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# Performance Management



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## Guide Usage and Disclosures

### Guide Information

This guide is designed based on the Oracle Cloud HCM delivered setups; some fields may differ from your instance configurations. For example, some fields may be required in this guide that are not required in your instance. Additionally, some of the training topics discussed in this guide may not apply to your organization, but we know you'll find it helpful. If you would like a custom guide for your organization, please contact our Training Team at [learn@campratech.com](mailto:learn@campratech.com).

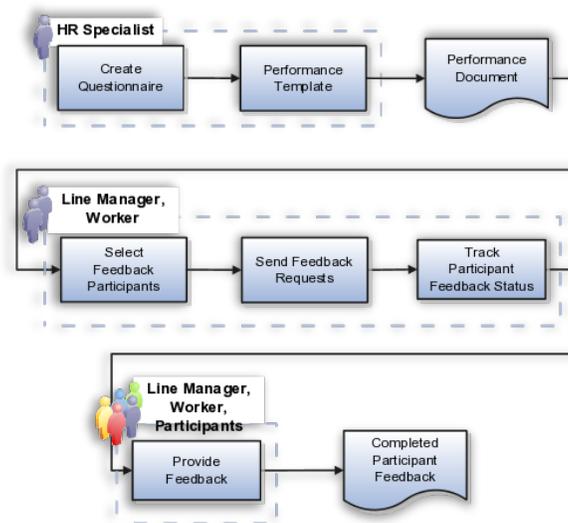
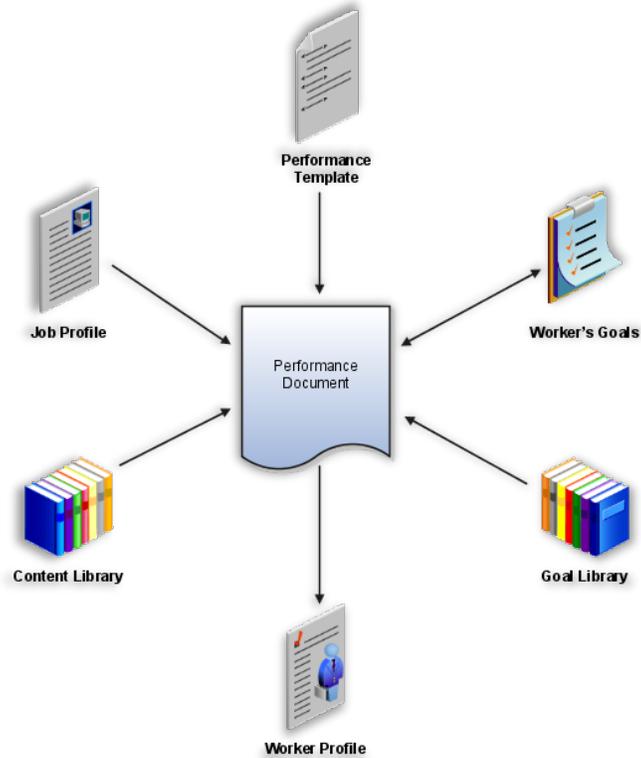
### How To Use This Guide

This guide is intended to assist Admin users with their day-to-day tasks in Oracle Cloud. A few notes before you begin:

- ✦ Any fields with an asterisk are required fields.
- ✦ Based on your configurations, approval workflows may in place for the training topics below; those tasks would need to be approved before the additions or updates are visible in your instance.
- ✦ You may have specific flexfields in your instance that require inputs; this guide is a generic tool and will not include those specific flexfields. You will see those fields as a context segment or not visible at all in our Oracle instance.

## Overall Process Flow

Before we begin with the training content, It's important to understand the overall process flow of information in Oracle Cloud for the Performance Management module.



## Glossary of Terms

Here we've included common terms associated to the Performance Management module. Please review the terms below to familiarize yourself with the Oracle Cloud terms used throughout this guide.

### Performance Document

- ❖ A document that contains information and allows a supervisor to perform an employee-related evaluation for a chosen time period

### Notification

- ❖ A notice sent to an employee of an organization containing information for action or as an FYI

### Goal Plans

- ❖ A visual representation of the steps needed to accomplish an identified goal; a plan to accomplish a goal

### Participant Feedback

- ❖ Comments regarding an employee's effort and performance from a manager or colleague

### Document Eligibility

- ❖ An employee will only be eligible for a performance document if they meet the eligibility criteria for the performance document or the eligibility profile.

### Review Periods

- ❖ A period of time in which an employee's performance is evaluated, usually over the course of 1 year, using a formal review process by their manager and/or colleagues

### Questionnaires

- ❖ Survey questions designed to enable managers and supervisors to give actionable feedback on specific aspects of employees' work, including areas for improvement, additional training needs, areas of exceptional performance, and expectations of future performance

### Performance Document Types

- ❖ Document types are used to determine which performance document provide interim rating later in performance documents or which goal plans that performance goals added to performance documents are added to

## Performance Roles

- ✦ We can create roles as required for the evaluation process for the organization. Most organizations have participant roles such as peer or mentor, or participant roles to facilitate a matrix management review. We can also have additional manager roles used in performance templates where the default manager type is not the line manager, for example, the default manager can be an HR Manager

## Eligibility Profiles

- ✦ Used to restrict availability of performance documents to a specific population based on criteria set forth by the organization

## Check-In

- ✦ A series of regular conversations between managers and employees about work, progress, and goals throughout the year

## Profile Rating Models

- ✦ Rating models are used to rate workers on their performance and level of proficiency in the skills and qualities that are set up on the person profile

## Talent Notifications

- ✦ We can configure the application to send notifications to different roles such as the HR specialist, manager, and employee for various performance management tasks

## Performance Templates

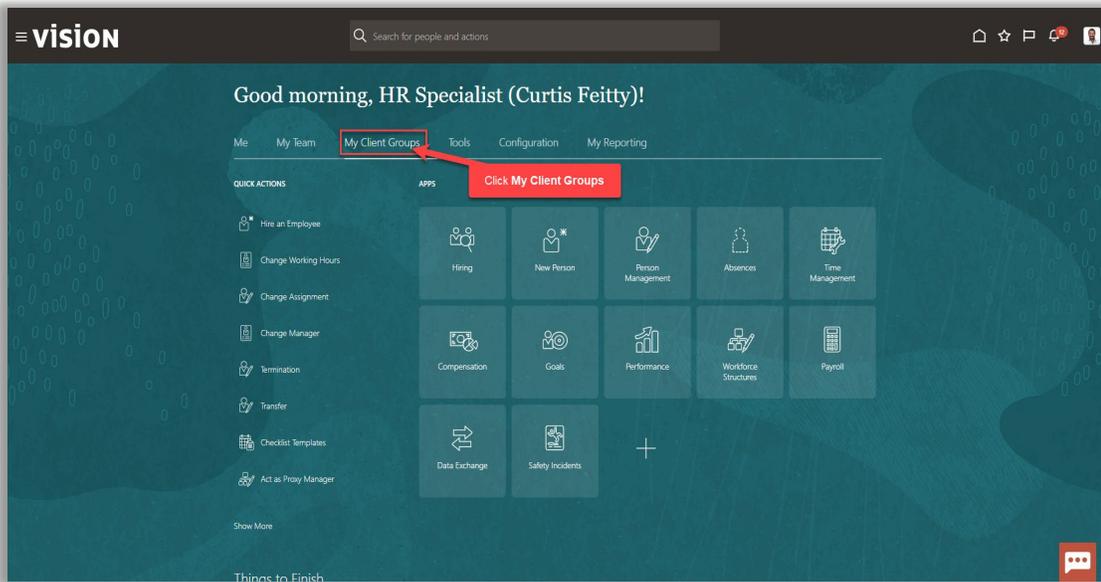
- ✦ We can configure the performance template to use interim evaluations; these include interim ratings and comments in the later performance document. The ratings, comments, or both (depending on configuration) from performance documents associated with those document types appear in the document

# Day to Day Operations Guide

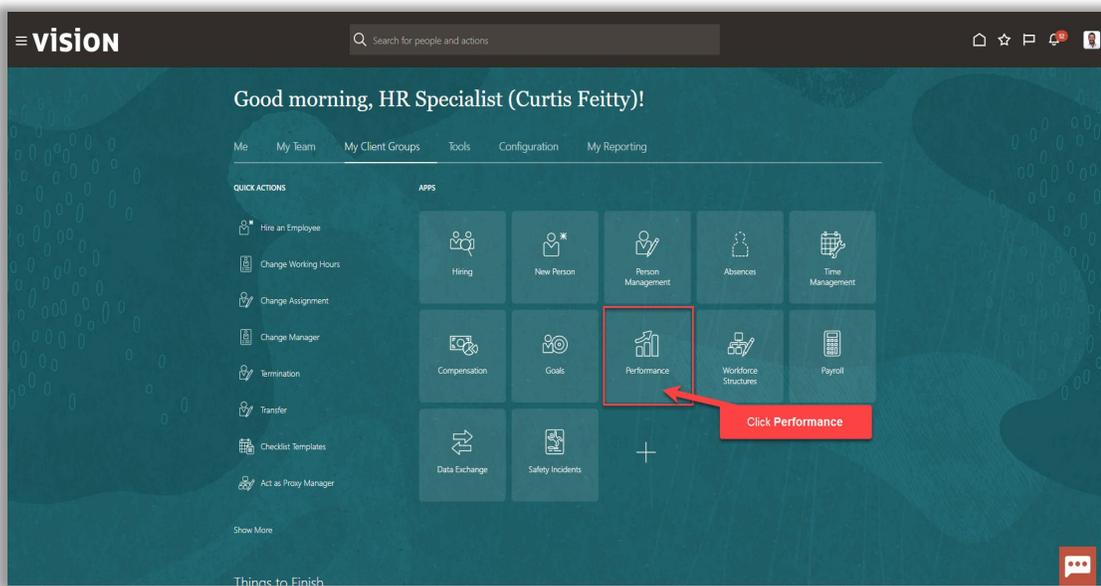
## Create Performance Documents

Navigation: Home>My Client Groups>Performance>Performance Document>Create Document>Search Employee>Continue>Enter Document Info>Submit>Eligibility Batch Process>Enter Basic Options>Submit>Monitor Process

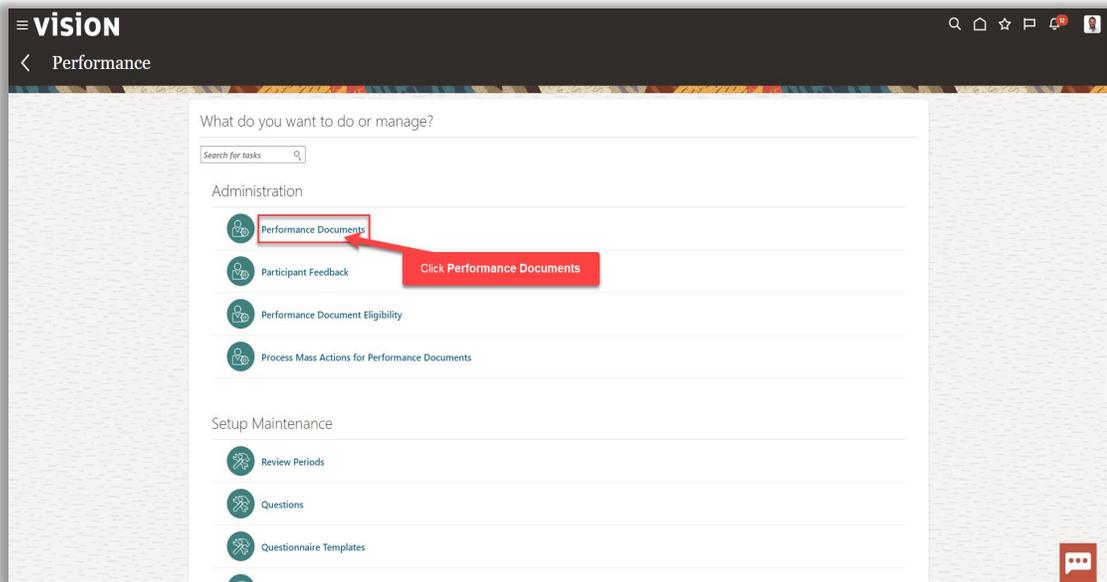
From the home screen, click **My Client Groups**



