 2/5 weight

- 2 stars = 3/5 weight

- 3 stars = 4/5 weight

- 4 stars = 5/5 weight

- 5 stars = indicates the criterion is mandatory but is not weighted

Suppose you are going to perform an advanced search using the following criteria.

- Interest in International assignment (yes/no)

- Willing to travel (yes/no)

- Willing to relocate (yes/no)

Suppose three employees provided the following answers.

- John: yes, yes, yes

- Peter: yes, yes, no

- Paul: yes, no, yes

Example 1: An advanced search that uses only one criterion "International Assignment", value "Yes" with five stars highlighted. There is no Fit percentage per se because there are no weighed criteria, only one mandatory criterion. In this case all the employees would be included in the search results.

- John: 100%

- Peter: 100%

- Paul: 100%

Example 2: An advanced search that includes all three criteria with the following settings.

- Interest in International assignment: 5 stars (therefore not weighted, nor used in calculating Fit percentage)

- Willing to travel: 4 stars (5/5 because 4 stars = 5/5 weight as stated earlier)

- Willing to relocate: 4 stars (5/5 because 4 stars = 5/5 weight as stated earlier)

The Fit percentage for John, Peter and Paul would be:

- John: 100% (10/10)

- Peter: 50% (5/10)

- Paul: 50% (5/10)

Example 3:

- Interest in International assignment: 5 stars (therefore not weighted, nor used in calculating Fit percentage)

- Willing to travel: 3 stars (4/5 because 3 stars = 4/5 weight as stated earlier)

- Willing to relocate: 1 star (2/5 because 1 star = 2/5 weight as stated earlier)

The Fit percentage for John, Peter and Paul would be:

- John: 100% (6/6)

- Peter: 67% (4/6)

- Paul: 33% (2/6)

Example 4: An advanced search where no criteria are mandatory (five stars) and all three criteria are weighted.

- Interest in International assignment: 4 stars (5/5 because 4 stars = 5/5 weight as stated earlier)

- Willing to travel: 3 stars (4/5 because 3 stars = 4/5 weight as stated earlier)

- Willing to relocate: 1 star (2/5 because 1 star = 2/5 weight as stated earlier)

The Fit percentage for John, Peter and Paul would be:

- John: 100% (11/11)

- Peter: 82% (9/11)

- Paul: 64% (7/11)

If you use more than one criterion in an advanced search, the "AND" operator is invoked: only employees who satisfy all of the criteria you specify will be retrieved. Note that though multiple search criteria might produce a results list composed of particularly strong potential successors, in other cases, multiple criteria can prove too limiting and result in few or no employees retrieved.

Benefits

- A search strategy that makes judicious use of criteria and weighting can produce a list of employees who would make good successors for a succession plan.

- Unlike a search for successors by name, an advanced search enables you to identify successors you do not necessarily know.

Timeline Mode

Succession Planning provides a Gantt timeline for indicating the readiness of successors to move to a position should the incumbant move to a different position, be fired or leave the organization.

Detailed Description

Succession Planning provides two modes: a succession roster of ranked and unranked candidates, and a Gantt timeline for indicating the readiness of potential successors to move to a position should the incumbant move to a different position, be fired or leave the organization.

The Gantt timeline enables you to create and modify at any time a visual representation of the readiness of all successors in a succession plan.

The default value assigned when an employee is added to a succession plan is "Ready Now". You indicate a individual's readiness by clicking and dragging the corresponding icon or its right border.

Benefits

- Knowing the readiness of potential successors in a succession plan, the organization can plan in advance mentoring, training and lateral mobility measures to ensure that potential successors have the necessary skills to take on the position well before the incumbant moves to a different position, is fired or leaves the organization.

- Because all successors in a succession plan are displayed on the same Gantt timeline, it is easy to determine each successor's readiness relative to the readiness of the other successors.

- By consulting the timeline, you can quickly ascertain which successor is currently the best choice to select as a potential interim replacement.

Viewing a Succession Plan

You can view and manage the succession plan for any of your direct reports and indirect reports but not your own succession plan. If you have HR Administrator permissions, you can also view and manage the succession plan of all the employees in your organization (including your own).

Prerequisite

You must have direct reports to be able to view their succession plans. The exception is if you have HR Administrator permissions, which enable you to view and manage the succession plan of all employees in your organization.