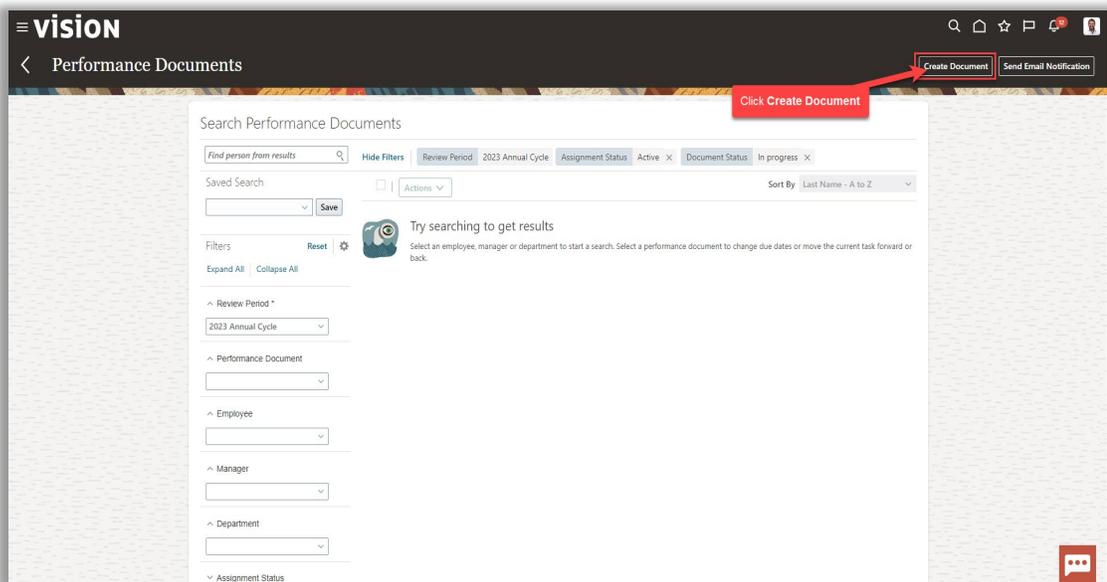
Next, click **Performance**



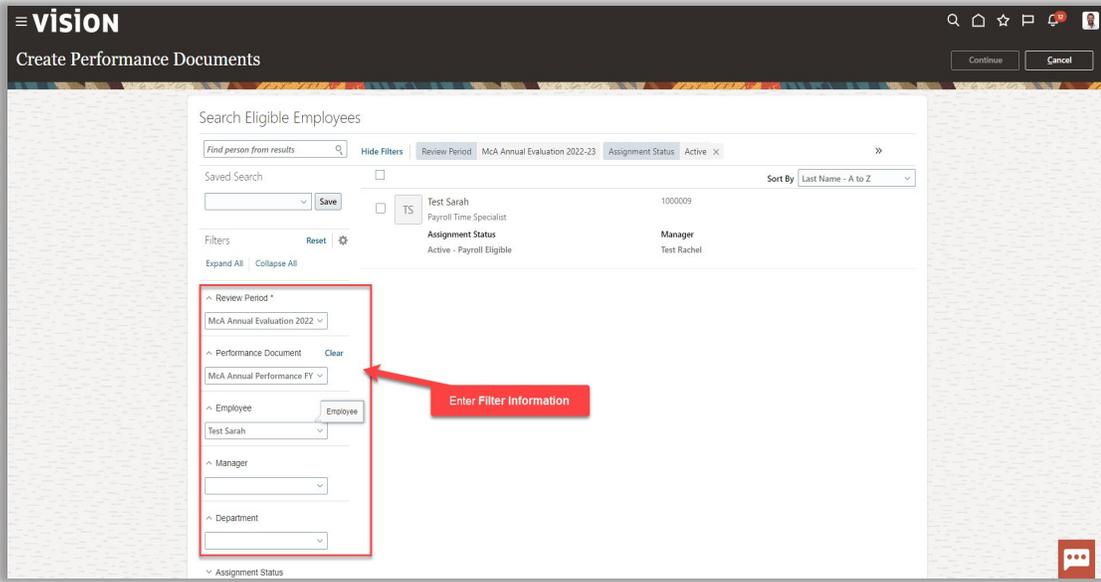
## Click Performance Document



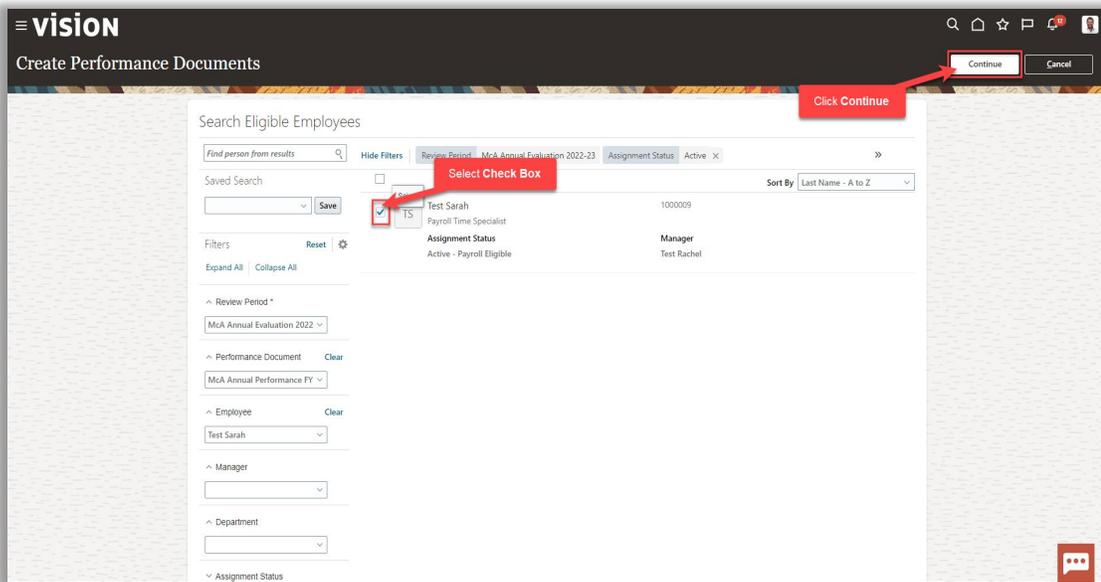
## Click Create Document



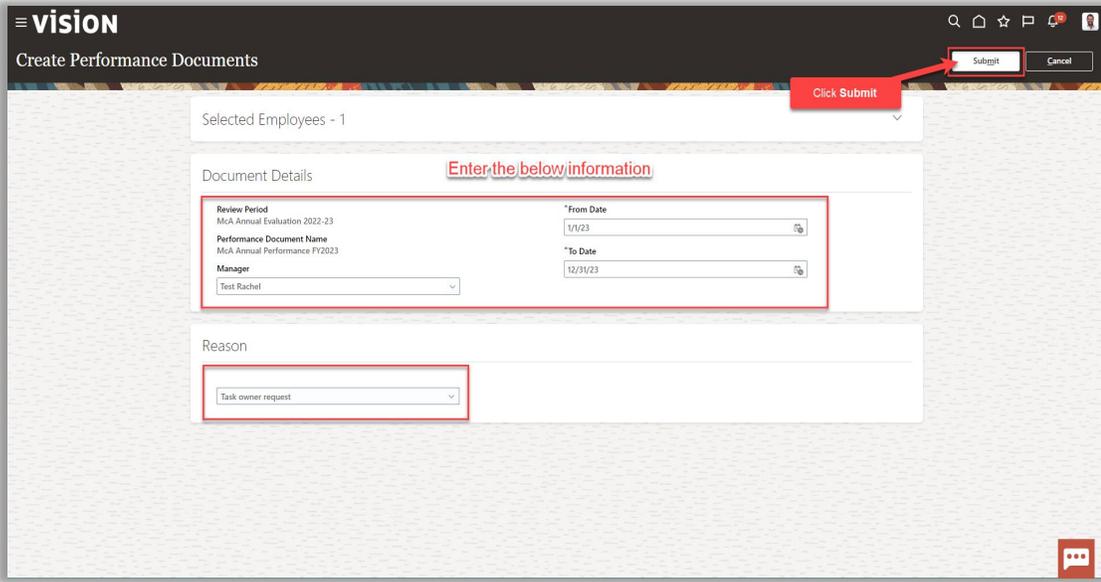
## Enter the Filter Information



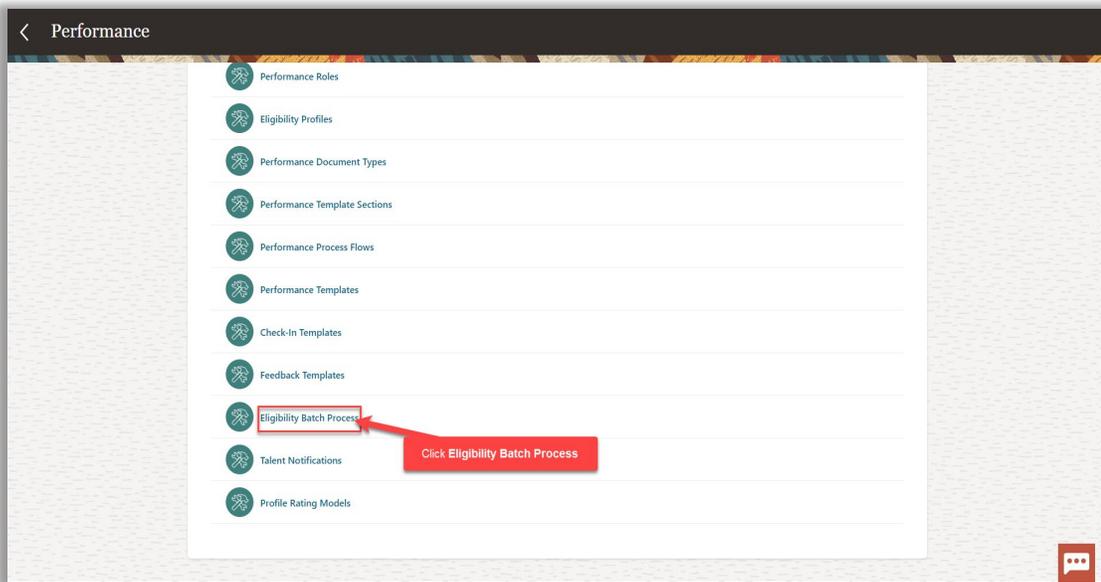
Select the employee by clicking the **Check box** and click **Continue**



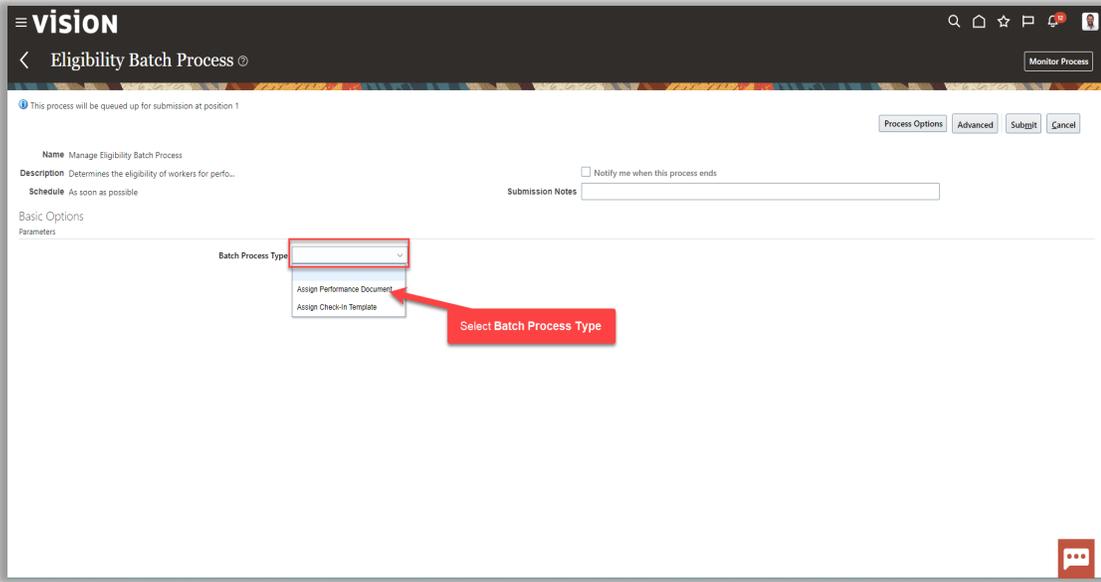
Enter the **Document Details** and the **Reason** and click **Submit**



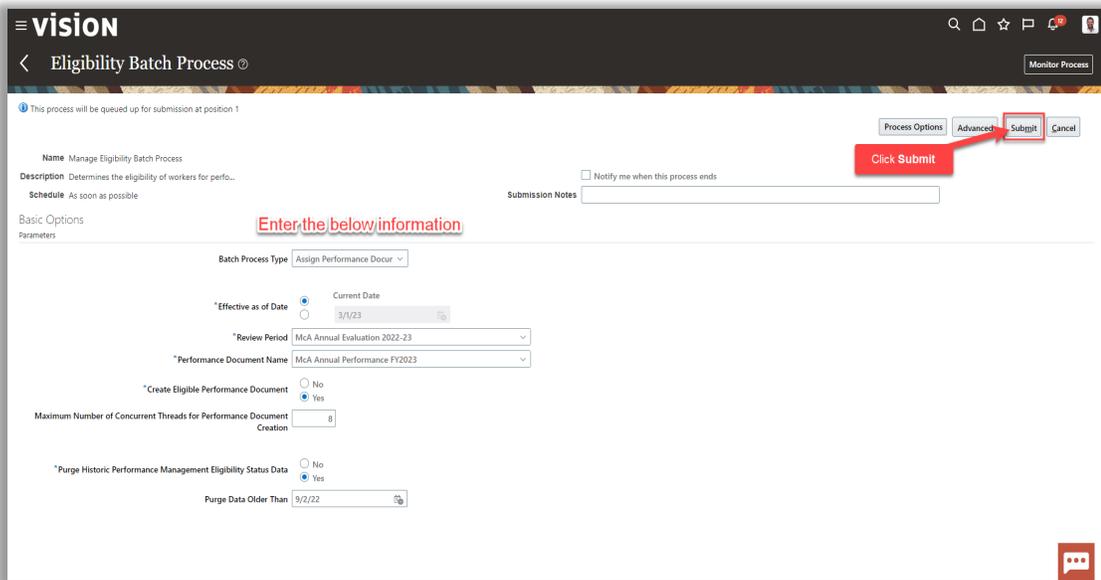
Navigate back to the **Performance** home page and click **Eligibility Batch Process**



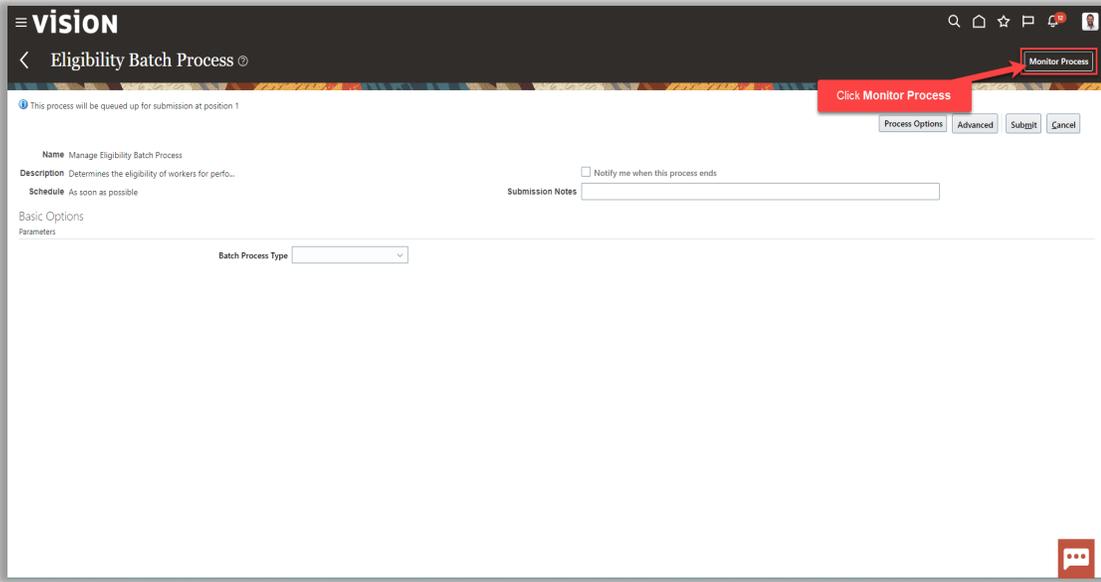
Select **Batch Process Type**



Enter the **Basic Options** and click **Submit**



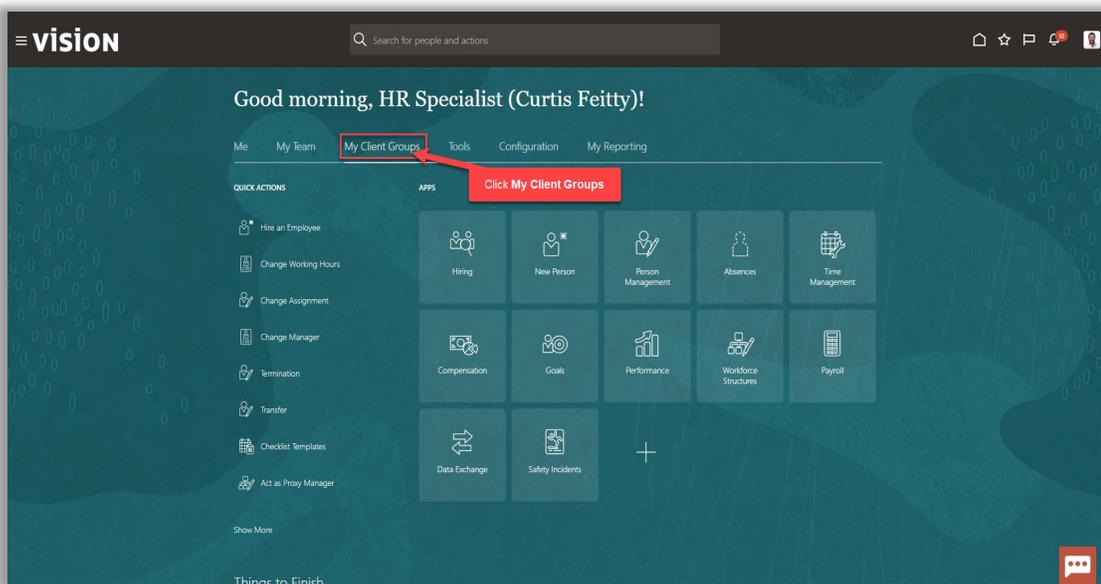
Lastly, click **Monitor Process** to view the status of the process



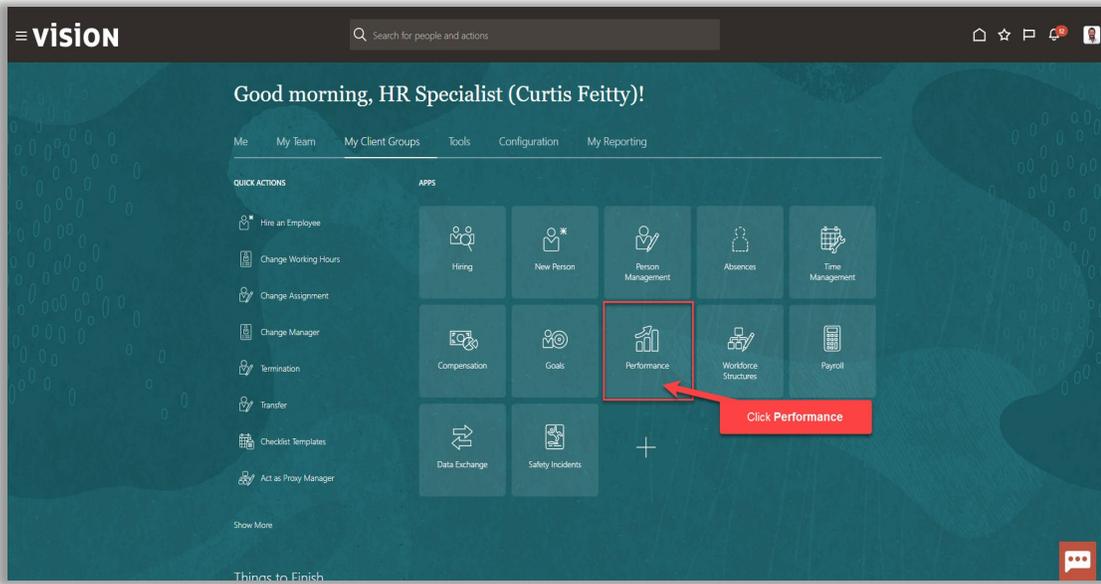
## Search For Organization Performance Documents

Navigation: Home>My Client Groups>Performance>Performance Document> Search and Select Document>Search Document Using Filters

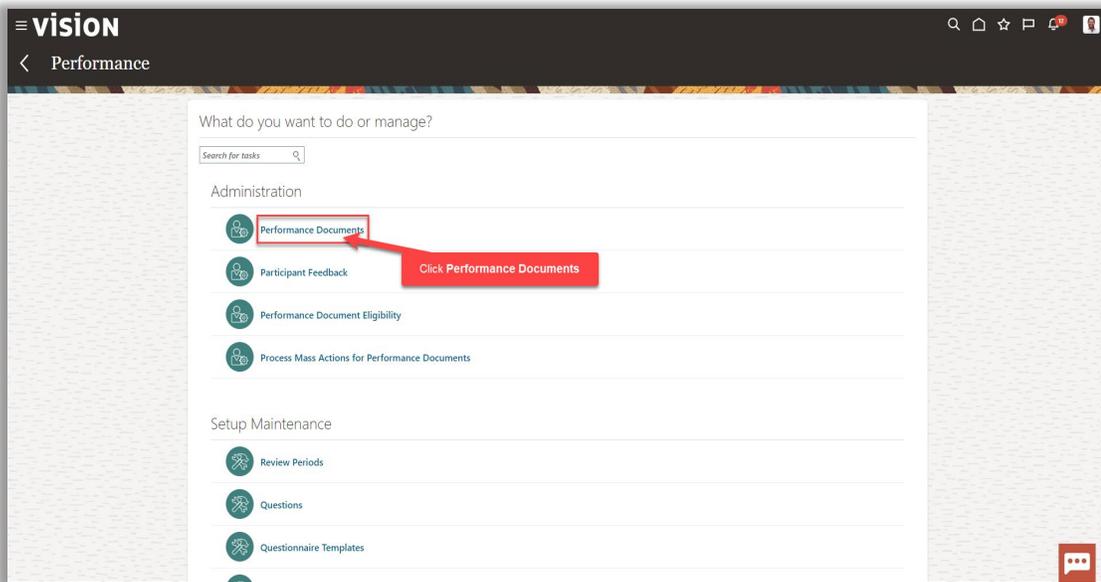
From the home screen, click **My Client Groups**



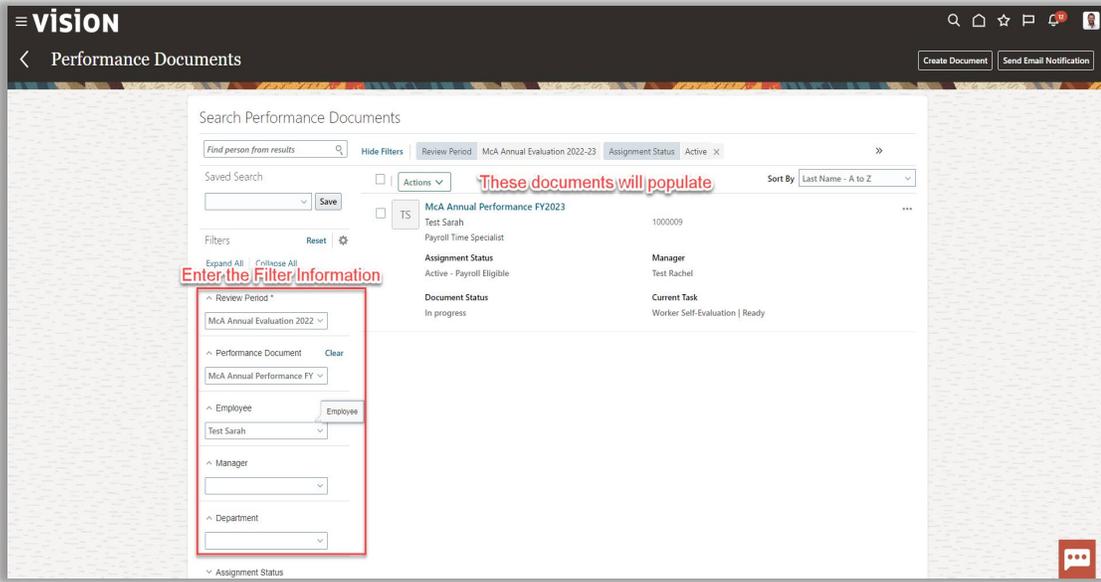
Next, click **Performance**



## Click Performance Document



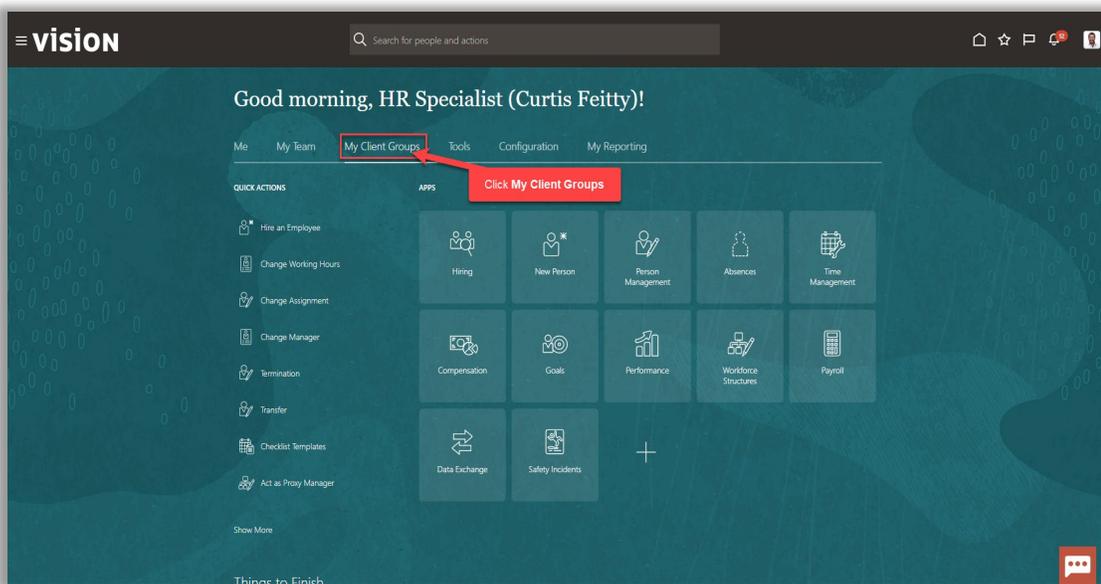
Using the **Filters**, enter the search criteria. The **Performance Documents** associated to the search criteria will populate



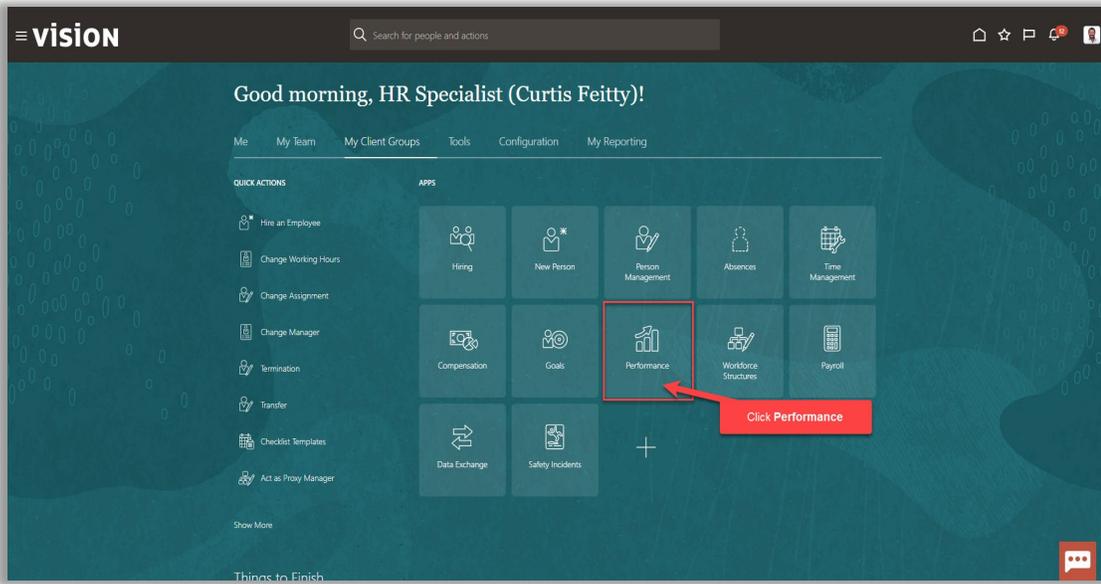
## Send Email Notification

Navigation: Home>My Client Groups>Performance>Performance Document> Search and Select Document>Send Email Notification>Enter Information>Send

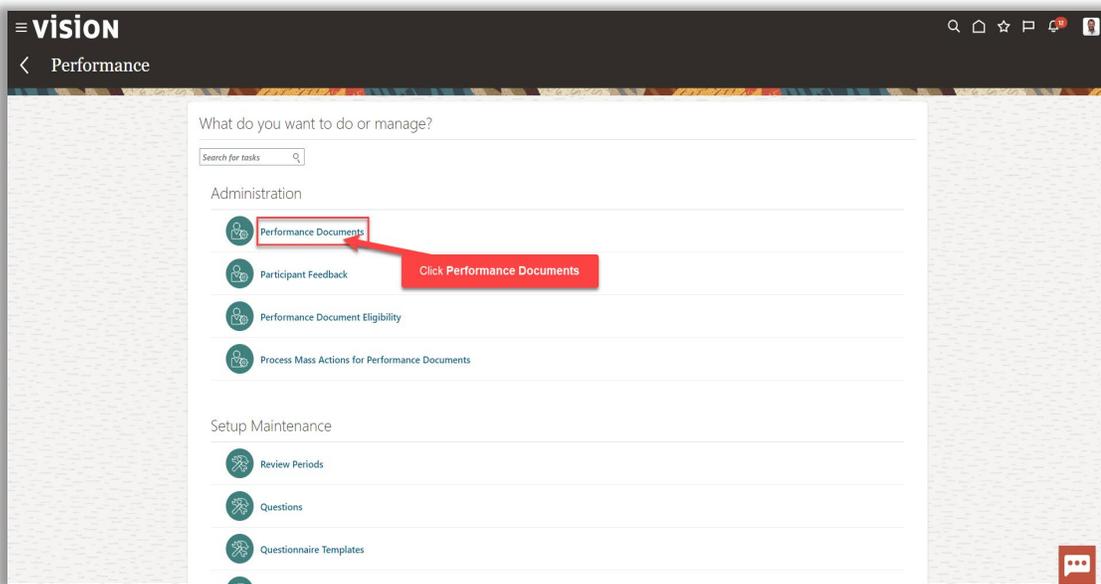
From the home screen, click **My Client Groups**



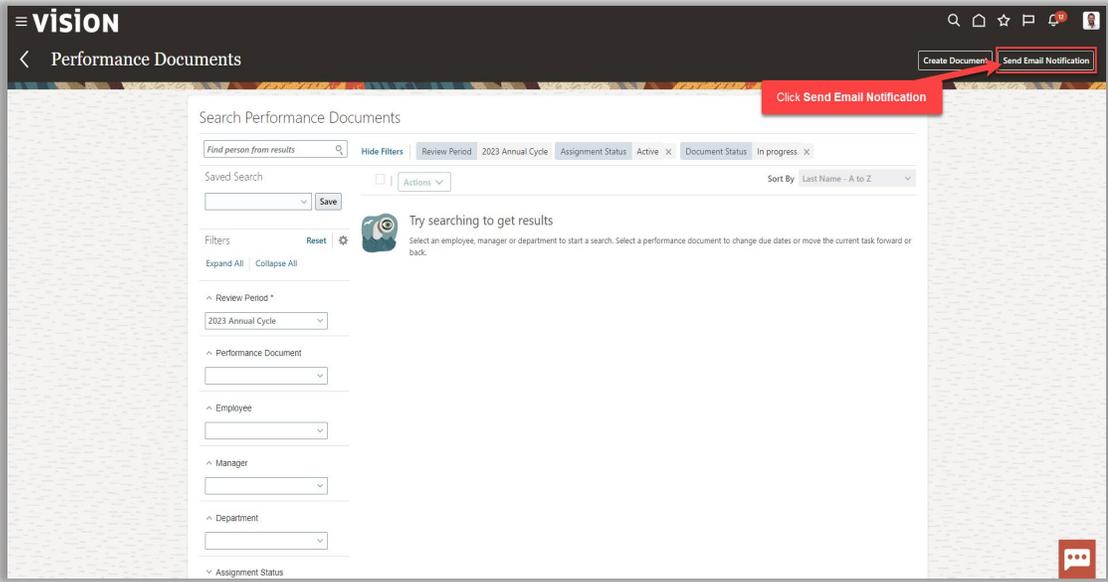
Next, click **Performance**



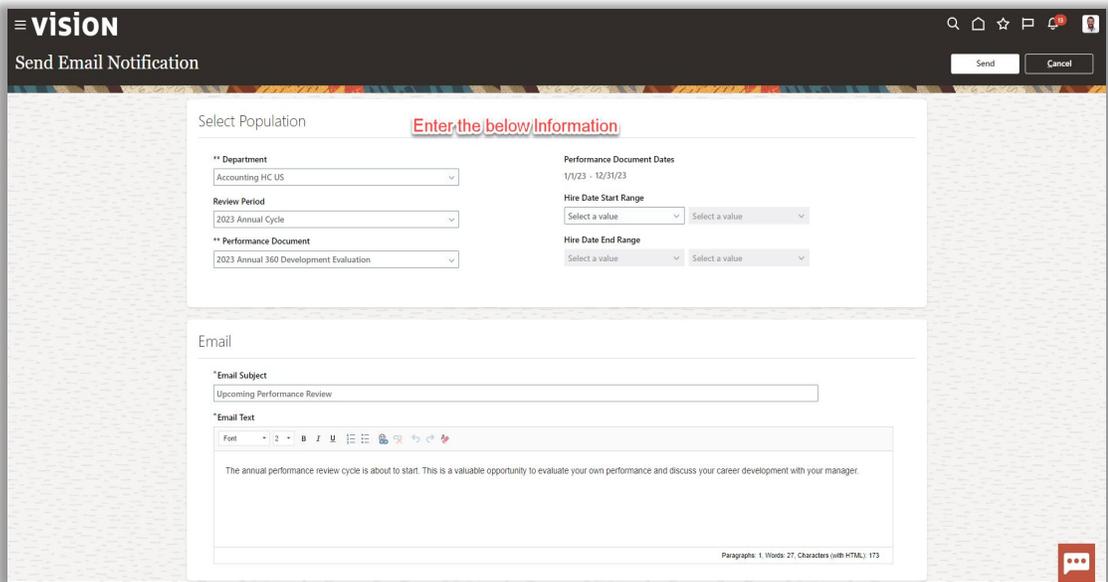
**Click Performance Document**



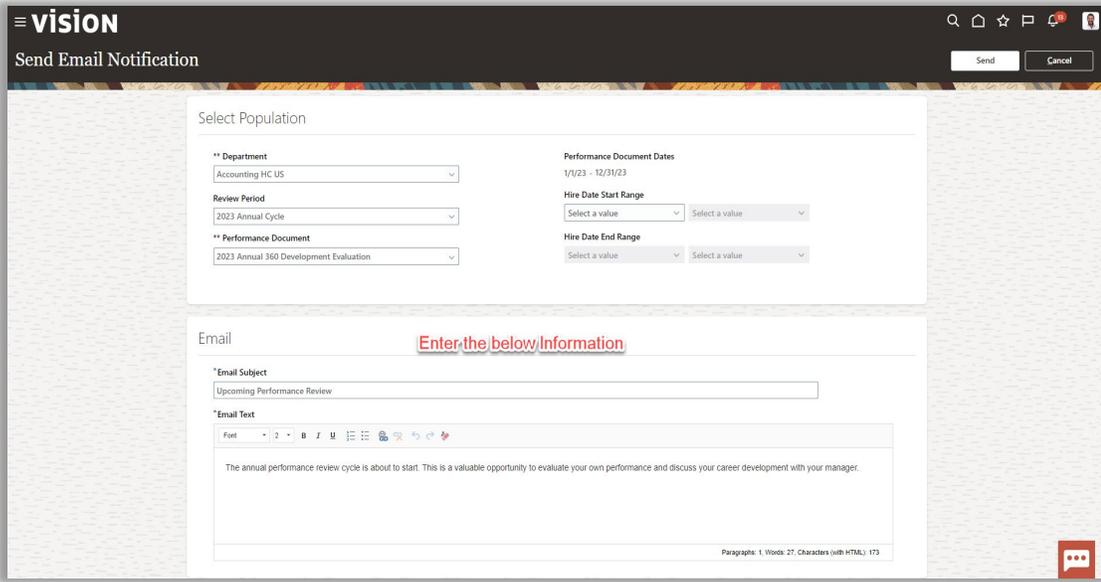
**Click Send Email Notification**



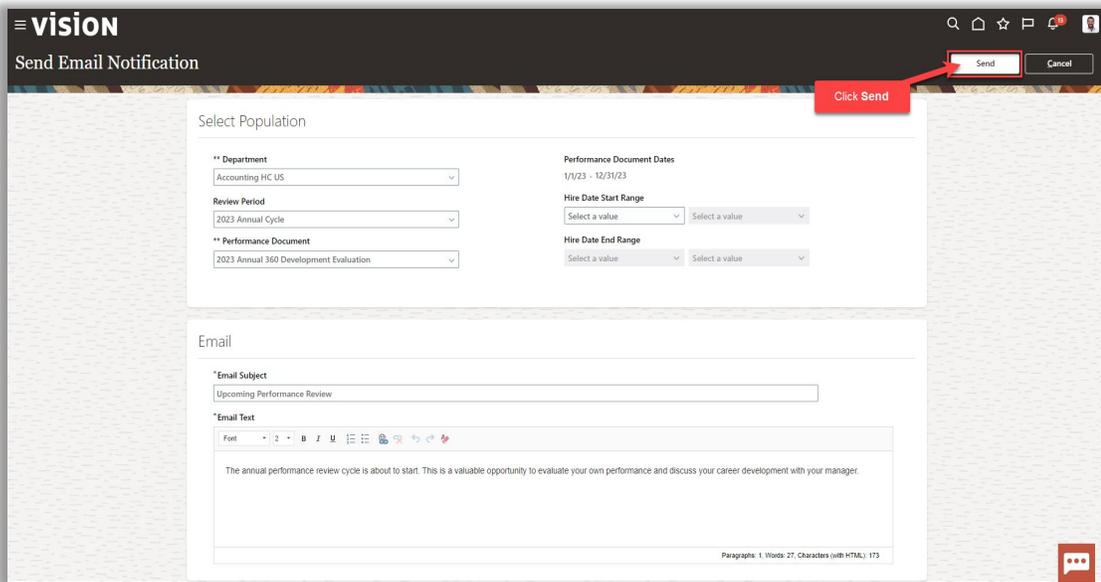
Next, we need to enter the **Select Population Information**



Next, enter the **Email Information**



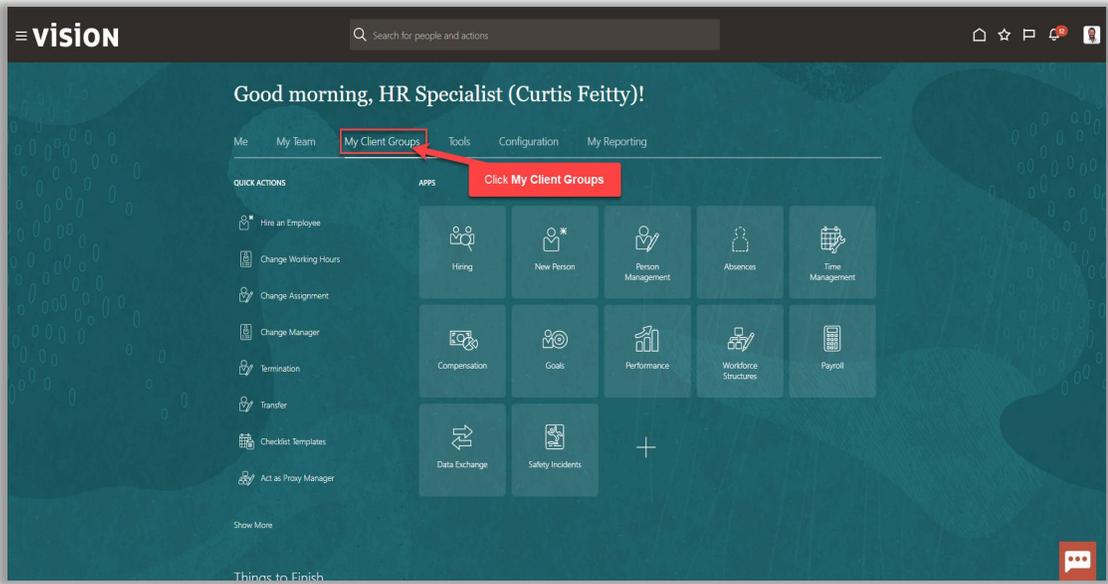
Click Send



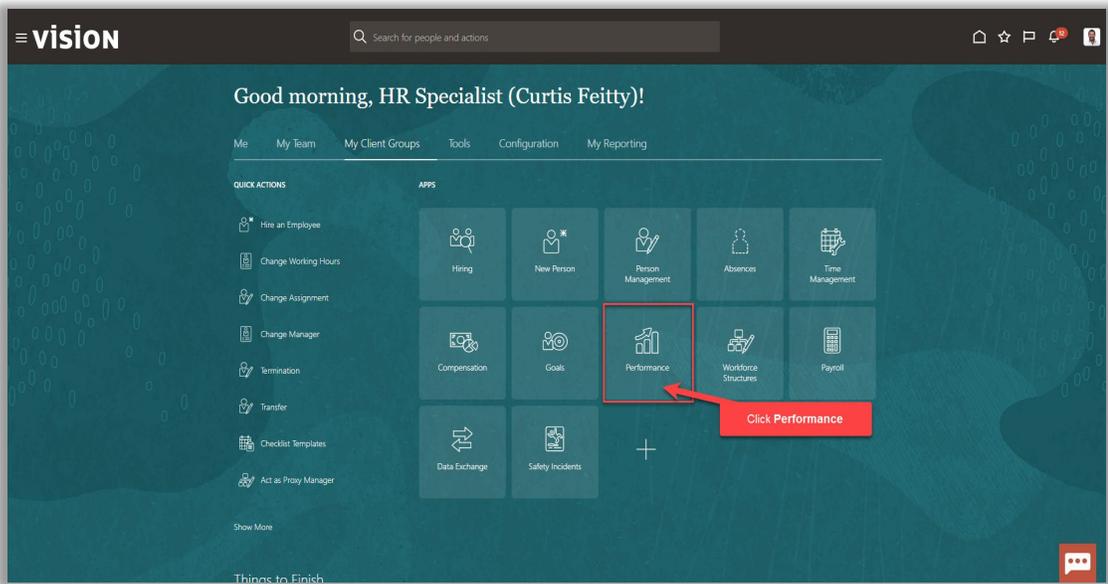
## Transfer Performance Documents

Navigation: Home>My Client Groups>Performance>Performance Document> Search and Select Document>Actions>Transfer>Enter Details>Submit