1. On your Home page, click the **Succession Plan** link in the Manager Center panel. The succession plan of one of your direct reports is displayed. The person's name is displayed near the top of the page.

2. If you want to view the succession plan of a different direct report, click the drop-down arrow next to the name that is currently displayed near the top of the page. From the list that appears, click the name of a different direct report. Alternatively, if you want to view the succession plan of an indirect report, click **Other...** and then in the "Select an employee" window that appears, enter the name of the indirect report in the Search field, click **Search**, click the name of the person the search engine retrieves and then click **Select**.

Result

The succession plan of the direct report or indirect report you selected is displayed. You can perform a variety of operations to manage this person's succession plan.

Related Links

*   Succession Plan

Searching for a Successor - Search for:

The Succession Plan feature of Taleo Performance offers a number of search tools you can use to identify potential successors for a position. The employee profile, initially created from a candidate's resume and then updated as the employee is assessed and rated, provides the basis for searching for successors. Follow the steps in this section if you know the name of someone in the organization you want to add to a succession plan.

Prerequisite

1. On your Home page, click the **Succession Plan** link in the Manager Center panel. The succession plan of one of your direct reports is displayed. The person's name is displayed near the top of the page.

2. If you want to search for successors for that position, proceed directly to the next step. If you want to search for successors for the position of a different direct report or indirect report, click the drop-down arrow next to the name that is currently displayed near the top of the page. From the

      list that appears, click the name of a different direct report or click **Other** to search for an indirect report.

3. If the Tools panel is not displayed on the right side of the page, click ![icon]. The Tools panel, composed of the **People Search**, **Feedback** and **Dynamic Network** sections, is displayed.

4. In the Tools panel, **People Search** section, Search for: field, enter the name of the person you want to find. You can enter the first and last names in any order. You can enter the first name or the last name alone. You can enter the beginning of either the first name or the last name alone. You cannot, however, enter the beginning of both names, nor can you enter the beginning of the first or last name and the other name in full. For example, if you wanted to search for Barbara Williams, the following search strings would all be valid: barbara williams, barbara, williams, barb, wil, williams barbara. The following search strings would be invalid: barb williams, barbara wil, bar wil.

5. Click **Search**. The system displays the Search Results list that lists all employees in the organization whose name corresponds to your search criteria. Each entry in the list contains the name of the person, employee type, the person's job title and location. **Dan, Kate: any restriction on whom the search can retrieve?**

6. Optional step. To view a person's talent profile, employee goals, performance review, position profile, or succession plan, locate the person's name in the Person's Name column and then click the pertinent item in the Go to: list that appears. Click the black arrow (to the left of the "Home" icon ![icon] to return to the results list.

Result

At the end of step 5, the Search Results list lists all employees in the organization whose name corresponds to your search criteria. Each entry in the list contains the name of the person, employee type, the person's job title and location.

After Completing This Task

Before adding candidates in a search results list to a succession plan, you can compare the competencies of up to four candidates at a time to determine which individuals in the group would be the best successors.

You can add a successor to a succession plan.

Related Links

- Search
- Comparing Successors
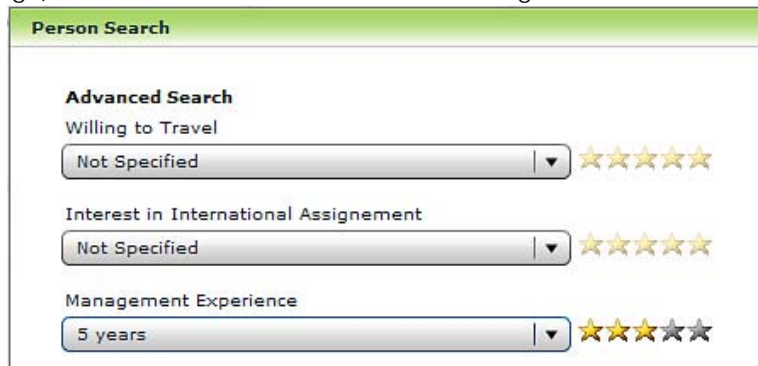- Adding a Successor from a Search Results List

Searching for a Successor - Advanced Search

The Succession Plan feature of Taleo Performance offers a number of search tools you can use to identify potential successors for a position. The employee profile, initially created from a candidate's resume and then updated as the employee is assessed and rated, provides the basis for searching

for successors. Follow the steps in this section if you want to specify criteria (other than a person's name) in your search.

Prerequisite

1. On your Home page, click the **Succession Plan** link in the Manager Center panel. The succession plan of one of your direct reports is displayed. The person's name is displayed near the top of the page.

2. If you want to search for successors for that position, proceed directly to the next step. If you want to search for successors for the position of a different direct report or an indirect report, click the drop-down arrow next to the name that is currently displayed near the top of the page. From the list that appears, click the name of a different direct report or click **Other** to search for an indirect report.

3. If the Tools panel is not displayed on the right side of the page, click [icon]. The Tools panel, composed of the **People Search**, **Feedback** and **Dynamic Network** sections, is displayed.

4. In the Tools panel, **People Search** section, click **Advanced Search**.

5. The window that opens contains a series of search criteria ("Willing to Travel", "Years in Industry", etc.). To include a criterion in the search, click it and then select a value for the criterion from the list that appears by clicking the value. For example, to specify five years of management experience in your search, you would click **Management Experience** and then you would click **5 years** in the list that appears. The five stars at the right of the criterion are highlighted indicating an exact match is required. In the case of the example, employees who have less than five years of management experience will not be included in the search results. To assign a particular weight to a criterion, you can highlight one, two, three or four stars (see the following image). This action indicates to the search engine that the exact value is not a

requirement but is to be used in ranking the employees retrieved in the search results ("Fit percentage"). Employees who have less than five years of management experience will not be excluded from the search results but their "Fit percentage" (and hence, their rank) will be lower than it would be if they had five years of management experience. See Advanced Search - Criteria and Fit Percentage. Additional criteria, if you add any, invoke the "AND" operator: only employees who satisfy all of the criteria you specify will be retrieved. Note that though multiple search criteria might produce a results list composed of strong potential successors, they can also prove too limiting and result in few or no employees retrieved.

6. Click **Search** at the bottom of the list. The system displays the Search Results list that lists employees in the organization who match to varying degrees your search criteria. Employees are displayed in order from best match to least best match. Each entry in the list contains the name

of the person, employee type, the person's job title and location and "fit" percentage. **Dan, Kate: Any restriction on whom the search can retrieve? Do you have a handy definition of "fit"?**

7. Optional step. Sometimes viewing a person's talent profile, employee goals, performance review, position profile, or succession plan can assist you in determining whether you should add an employee to the succession list. Locate the person's name in the Person's Name column, click the corresponding drop-down arrow in the same column and then click the pertinent item in the Go to: list that appears. Afterward, click the black arrow (to the left of the "Home" icon

    ◄ ▾ 🏠 to return to the results list.

Result

At the end of step 6, the Search Results list lists employees you might want to add to the succession plan. Each entry in the list contains the name of the person, employee type, the person's job title and location.

After Completing This Task

Before adding candidates in a search results list to a succession plan, you can compare the competencies of up to four candidates. This can be useful for determining which individuals you want to add to a succession plan.

You can add a successor to a succession plan.

Related Links

*   Search
*   Advanced Search - Criteria and Fit Percentage
*   Comparing Successors
*   Adding a Successor from a Search Results List

Searching for a Successor - Top People

The Succession Plan feature of Taleo Performance offers a number of search tools you can use to identify potential successors for a position. The employee profile, initially created from a candidate's resume and then updated as the employee is assessed and rated, provides the basis for searching for successors. You can quickly identify "top people" and add them to a succession plan.

Prerequisite

1. On your home page, click the **Succession Plan** link in the Manager Center panel. The succession plan of one of your direct reports is displayed. The person's name is displayed near the top of the page.

2. If you want to search for successors for that position, proceed directly to the next step. If you want to search for successors for the position of a different direct report, click the black triangle next to the name that is currently displayed near the top of the page. From the list that appears, click the name of a different direct report.

3. If the Tools panel is not displayed on the right side of the page, click [icon]. The Tools panel, composed of the **People Search**, **Feedback** and **Dynamic Network** sections, is displayed.

4. In the Tools panel, **People Search** section, click **Top People**.

Result

The search engine quickly identifies the top people by comparing **(Dan, Kate, probably incorrect:)** the position profile with each employees' talent profile, goals and performance review.

After Completing This Task

Before adding candidates in a search results list to a succession plan, you can compare the competencies of up to four candidates at a time. This can be useful for determining which individuals you want to add to a succession plan.

You can add a successor to a succession plan.