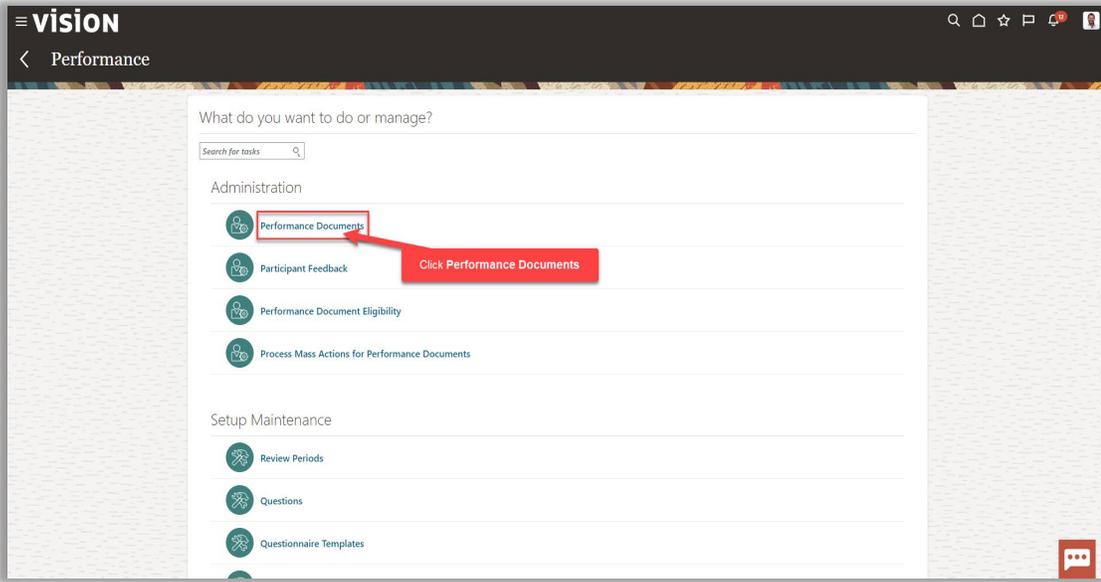
From the home screen, click **My Client Groups**



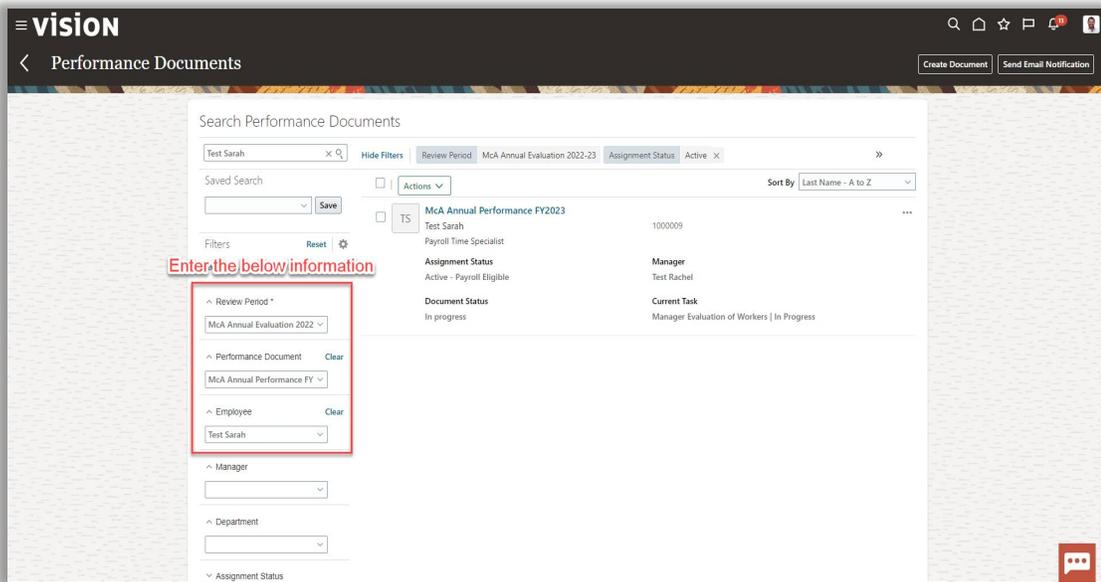
Next, click **Performance**



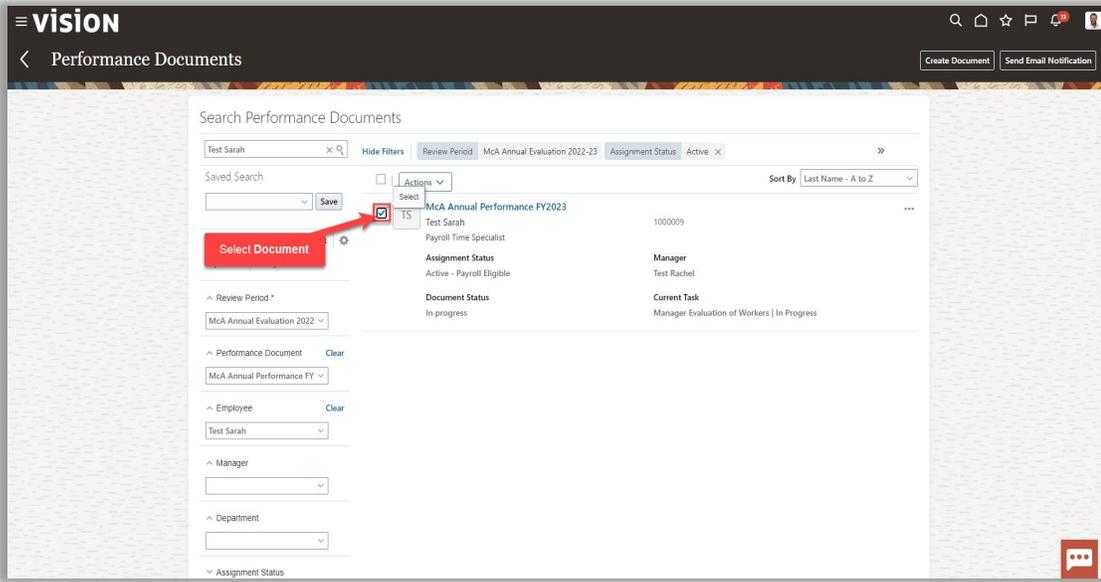
Click **Performance Document**



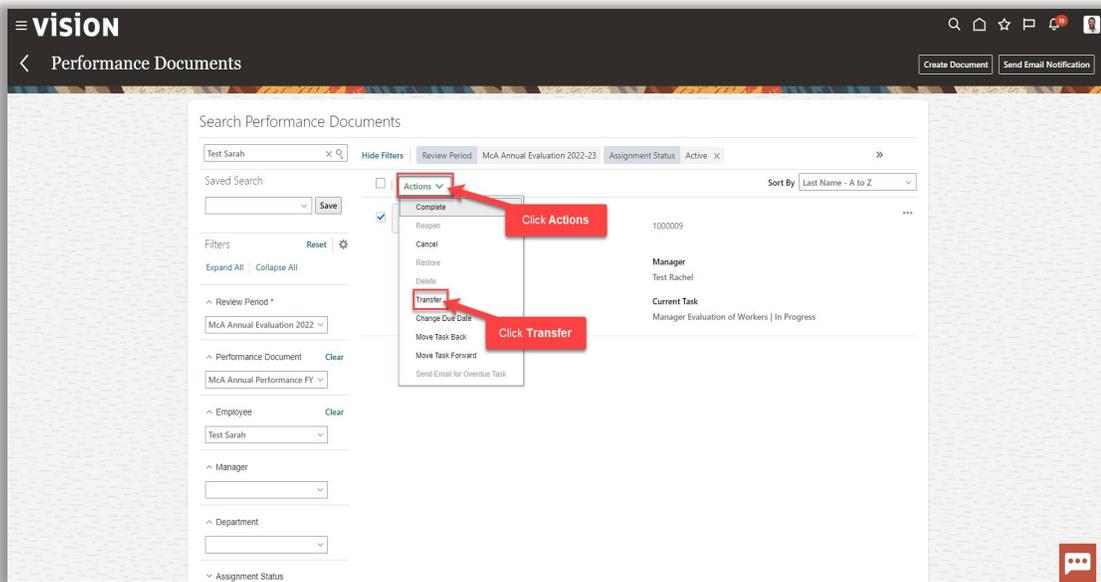
Search for the **Performance Document** by entering the **Review Period**, **Performance Document**, and **Employee**



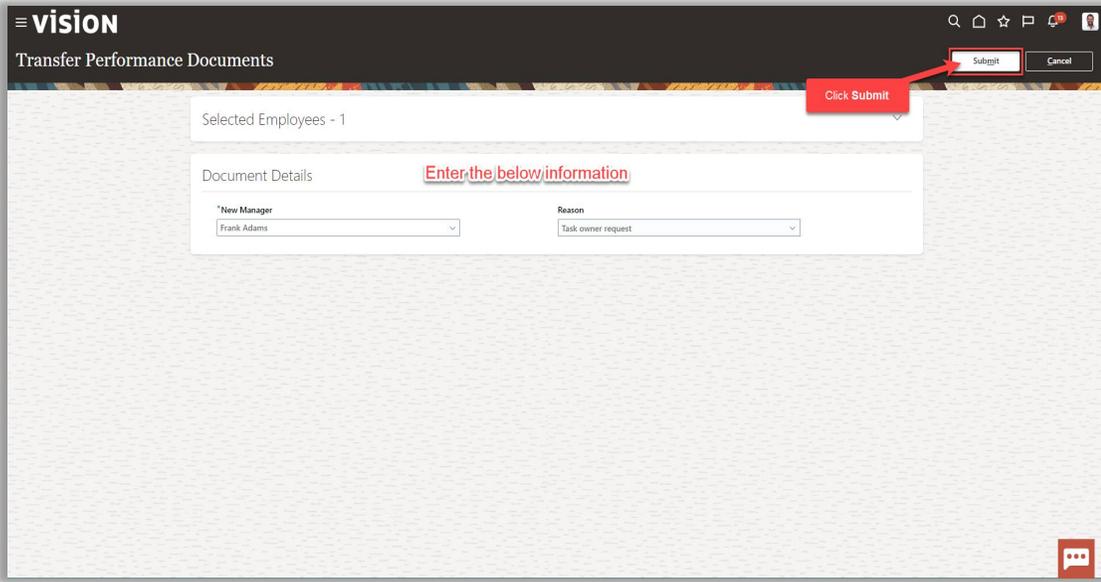
Select the **Performance Document**



Select Actions then Transfer



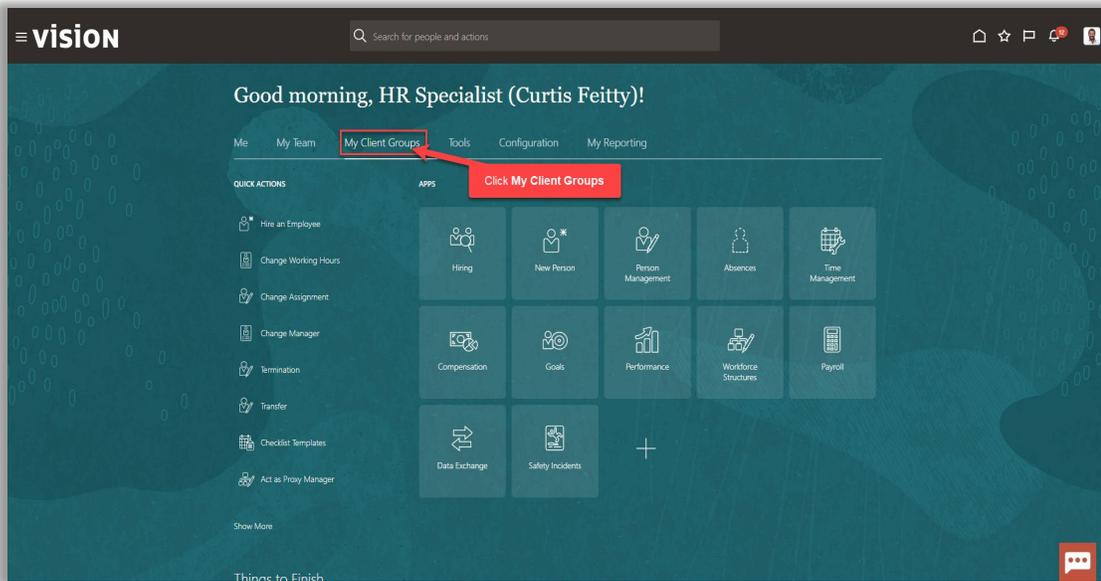
Enter the Document Details and click Submit



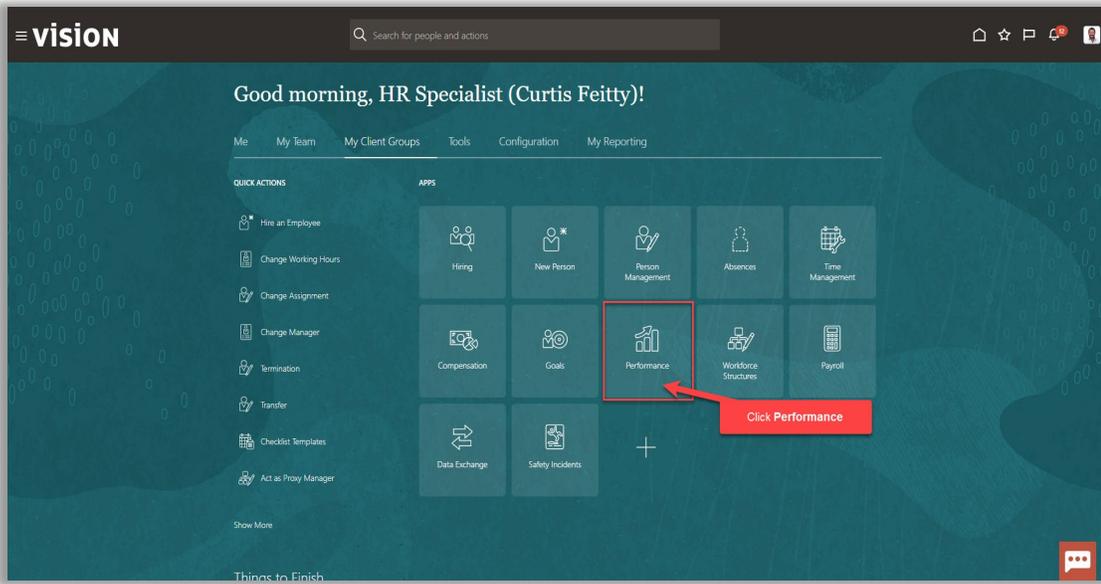
## Change Due Date

Navigation: Home>My Client Groups>Performance>Performance Document> Search and Select Document>Actions>Change Due Date>Enter Details>Submit

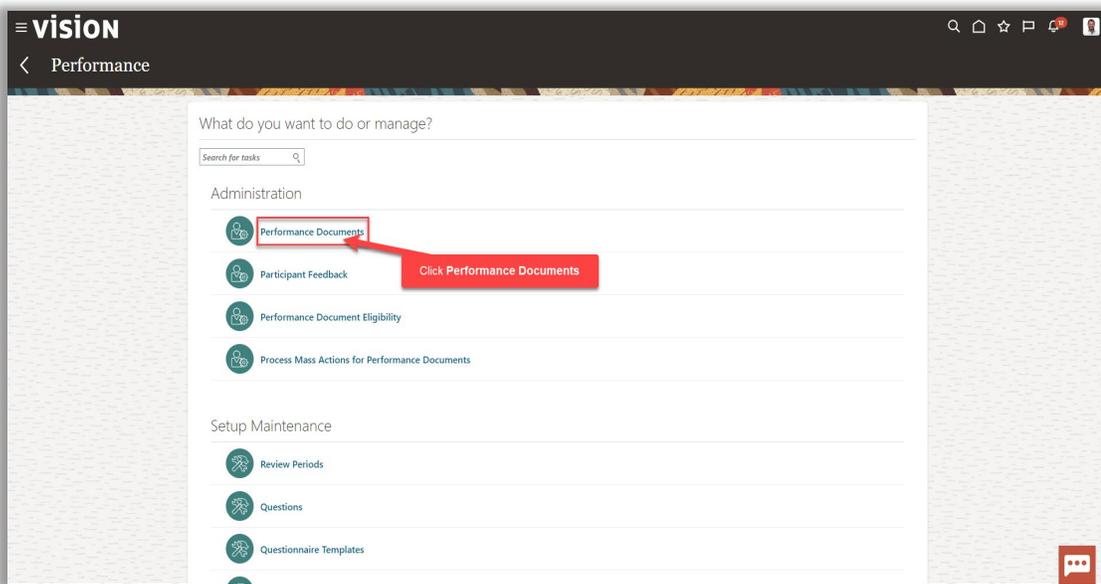
From the home screen, click **My Client Groups**