Related Links

*   Search
*   Comparing Successors
*   Adding a Successor from a Search Results List

Searching for a Successor - Above Average Fit

The Succession Plan feature of Taleo Performance offers a number of search tools you can use to identify potential successors for a position. The employee profile, initially created from a candidate's resume and then updated as the employee is assessed and rated, provides the basis for searching for successors. You can quickly identify employees who represent an "above average fit" (whose "Fit" percentage is higher than average) and add them to a succession plan. **Dan, Kate: The previous explanation might be incorrect; can you provide a correct explanation, please?**

Prerequisite

1. On your home page, click the **Succession Plan** link in the Manager Center panel. The succession plan of one of your direct reports is displayed. The person's name is displayed near the top of the page.

2. If you want to search for successors for that position, proceed directly to the next step. If you want to search for successors for the position of a different direct report, click the black triangle next to the name that is currently displayed near the top of the page. From the list that appears, click the name of a different direct report.

3. If the Tools panel is not displayed on the right side of the page, click [icon]. The Tools panel, composed of the **People Search**, **Feedback** and **Dynamic Network** sections, is displayed.

4. In the Tools panel, **People Search** section, click **Above Average Fit**.

Result

The search engine quickly identifies employees who respresent an above average fit (whose "Fit" percentage is higher than average) by comparing **(Dan, probably incorrect:)** the position profile with each employees' talent profile, goals and performance review.

After Completing This Task

Before adding candidates in a search results list to a succession plan, you can compare the competencies of up to four candidates at a time. This can be useful for determining which individuals you want to add to a succession plan.

You can add a successor to a succession plan.

Related Links

- Search
- Comparing Successors
- Adding a Successor from a Search Results List

Searching for a Successor - Fit

The Succession Plan feature of Taleo Performance offers a number of search tools you can use to identify potential successors for a position. The employee profile, initially created from a candidate's resume and then updated as the employee is assessed and rated, provides the basis for searching for successors. You can quickly identify employees whose "Fit" percentage is highest based on a comparison between the position profile (with which the succession plan is associated) and each employees' talent profile, goals and performance review. **Dan, Kate: The previous explanation might be incorrect; can you provide a correct explanation, please?**

Prerequisite

1. On your home page, click the **Succession Plan** link in the Manager Center panel. The succession plan of one of your direct reports is displayed. The person's name is displayed near the top of the page.

2. If you want to search for successors for that position, proceed directly to the next step. If you want to search for successors for the position of a different direct report, click the black triangle next to the name that is currently displayed near the top of the page. From the list that appears, click the name of a different direct report.

3. If the Tools panel is not displayed on the right side of the page, click . The Tools panel, composed of the **People Search**, **Feedback** and **Dynamic Network** sections, is displayed.

4. In the Tools panel, **People Search** section, click **Fit**.

Result

The search engine quickly identifies employees **(Dan, Kate, probably incorrect:)** whose "Fit" percentage is highest based on a comparison between the position profile (with which the succession plan is associated) and each employees' talent profile, goals and performance review.

After Completing This Task

Before adding candidates in a search results list to a succession plan, you can compare the competencies of up to four candidates at a time. This can be useful for determining which individuals you want to add to a succession plan.

You can add a successor to a succession plan.

Related Links

- Search
- Comparing Successors
- Adding a Successor from a Search Results List

Adding a Successor from a Search Results List

Having performed a search for potential successors, you might want to add some of them to a succession plan.

Prerequisite

You have just performed a search for potential successors (and have perhaps compared some the employees displayed in the Search Results list) and now want to add one of the employees retrieved to a succession plan.

1. While the Search Results list is displayed, locate an employee you want to add to the succession plan in the list, click the corresponding drop-down arrow in the rightmost column and then click **Add to current plan**.

2. You can repeat the previous step to add other employees to the succession plan.

3. Click ⊞. When the system displays the following message, "Your changes have been saved", click **OK**.

4. If you forget to click ⊞ in the previous step and click the black arrow next to "Home" ◄▾⌂ instead, the sytem displays the following question, "Do you want to save the changes you made?" Click **Yes**.

Result

The employees you selected are now displayed in the unranked successors section of the succession plan.

After Completing This Task

You can move unranked successors to the ranked successors section.

Whether a successor is in the ranked successors section or unranked successors section, you can also modify the individual's position relative to the others.

Related Links

- Ranking and Unranking a Successor

Adding a Direct Report

You can quickly add all of an employee's direct reports to the employee's succession plan.

Prerequisite

1. On your Home page, click the **Succession Plan** link in the Manager Center panel. The succession plan of one of your direct reports is displayed. The person's name is displayed near the top of the page.

2. If you want to search for successors for that position, proceed directly to the next step. If you want to search for successors for the position of a different direct report or indirect report, click the drop-down arrow next to the name that is currently displayed near the top of the page. From the list that appears, click the name of a different direct report or click **Other** to search for an indirect report.

3. Click **Actions** (or the corresponding drop-down arrow) and then click **Add Direct Reports**.

Result

The employee's direct reports are all displayed in the Unranked Successors section. You can rank them if you want.

After Completing This Task

Before adding candidates in a search results list to a succession plan, you can compare the competencies of up to four candidates at a time. This can be useful for determining which individuals you want to add to a succession plan.

You can add a successor to a succession plan.

Related Links

- Comparing Successors
- Adding a Successor from a Search Results List

Ranking and Unranking a Successor

When you have a number of successors in a succession plan, you typically want to rank the employees who are best suited to the position and you might have other employees you want to

include in a succession plan but do not want to rank for the moment. You can also change an employee's ranking relative to other ranked employees and an unranked employee's position relative to other unranked employees. As well, you can rank an unranked potential successor or vice versa.

Prerequisite

The following steps assume that successors are currently in the succession plan.

1. On your Home page, click the **Succession Plan** link in the Manager Center panel. The succession plan of one of your direct reports is displayed. The person's name is displayed near the top of the page.

2. If you want to view the succession plan of a different direct report, click the drop-down arrow next to the name that is currently displayed near the top of the page. From the list that appears, click the name of a different direct report. Alternatively, if you want to view the succession plan of an indirect report, click **Other...** and then in the "Select an employee" window that appears, enter the name of indirect report in the Search field, click **Search**, click the name of the person the search engine retrieves and then click **Select**.

3. While the succession plan is displayed you can perform any of the following tasks.

    In the ranked successors section or unranked successors section, Readiness column, you can click the drop-down arrow that corresponds to a successor you want to rank or whose rank you want to change and then click **Set to Rank x** (the value of "x" will vary). The successor is displayed in the ranked successors section in the correct position.

    - In the ranked successors section, Readiness column, you can click the drop-down arrow that corresponds to a ranked successor you want to move to the unranked successors section and then click **Unrank**.
    - To remove a successor from either section altogether, in the Readiness column, click the corresponding .
    - You can preform some of the tasks explained previously simply by clicking and dragging successors from section to another and within the same section.
    - Sometimes viewing a person's talent profile, employee goals, performance review, position profile, or succession plan can assist you in ranking the individual. Locate the person's name in the Successor's Name column, click the corresponding drop-down arrow in the same column and then click the pertinent item in the Go to: list that appears. Afterward, click the black arrow (to the left of the "Home" icon to return to the ranking list.

4. After making your changes, click **Save**.

5. If you continue to make ranking changes, always click **Save** afterward to save your changes.

Result

The employees you selected are now displayed in the unranked successors section of the succession plan.

After Completing This Task

When you are satified with a succession plan, you can request your manager to approve the plan.

Related Links

- Requesting Approval of a Succession Plan

Comparing Successors

When you perform a search for potential successors and view the results list, it is often useful to compare the employees retrieved before adding them to a succession plan. Perform the steps in this section when you want to compare employees in a search results list.

Prerequisite

You have just performed a search for potential successors and want to compare some of employees in the search results list to determine which of them you should add to a succession plan.

1. To compare employees in a results list, press and hold the CTRL key on your keyboard and click the name of up to four people you want to compare.

2. Click .

Result

Information about all the candidates you selected is displayed in a manner that facilitates comparisons.

After Completing This Task

When you have identified candidates who you feel would make good successors, you can add them to a succession plan.

Related Links

• Adding a Successor from a Search Results List

Managing a Successor's Readiness

Succession Planning provides a Gantt timeline for indicating the readiness of successors to move to a position should the incumbant move to a different position, be fired or leave the organization. Follow the steps in this section to modify the readiness of successors in a succession plan.

Prerequisite

1. On your Home page, click the **Succession Plan** link in the Manager Center panel. The succession plan of one of your direct reports is displayed. The person's name is displayed near the top of the page.