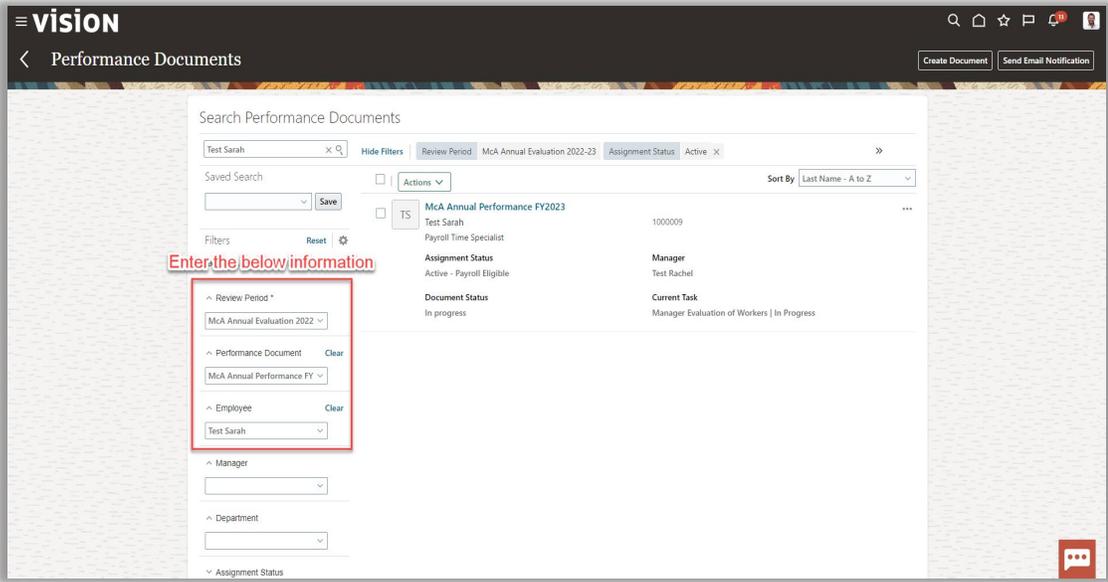
Next, click **Performance**



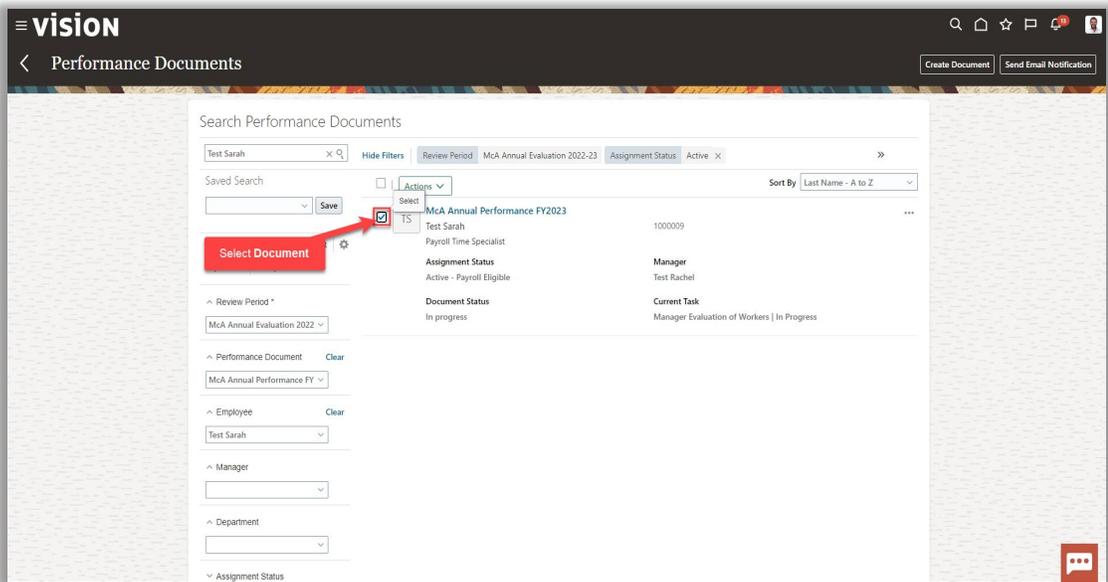
Click Performance Document



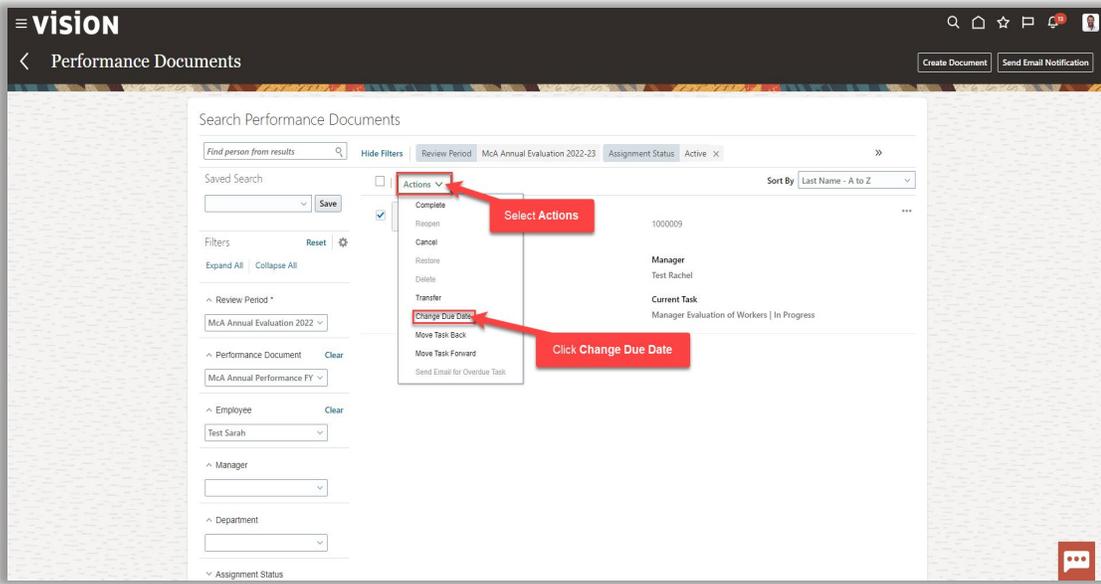
Search for the Performance Document by entering the Review Period, Performance Document, and Employee



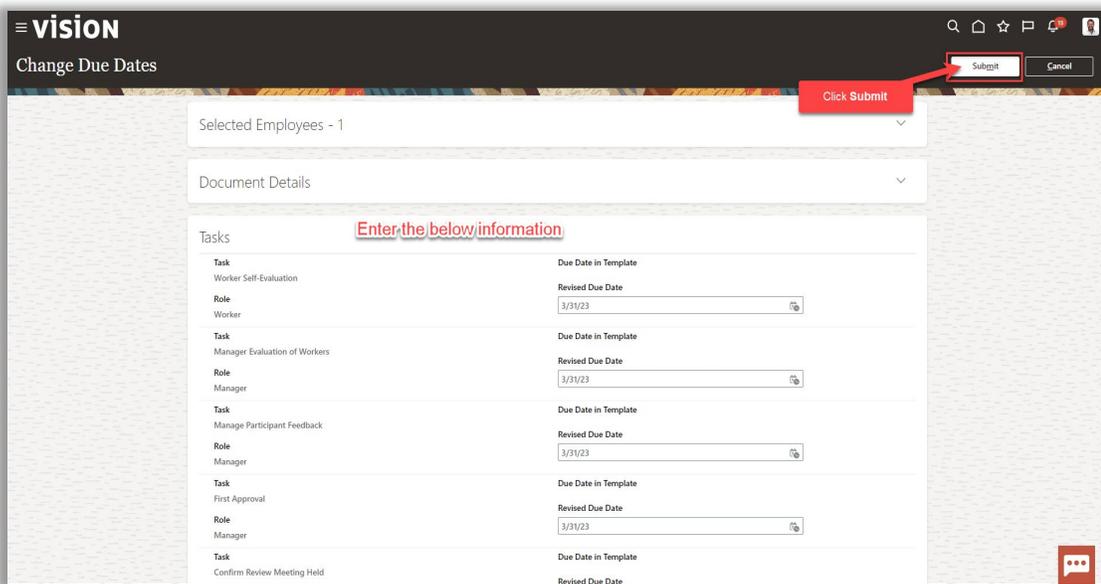
### Select the Performance Document



### Select Actions then Change Due Date



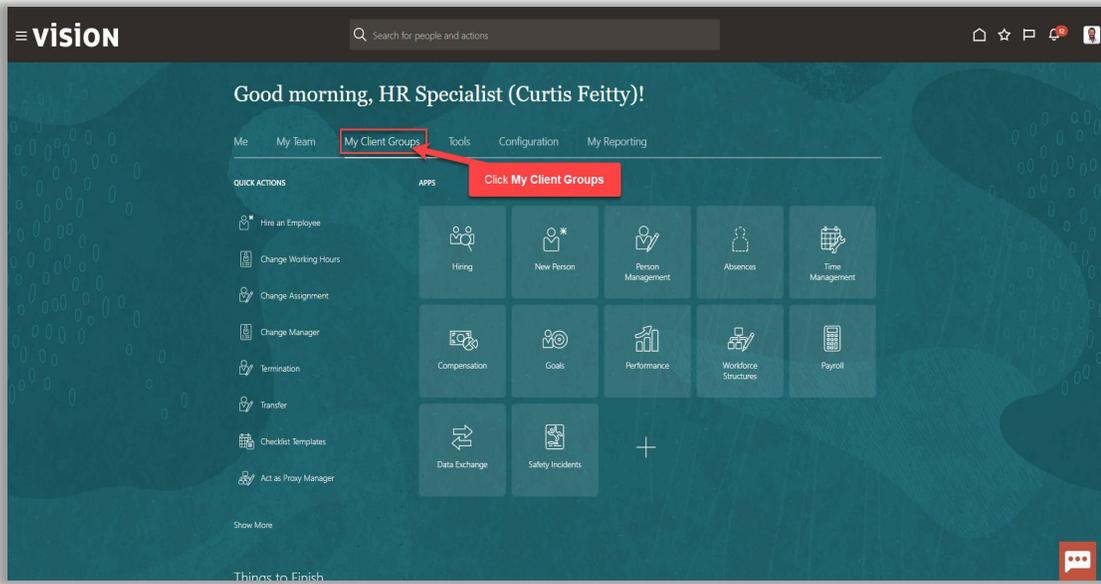
Enter the **Tasks** information and click **Submit**



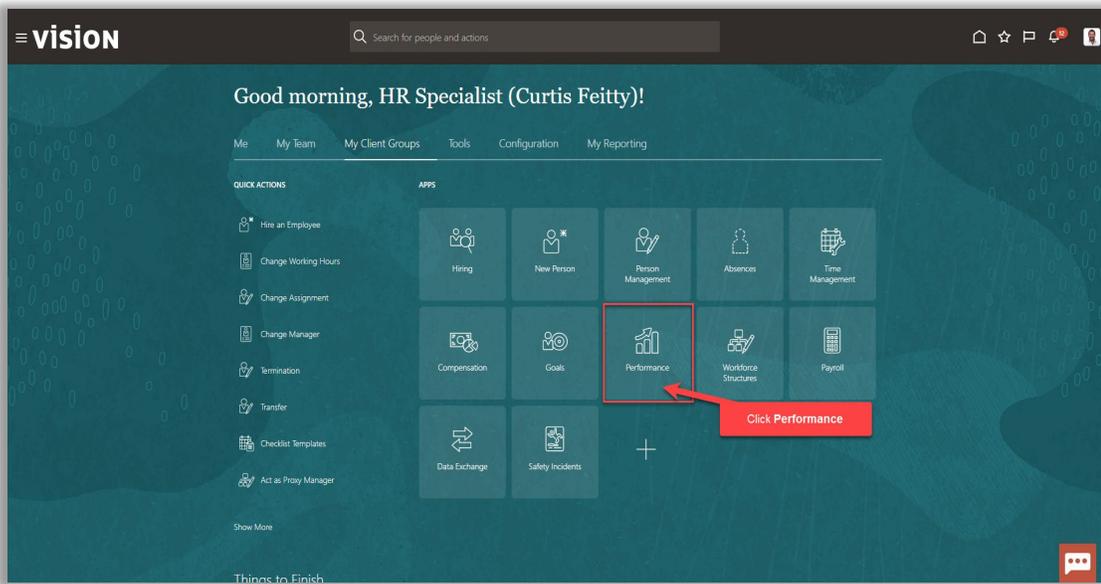
## Cancel Performance Documents

Navigation: Home>My Client Groups>Performance>Performance Document> Search and Select Document>Actions>Cancel>Enter Details>Submit

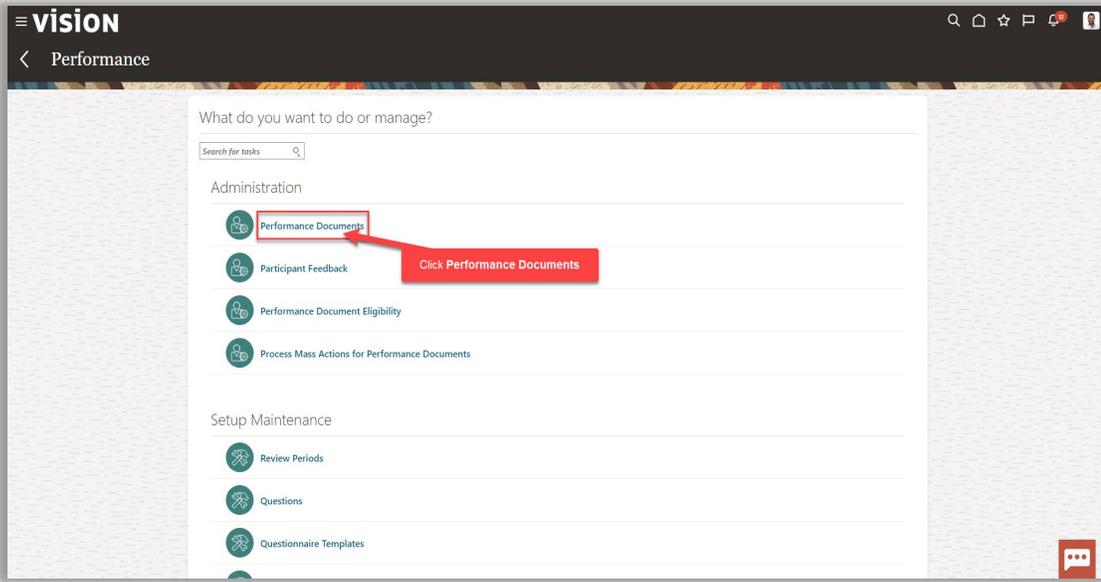
From the home screen, click **My Client Groups**



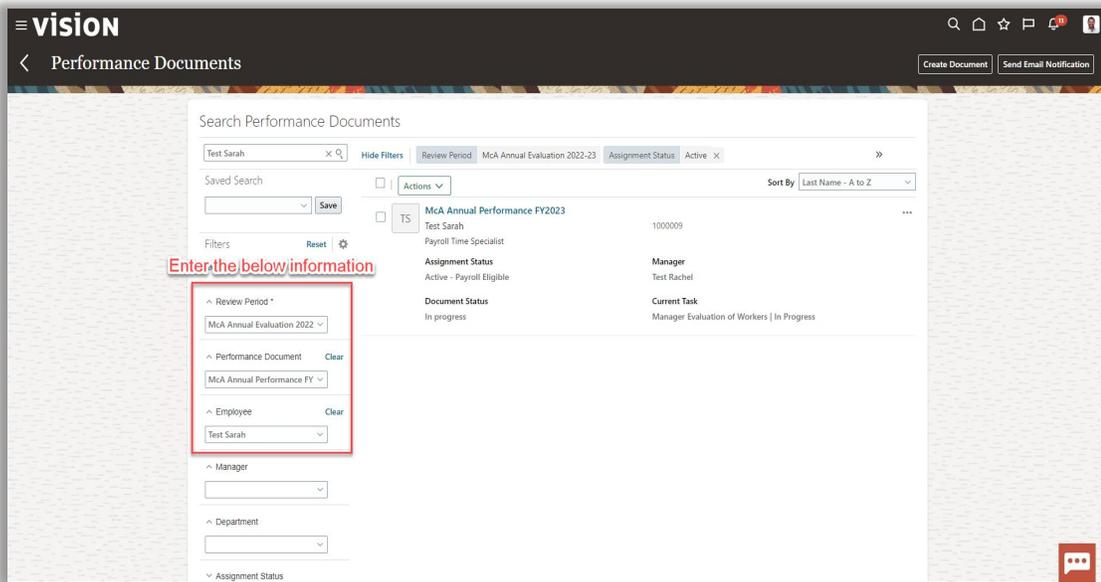
Next, click **Performance**



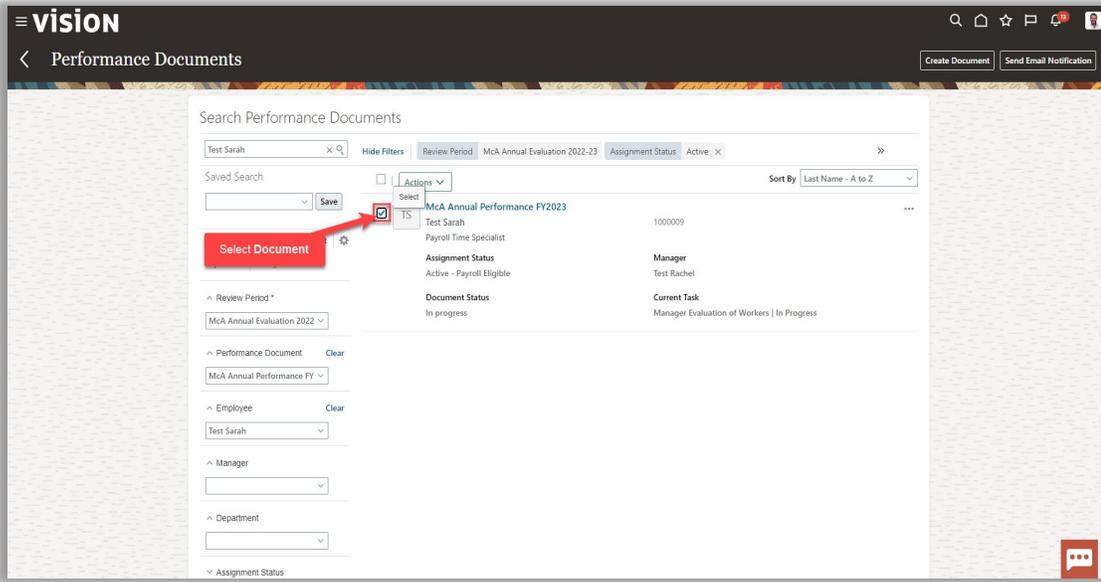
Click **Performance Document**



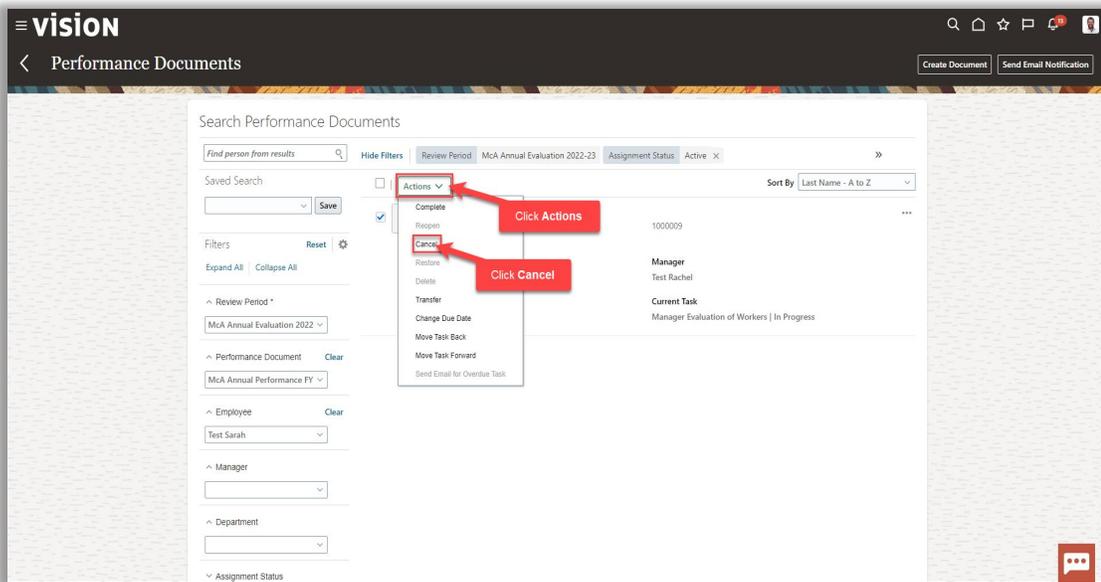
Search for the **Performance Document** by entering the **Review Period**, **Performance Document**, and **Employee**