2. If you want to search for successors for that position, proceed directly to the next step. If you want to search for successors for the position of a different direct report or indirect report, click the drop-down arrow next to the name that is currently displayed near the top of the page. From the list that appears, click the name of a different direct report or click **Other** to search for an indirect report.

3. Switch from the succession roster view to the timeline mode by clicking .

The default value assigned when an employee is added to a succession plan is "Ready Now". You indicate a individual's readiness in two ways. You can click the icon that corresponds to the successor whose readiness you want to change and and drag it along the timeline. To indicate the time period required before the successor will be truly ready, you can also click the icon, move your mouse pointer over it, and when the pointer changes into a double-headed area, click and drag the border. The sytem will display the time period as you drag the icon border.

4. You can use the bar at the bottom of the page to move ahead or move back in time.

5. When you are satisfied with the readiness values you have selected for all of the successors, click [icon] to save your changes.

6. To return to the successor roster, click [icon].

Result

The readiness value of each successor corresponds to your evaluation of his/her readiness to move to the position.

Selecting a Potential Interim Replacement

A single candidate can be identified as a potential interim replacement in a succession plan.This is an individual who could serve as a temporary replacement in the event that the incumbent leaves the position.

Prerequisite

1. On your Home page, click the **Succession Plan** link in the Manager Center panel. The succession plan of one of your direct reports is displayed. The person's name is displayed near the top of the page.

2. If you want to view the succession plan of a different direct report, click the drop-down arrow next to the name that is currently displayed near the top of the page. From the list that appears, click the name of a different direct report. Alternatively, if you want to view the succession plan of an indirect report, click **Other...** and then in the "Select an employee" window that appears, enter the name of indirect report in the Search field, click **Search**, click the name of the person the search engine retrieves and then click **Select**.

3. Locate the name of the person you want to select as a potential temporary replacement in the ranked or unranked successors list and, in the Readiness column, click the corresponding drop-down arrow and click **Select as Interim Replacement**. (If you later want to remove this designation, click the drop-down arrow and then click **Remove as Interim Replacement**.)

Result

In the Interim Replacement column, "Yes" is displayed.

Requesting Approval of a Succession Plan

When you are satisfied with a succession plan and would like to have it approved, follow the steps provided in this section. Once a succession plan has been approved or rejected, you can modify it afterward and request approval of the revised succession plan.

Prerequisite

Dan, Kate: Are there any prerequisites as such?

1. On your Home page, click the **Succession Plan** link in the Manager Center panel. The succession plan of one of your direct reports is displayed. The person's name is displayed near the top of the page.

2. If you want to view the succession plan of a different direct report, click the drop-down arrow next to the name that is currently displayed near the top of the page. From the list that appears, click the name of a different direct report. Alternatively, if you want to view the succession plan of an indirect report, click **Other...** and then in the "Select an employee" window that appears, enter the name of the indirect report in the Search field, click **Search**, click the name of the person the search engine retrieves and then click **Select**.

3. Click **Actions** (or the corresponding drop-down arrow) and then click **Request Approval**.

4. A message appears indicating the name of the approver. Click **Save**. Next to **Actions**, "Not Approved" is replaced by "In Progress" indicating that the approval request has been sent and that approval is pending. You cannot, while the approval is pending, edit and save the succession plan; only when the request is approved or rejected can you edit the succession plan and send a request for approval of the revised version.

Result

In the approver's My Tasks panel, the **Approve Succession Plan** task is displayed.

After Completing This Task

If the approver approves the succession plan (next to **Actions**, "In Progress" is replaced by "Approved"), you want to create a requisition and have the required permissions, you can create a requistion directly from the succession plan and source the requisition automatically with the potential successors in the successor plan.

If the approver rejects the succession plan (next to **Actions**, "In Progress" is replaced by "Rejected"), you can edit it and send a new approval request to the approver.

Whether your request is approved or rejected, you receive an email message informing you of your manager's decision.

Related Links

*   Approving a Succession Plan
*   Creating a Requisition

Approving a Succession Plan

If you receive a succession plan approval request, you have the option of accepting or rejecting the succession plan. In either case, the manger who sent to approval request might later edit the succession plan and send a new approval request.

Prerequisite

1. When you receive a succession plan approval request, the **Approve Succession Plan** task is displayed in the My Tasks panel. Click **Approval Succession Plan**. The request is displayed; if you have received more than one request, they are displayed in a list. Each request displays the name of the person currently in the position, the date on which the request was received and the date by which a reponse should be sent to the sender (manager).

2. Click the **Go to Succession Plan** that corresponds to the succession plan you want to evaluate.

3. Evaluate the succession plan and decide whether you want to approve it. You cannot edit the succession plan per se; you can only approve or reject it.

4. Click **Actions** (or the corresponding drop-down arrow) and then click **Decide on Approval**.

5. A message appears requesting you to approve or reject the succession plan. Click the radio button next to **Approve** to approve the plan or click the radio button next to **Reject** to reject the plan. You can enter comments in the Comments field if you want.

6. Click **OK**. Next to **Actions**, "In Progress" is replaced by "Approved" if you approved the plan or by "Rejected" if you rejected the plan. If you included a comment, it is displayed below **Actions**.

Result

When the manager who sent the request opens the succession plan, "In Progress" next to **Actions** is replaced by "Approved" if you approved the plan or by "Rejected" if you rejected the plan. An email message is sent to the manager informing him/her of your decision. If the manager has the required permissions, he/she can create a requistion directly from the succession plan.

Related Links

- Succession Plan

Creating a Requisition

Once you have received approval for a succession plan, if you need to create a requisition directly from the succession plan and you have the required permissions, you can do so. This action is typically necessary when the incumbant moves to another position, is fired or leaves the organization. When you create a requisition directly from a succession plan, the potential successors are sourced automatically.

Prerequisite

You can only create a requistion directly from a succession plan if you have the required permissions. Before you can initiate a requisition, the succession plan must be approved by your manager.

1. On your Home page, click the **Succession Plan** link in the Manager Center panel. The succession plan of one of your direct reports is displayed. The person's name is displayed near the top of the page.

2. If you want to view the succession plan of a different direct report, click the drop-down arrow next to the name that is currently displayed near the top of the page. From the list that appears, click the name of a different direct report. Alternatively, if you want to view the succession plan of an indirect report, click **Other...** and then in the "Select an employee" window that appears, enter the name of the indirect report in the Search field, click **Search**, click the name of the person the search engine retrieves and then click **Select**.

3. If your succession has been approved, "Approved" is displayed next to **Actions**. You can only create a requisition after the succession plan has been approved.

4. Click **Actions** (or the corresponding drop-down arrow) and then click **Create Requisition**. If no template has been associated with the job template, the system will display an error message. **Dan, Kate: Not sure what the user does now.**

Result

The requisition is created and the successors in the succession plan are automatically matched with the requisition.

Related Links

*   Approving a Succession Plan

Managing Succession Plans as an HR Administrator

If you have the required HR Administrator permissions, you can access the Succession Plan feature as if you were a particular manager in the organization and thereby gain access to the succession plans of his/her direct reports and indirect reports. How is this useful? You, as an HR administrator, might be aware of employees in the organization who would make good candidates for a succession plan, employees that the manager does not know about. By acting on the manager's behalf, you could add those employees to succession plans of the manger's direct and indirect reports.

Prerequisite

You have the required HR administrator permissions that enable you to view and manage the succession plan of all employees in your organization.

1. On your Home page, click the name in parantheses that is displayed at the top of the page.
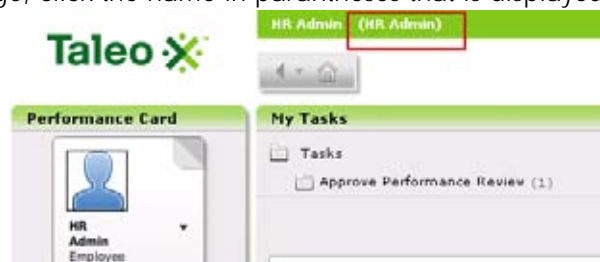
2. Enter the last name -- or better -- first and last name of the manager whose direct and/or indirect report succession plans you want to view or manage. Click **Search**.

3. Click the name of the manager that is displayed and then click **Select**. The name that was displayed in parantheses is replaced by the manager's name.

4. Click Succession on the Manager Center wheel. The system displays a succession plan résumé

   of each direct report.

5. To view and manage a specific succession plan, click the small drop-down arrow on the corresponding card and then click **Succession Plan**.

6. Optional step. If you want to view and manage one of the manager's indirect reports, click the name displayed at the right of (or the drop-down arrow next to the name) and then click **Other...** from the list that appears.