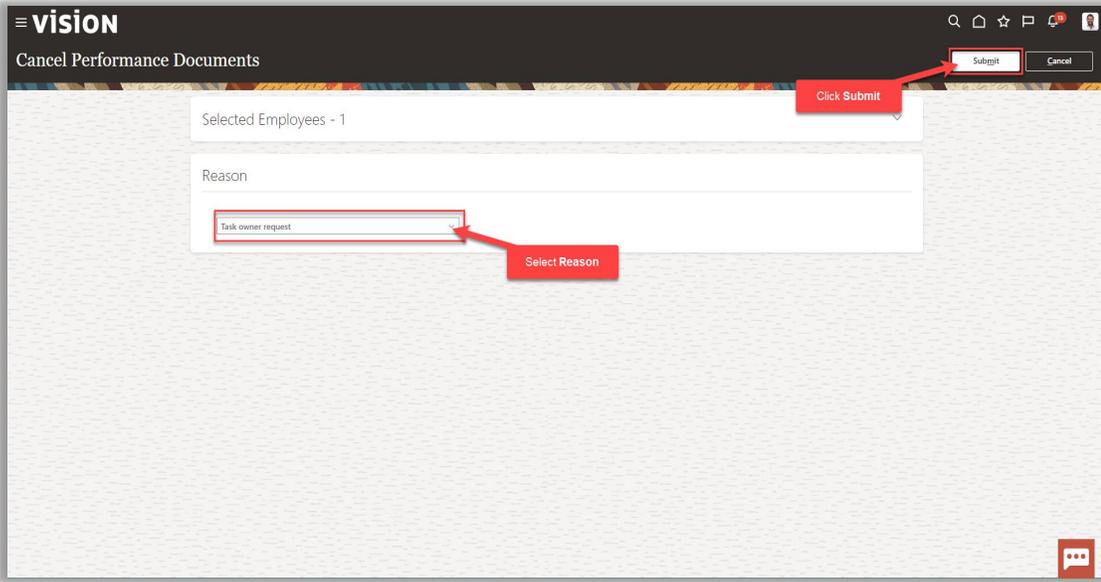
Select the **Performance Document**



Select Actions then Cancel



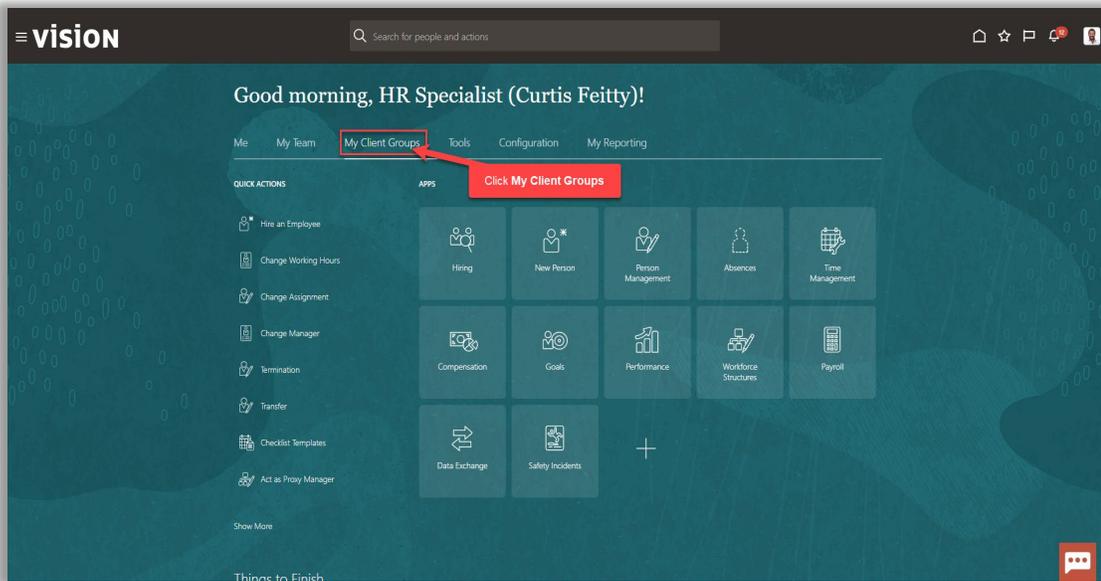
Enter the Reason and click Submit



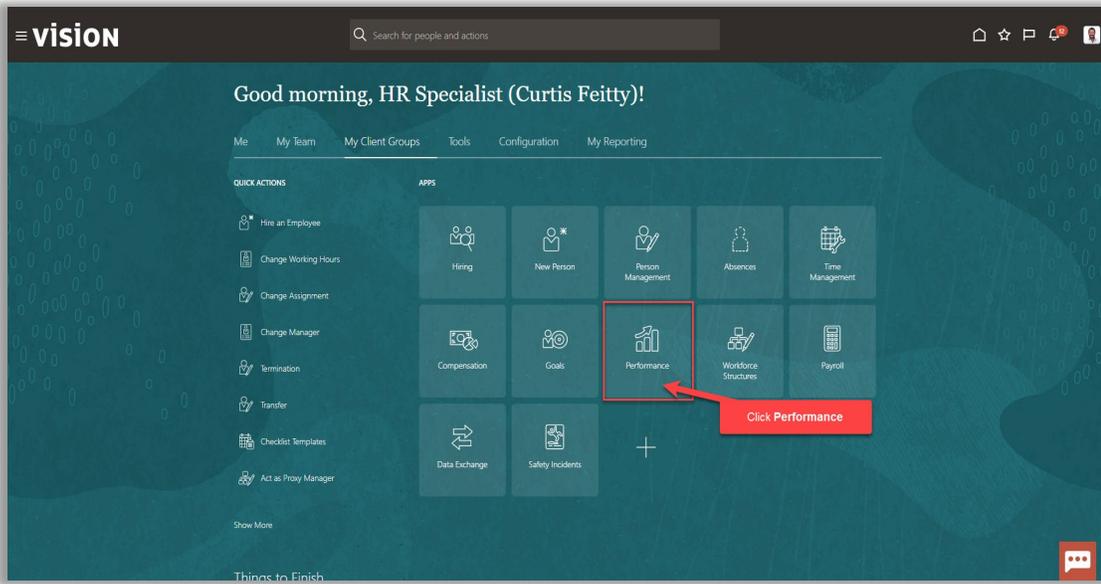
## Delete Performance Documents

Navigation: Home>My Client Groups>Performance>Performance Document>Search and Select Document>Actions>Delete>Enter Details>Submit

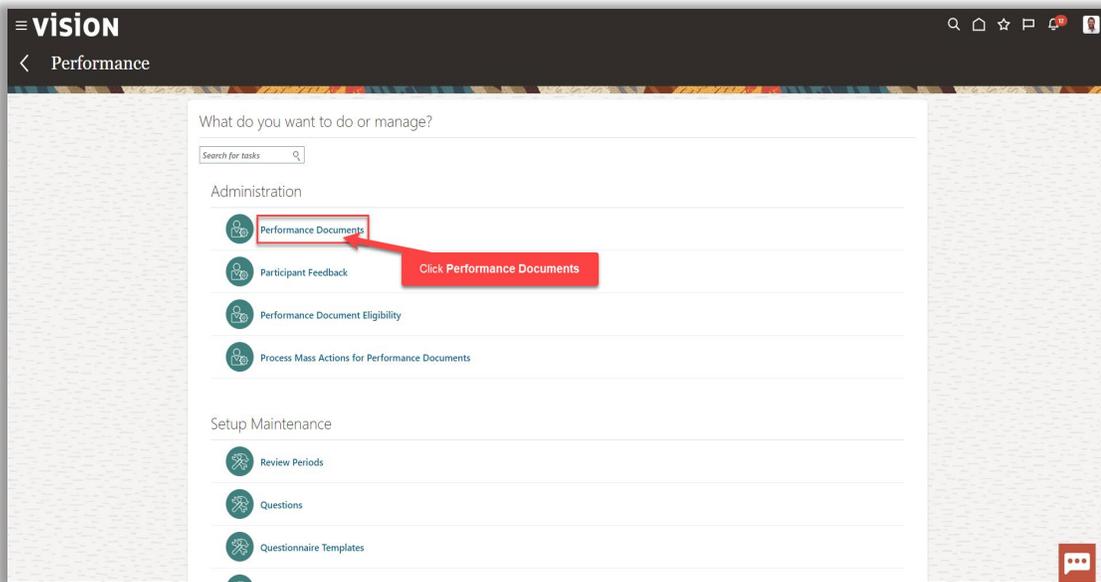
From the home screen, click **My Client Groups**



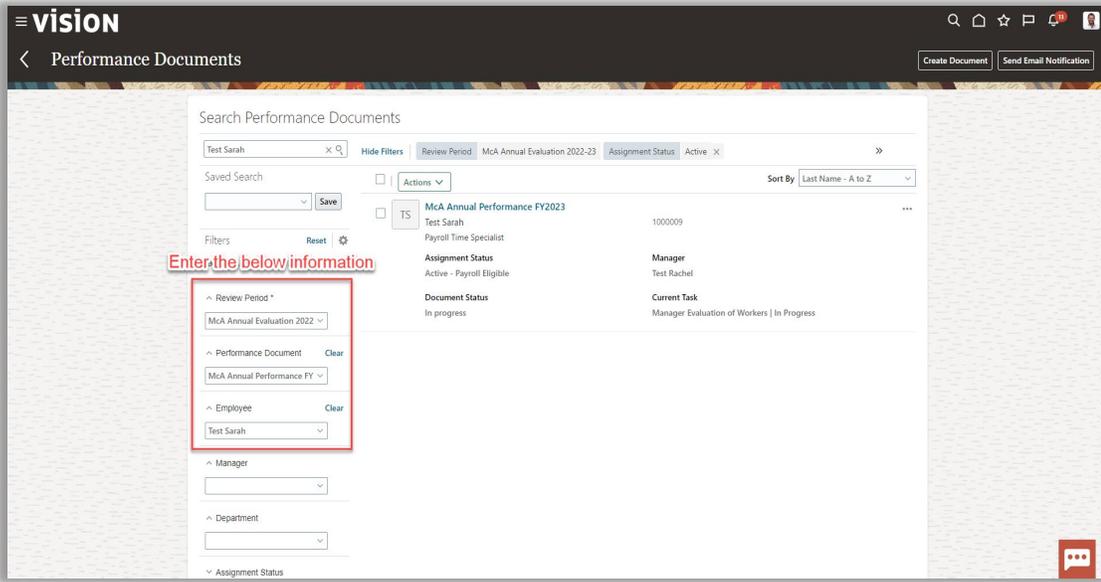
Next, click **Performance**



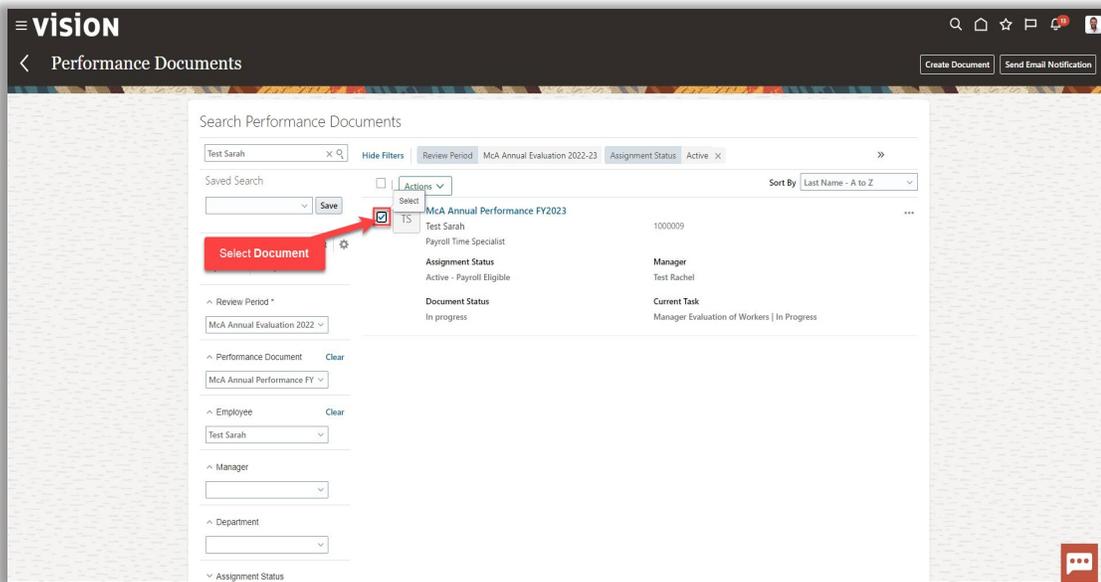
Click Performance Document



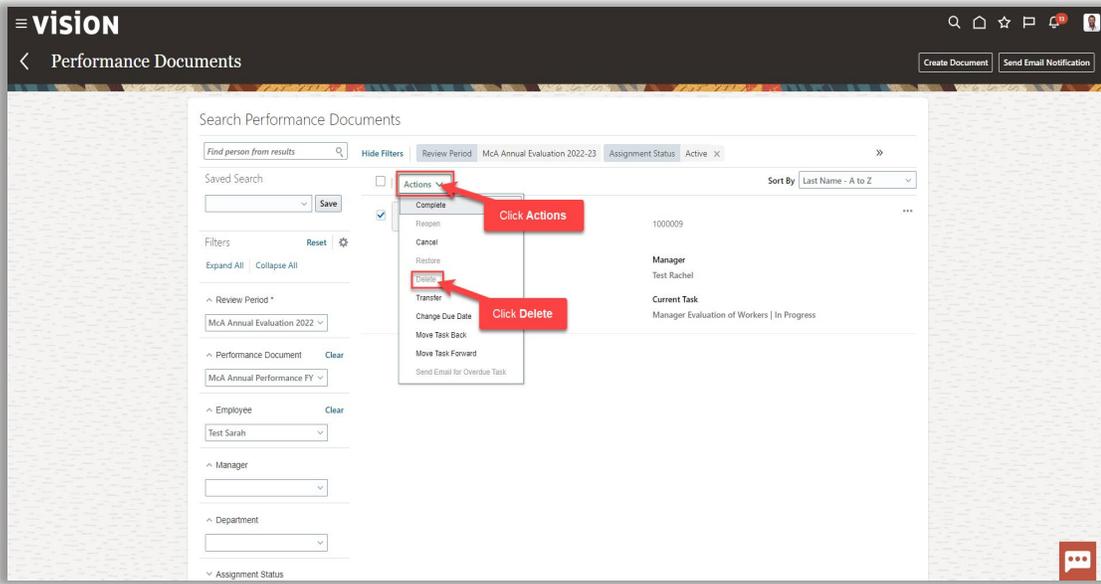
Search for the Performance Document by entering the Review Period, Performance Document, and Employee



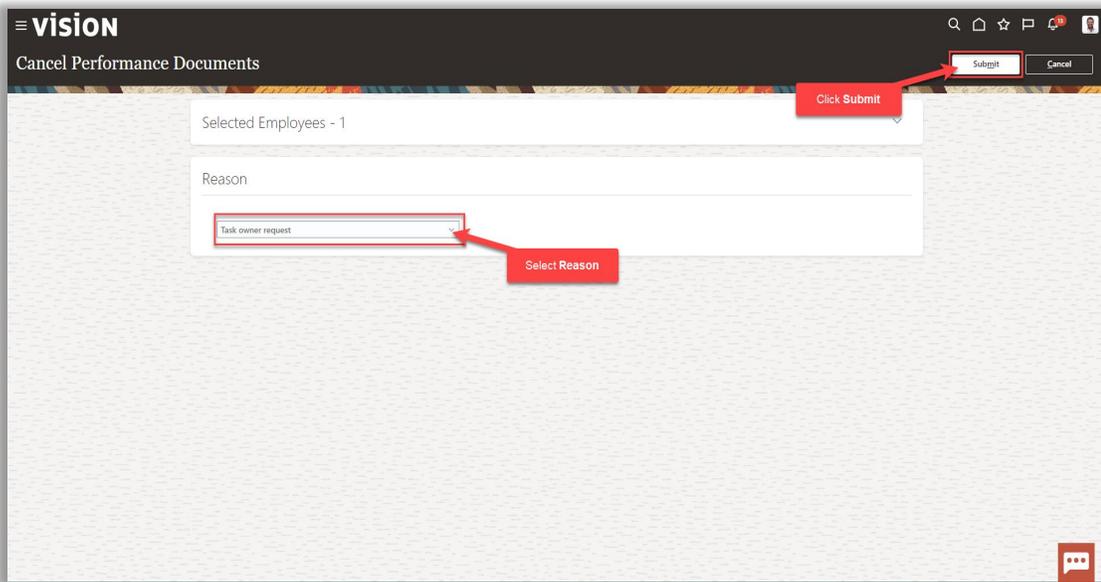
### Select the Performance Document



Select **Actions** then **Delete**. As a note, if the **Delete** option is grayed out, the configurations do not support deleting a performance document; the configurations must be updated to allow a Performance Admin to delete a Performance Document