Result

The succession plan of the direct or indirect report is displayed and you can perform tasks that the manager can perform. Actions that you perform are recorded in the History section as performed by you (not by the manager).

Succession Planning Fields and Buttons

Fields and buttons displayed in the Succession Plan section of Taleo Performance are presented in the following table. Each entry in the table includes a field or button, a description, possible values (when they are predefined), the part of the application to which the field applies and the field's header.

Field	Description	Applicable to	Header
Above Average Fit	Automated search performed to identify candidates. An Above Average Fit search dynamically generates the criteria used to match employees who would make good succession candidates with a specific position profile. More precisely, an Above Average Fit search identifies employees whose talent profile, assessments and ratings satisfy the following criteria: 75% or higher match regarding competencies; "Potential" rating is "Medium" (employees whose "Potential" rating is "High" will not be included in the search results) See Searches.	List and timeline modes	

Field	Description	Applicable to	Header
Actions	A drop-down lists that contains the actions you can currently perform.	Various locations in succession plan	
Advanced Search	Click this link to access the search criteria and weighting values associated with advanced search. See Advanced Search - Criteria and Fit Percentage	List and timeline modes	
Compare the specified people	While pressing CTRL, you can click up to 4 candidates in a search results list or in a successor list to compare their performance.	Various locations in succession plan	
Competencies	Advanced search criterion that searches for matches between the competencies specified in the position profile and those found in the employee's talent profile and performance reviews.	Advanced Search	
Display the list mode	Click this icon to display the lists of ranked and unranked successors.	timeline mode	
Display the timeline mode	Click this icon to view and manage the readiness of successors.	list mode	
Fit	Automated search performed to identify candidates. 50% or higher match regarding competencies See Searches.	List and timeline modes	
Hide Tools	Click Hide Tools to close the People Search / Feedback / Dynamic Network panel.	list mode	
Home	Click this icon to return to your home page.	always displayed	
Interest in International Assignment	Advanced search criterion that queries a candidate's answer in a talent profile about whether he/she is willing to work abroad.	Advanced Search	
Interim Replacement	Column header. The person who is currently the most apt to move to the position on a temporary basis should the position become available now.	list mode	
Management Experience	Advanced search criterion. The number of years of management experience a candidate indicated in his/her talent profile.	Advanced Search	
Potential	Advanced search criterion. An employee's potential as specified by the manger in the employee's performance review.	Advanced Search	
Rank	Column header. A numeric value indicates the current rank of the successor relative to the others.	list mode	
Readiness	Column header. The value represents a successor's readiness to move to the position should it become available. The value is set in the timeline mode.	list mode	
Readiness for promotion	Advanced search criterion. The readiness of an employee to be promoted to a higher position. The value originates from the employee's performance reviews. This criterion should not be confused with readiness within the context of succession planning and the timeline mode.	Advanced Search	

Field	Description	Applicable to	Header
Risk of Loss	Advanced search criterion. The possibility that candidates will leave the organization. The value originates from employees' performance reviews.	Advanced Search	
Reassignment	Advanced search criterion. The readiness of an employee to be reassigned to a different position in the organization	Advanced Search	
Save the information	Whenever you make a change in a succession plan (e.g. add candidates following a search), you should click the Save the information icon to save your change.	Various locations in succession plan	
Search	Click Search after you have entered your search terms in the Search for: field.	List and timeline modes	
Search for:	Type a first name, last name, or first and last name and then click Search to perform a search by employee name.	list mode	
Successor Name	Column header. Each value represents the name of a successor	list mode	
Top People	A Top People search dynamically generates the criteria used to match employees who would make good succession candidates with a specific position profile. More precisely, a Top People search identifies employees whose talent profile, assessments and ratings satisfy the following criteria:75% or higher match regarding competencies; "Potential" rating is "High"; Employee location is the same as the position profile location (employees who did not specify preferred locations will also be included) See Searches.	List and timeline modes	
Willing to relocate	Advanced search criterion. The willingness of an employee to move to a different location.	Advanced Search	
Willing to Travel	Advanced search criterion that queries a candidate's answer in a talent profile about the percentage of time he/she is willing to travel in the performance of his/her duties.	Advanced Search	
Years in Industry	The number of years a candidate has worked in the same industry as the one specified in the position profile. The value originates from the talent profile.	Advanced Search	