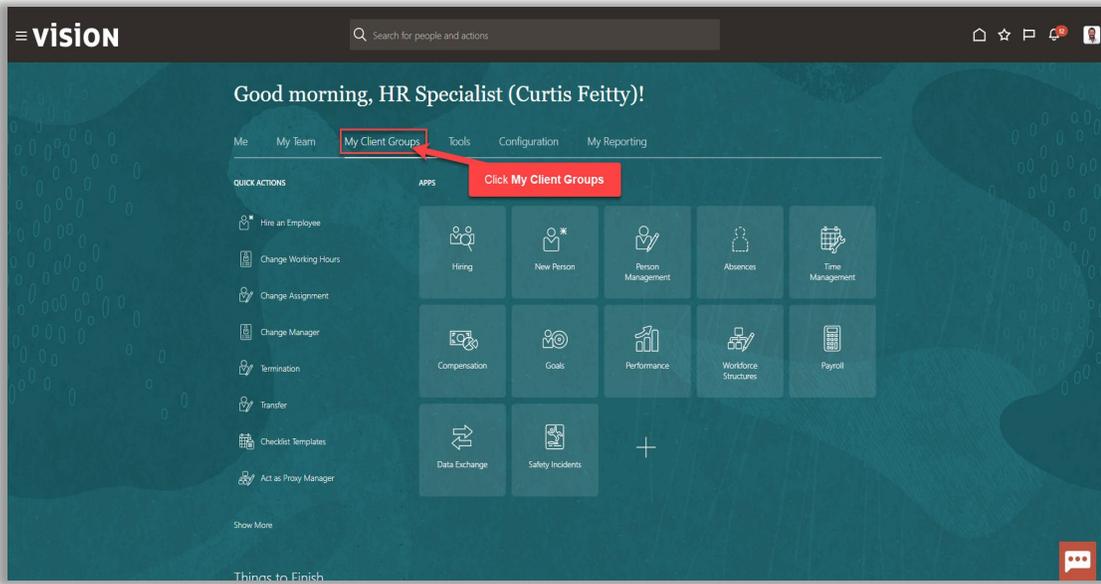
Enter the Reason and click Submit



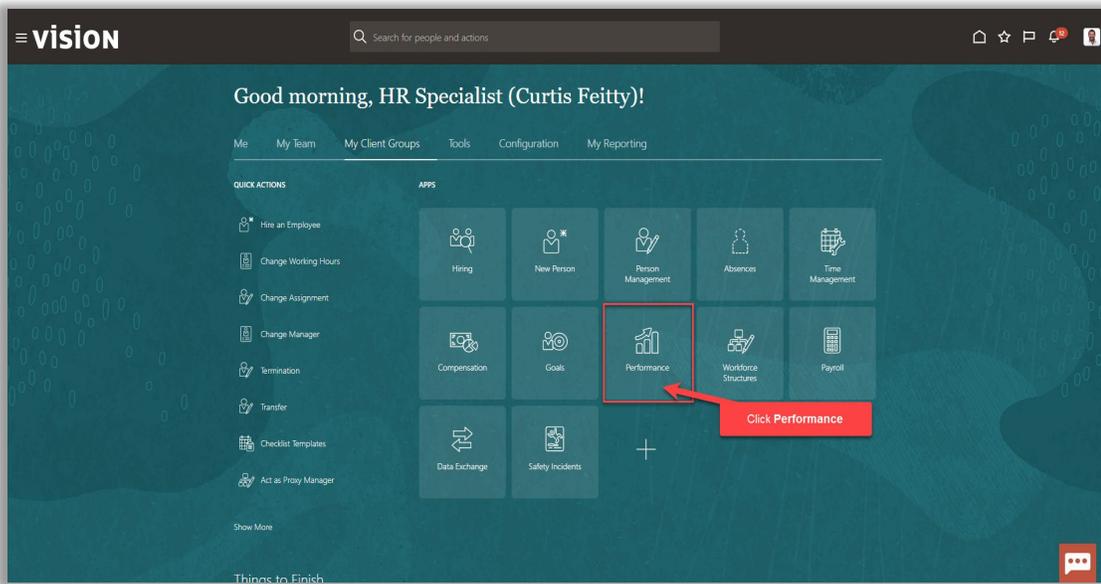
### Delete Participant Feedback

Navigation: Home>My Client Groups>Performance>Participant Feedback>Actions>Delete>Yes>Submit

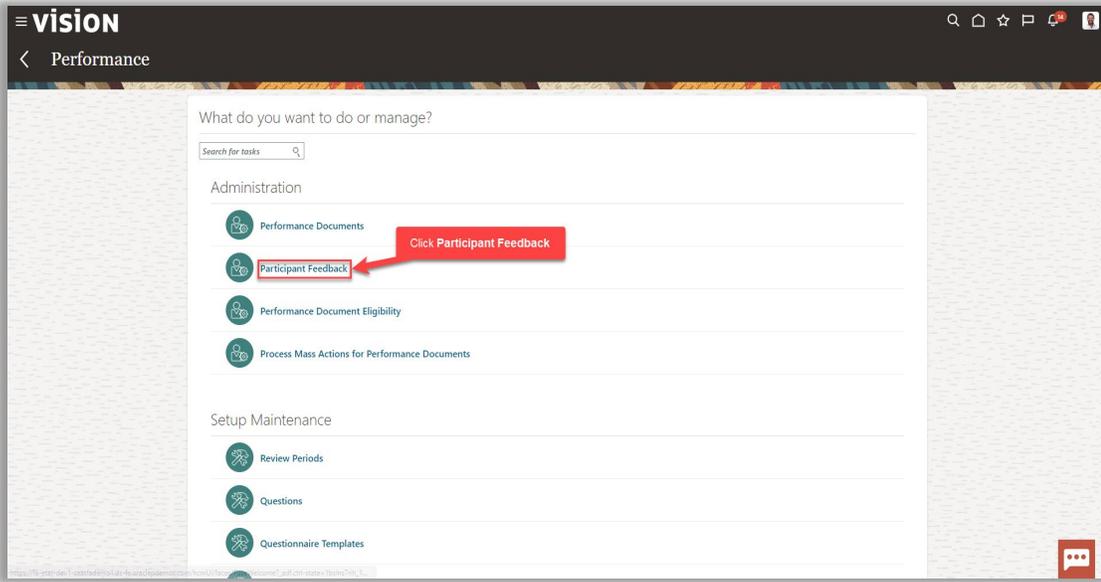
From the home screen, click **My Client Groups**



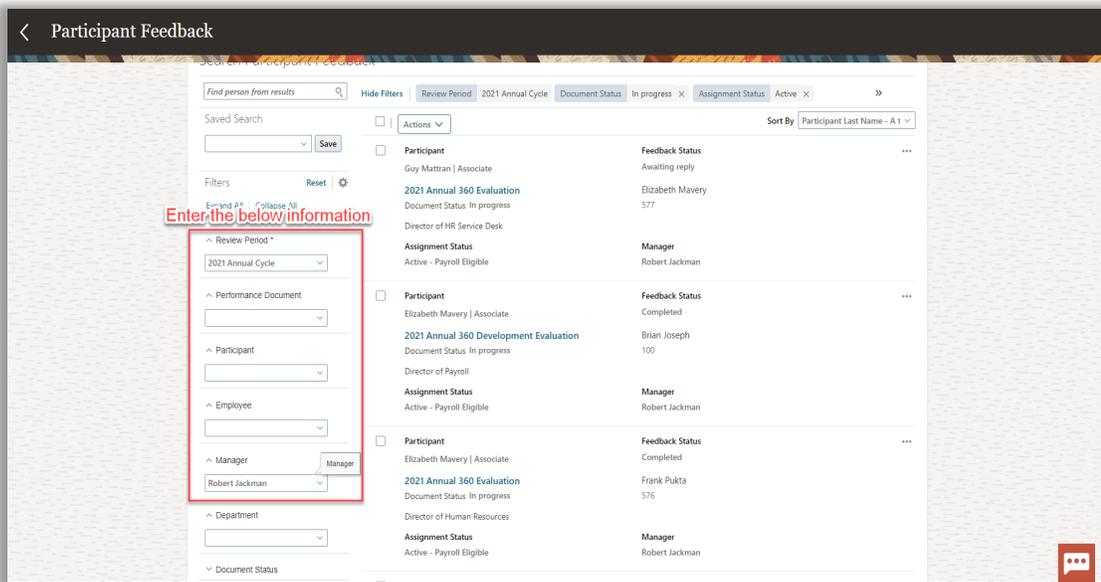
Next, click **Performance**



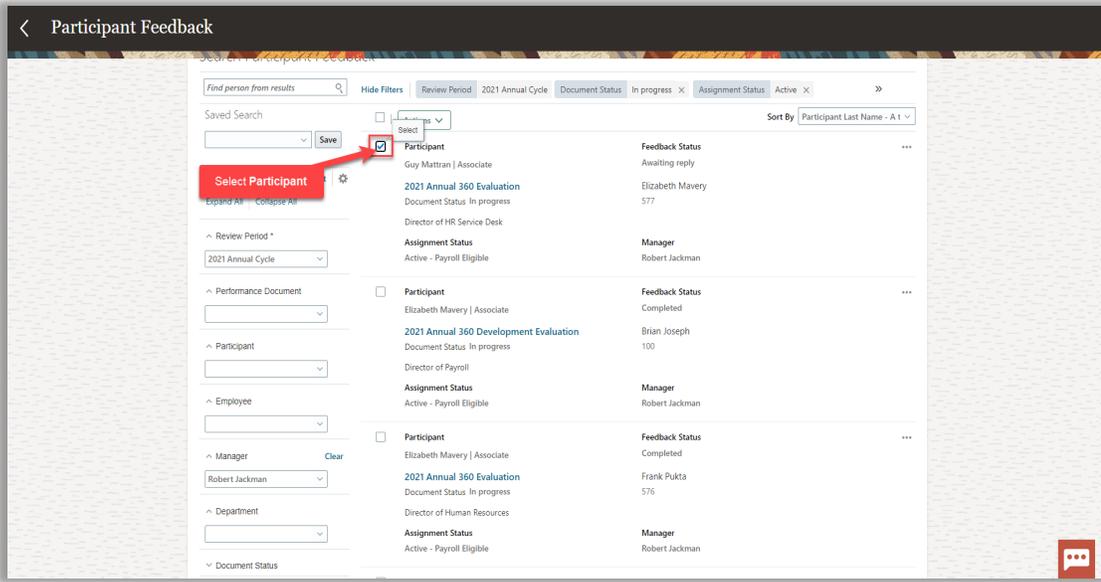
Click **Participant Feedback**



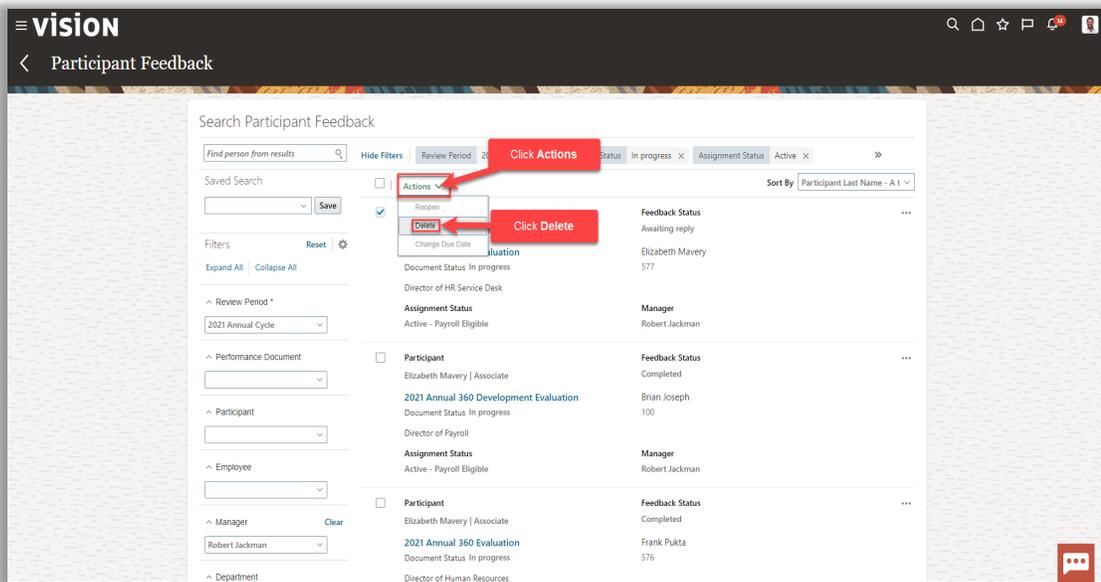
Search for the **Participant Feedback** by entering the **Filters** information



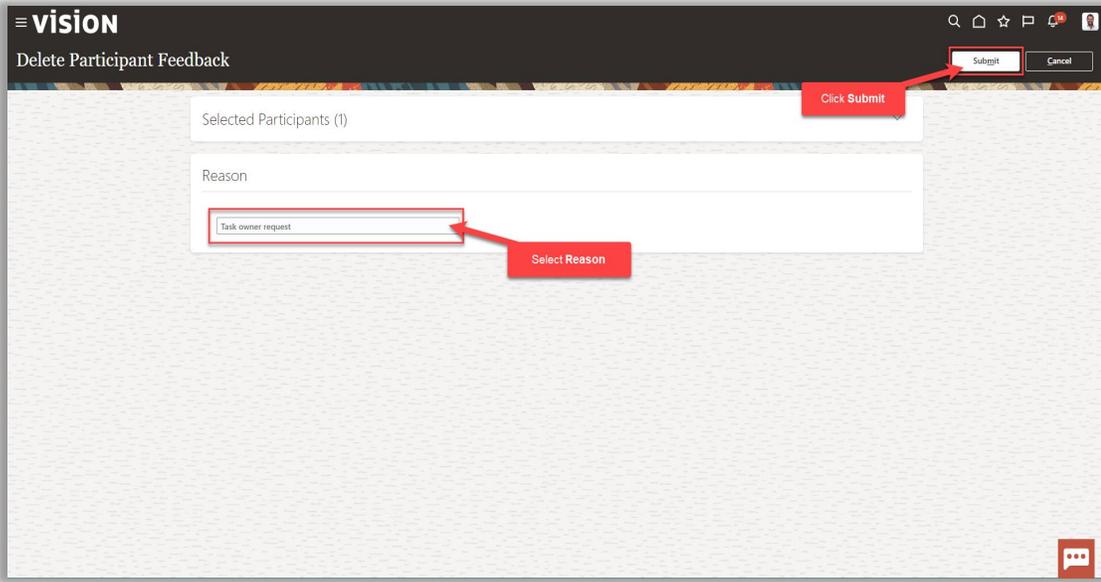
Select the **Participant**



Select Actions then Delete



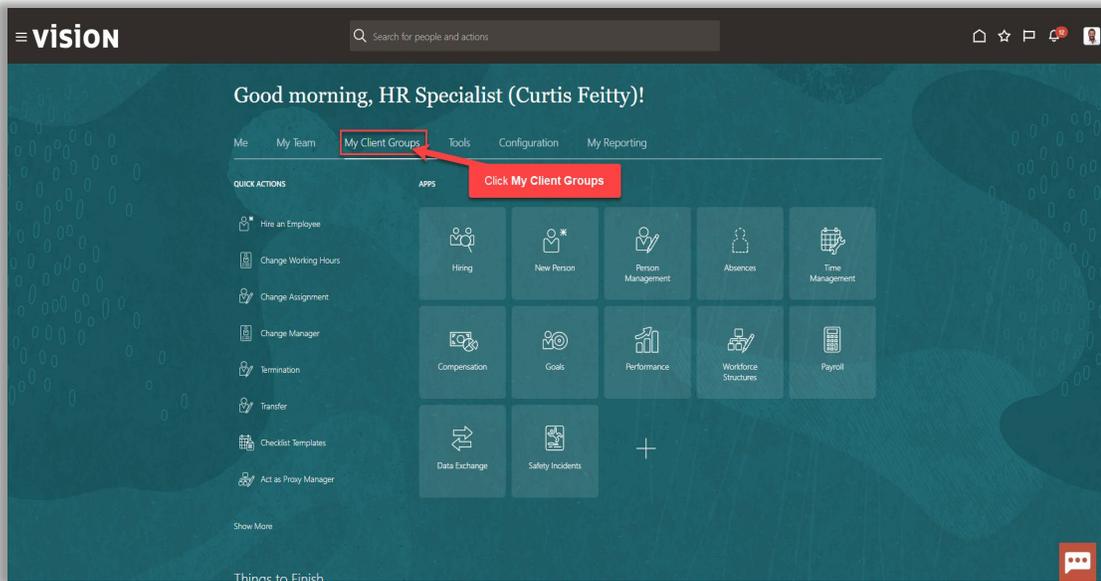
Enter the Reason and click Submit



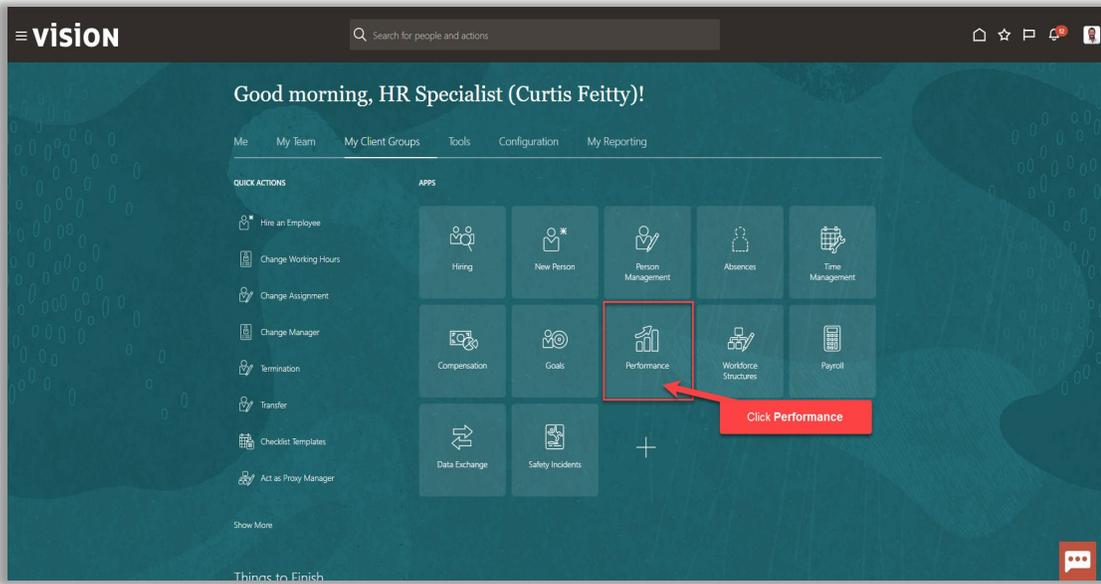
## Complete Performance Documents

Navigation: Home>My Client Groups>Performance>Performance Document>Search and Select Document>Actions>Complete>Enter Details>Submit

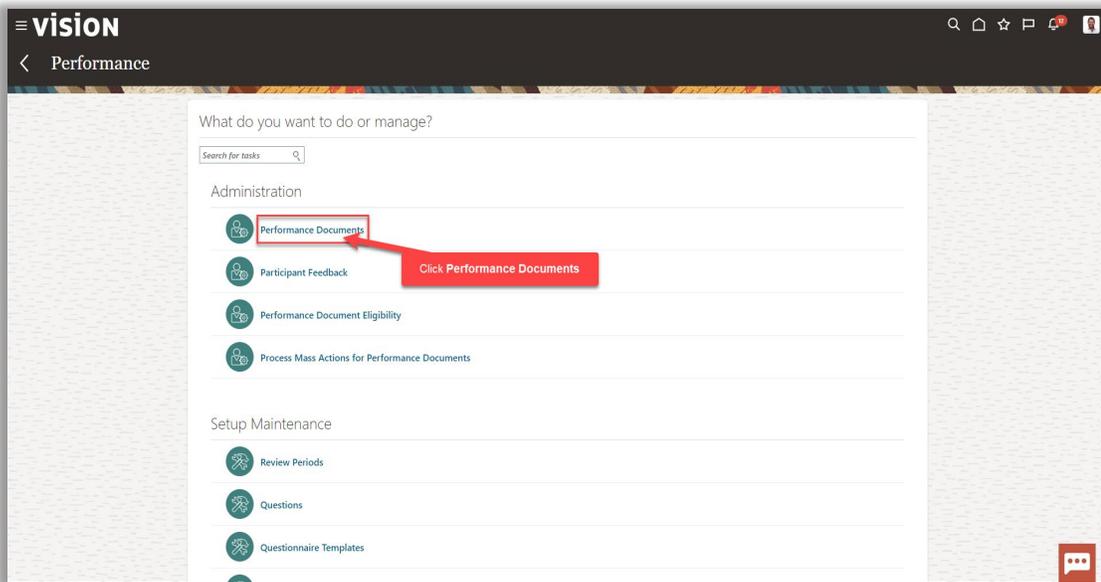
From the home screen, click **My Client Groups**



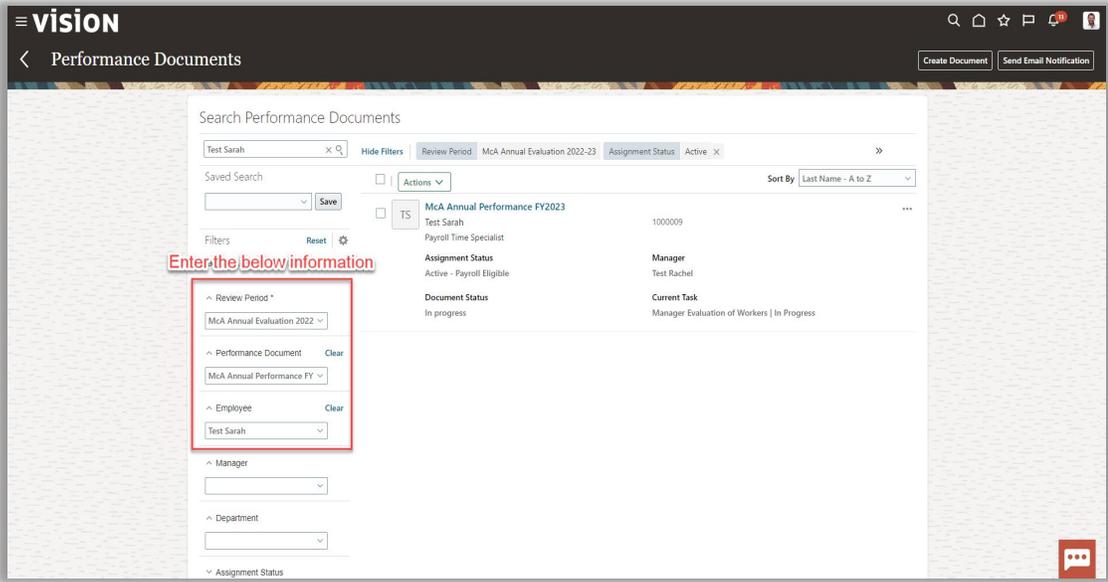
Next, click **Performance**



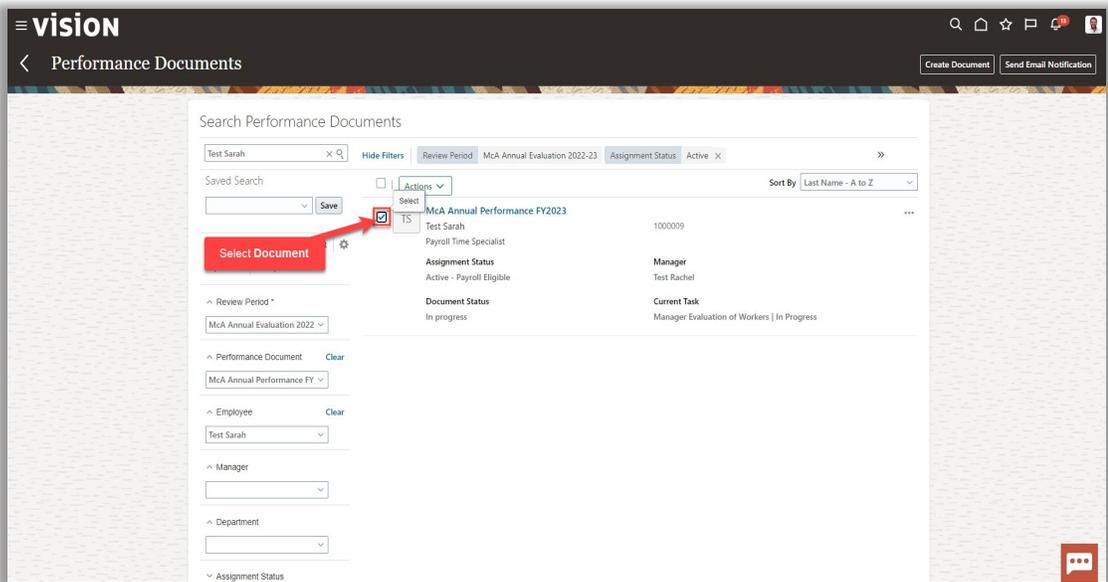
Click Performance Document



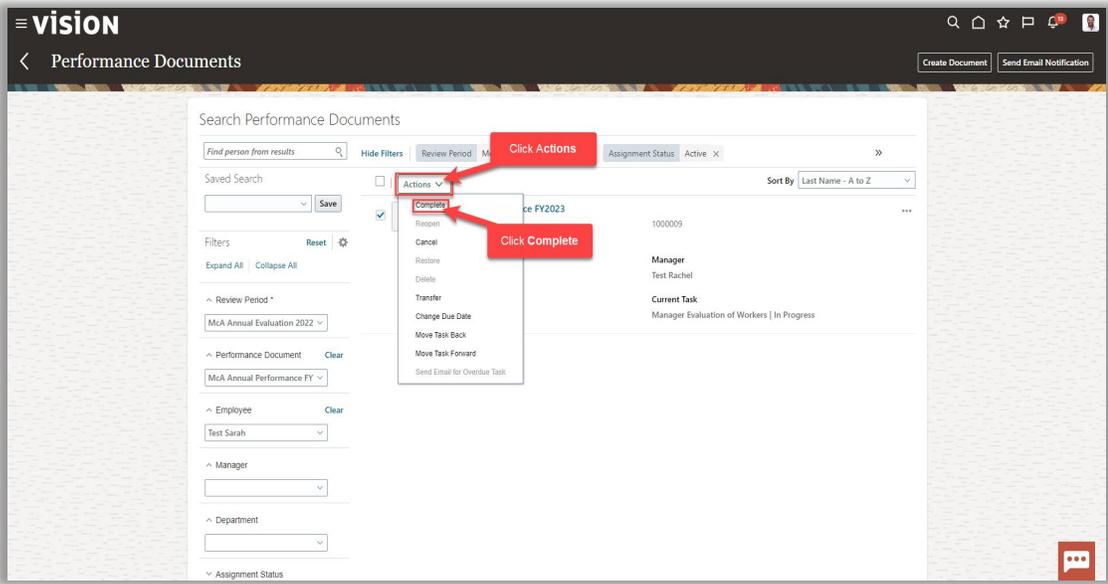
Search for the Performance Document by entering the Review Period, Performance Document, and Employee



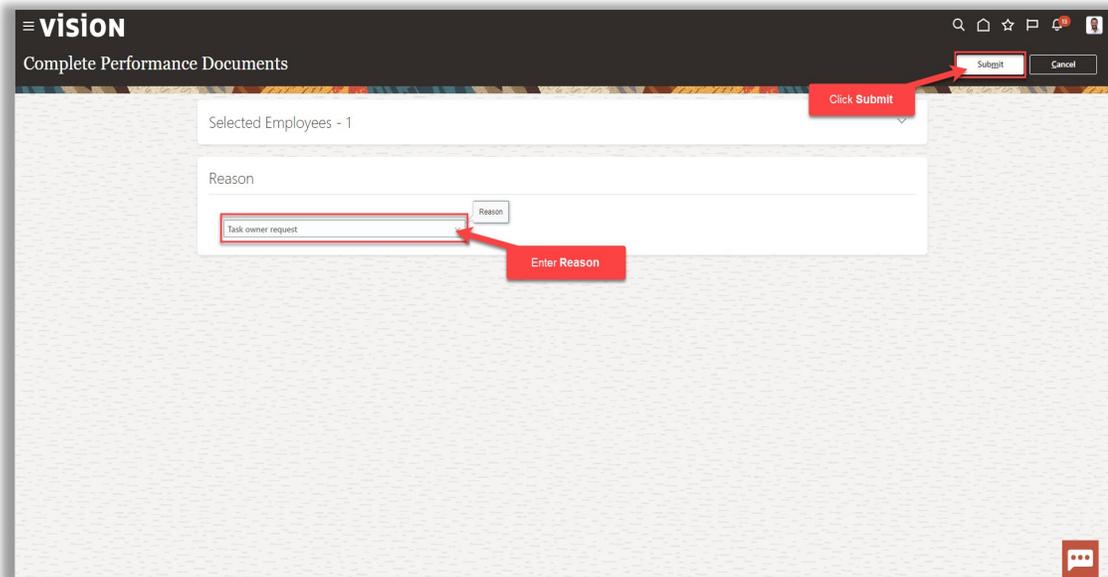
## Select the Performance Document



## Select Actions then Complete



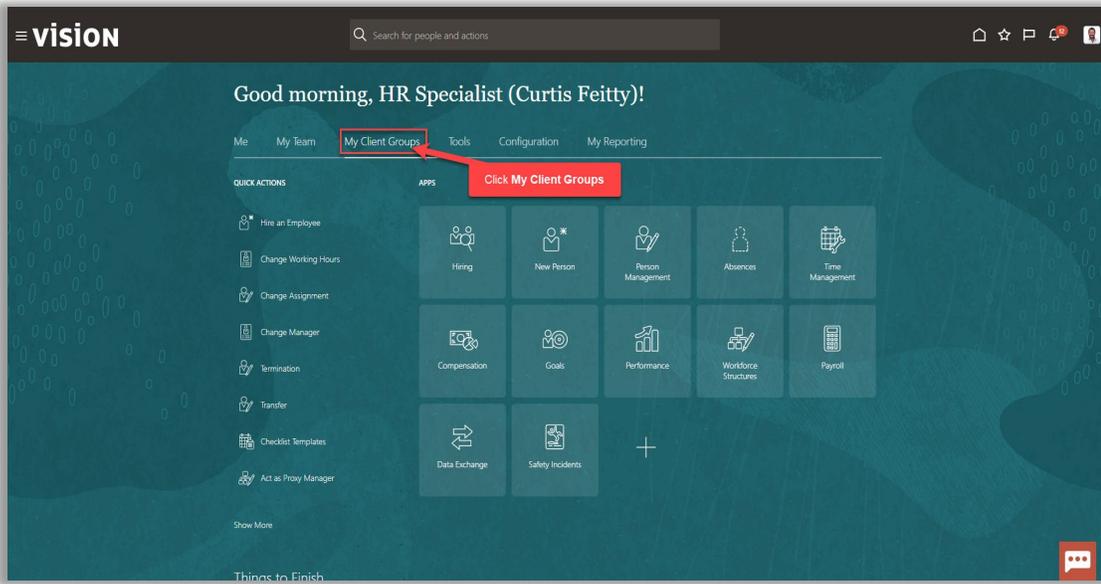
Enter the Reason then click **Submit**



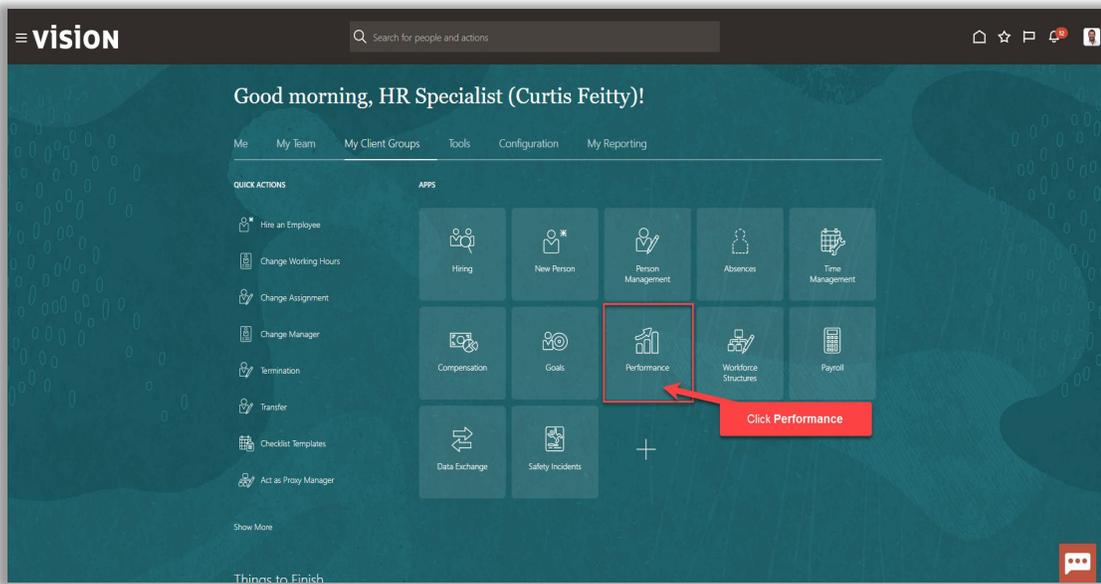
### Reopen Performance Documents

Navigation: Home>My Client Groups>Performance>Performance Document> Search and Select Document>Actions>Reopen>Enter Details>Submit

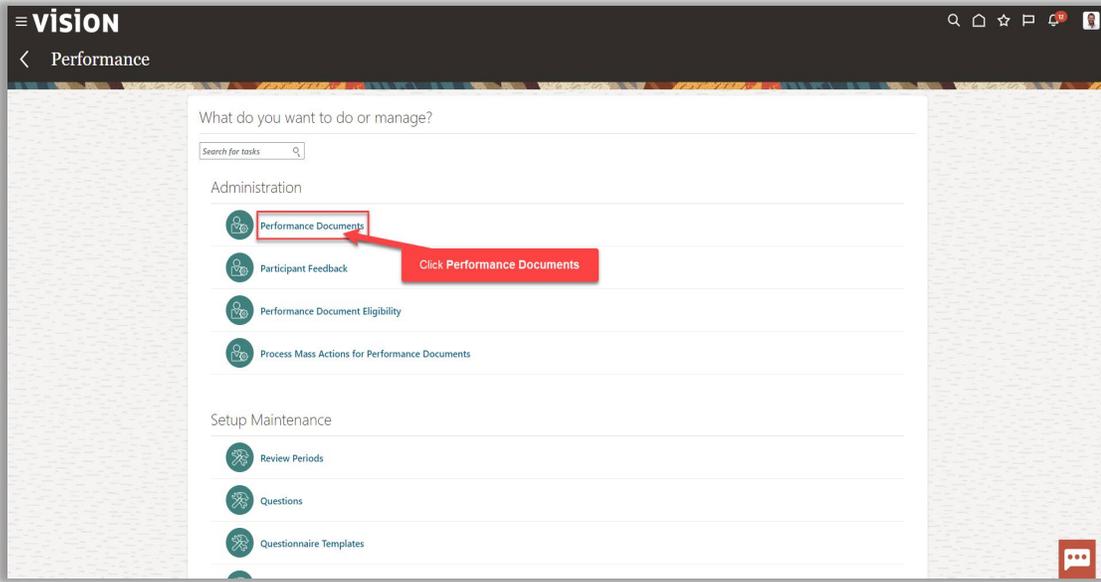
From the home screen, click **My Client Groups**



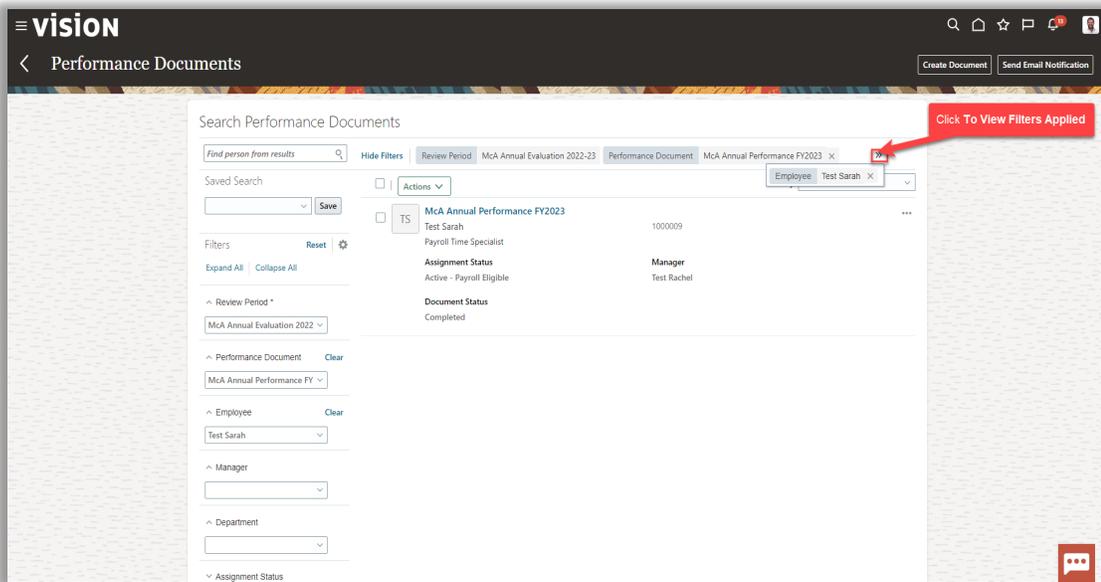
Next, click **Performance**



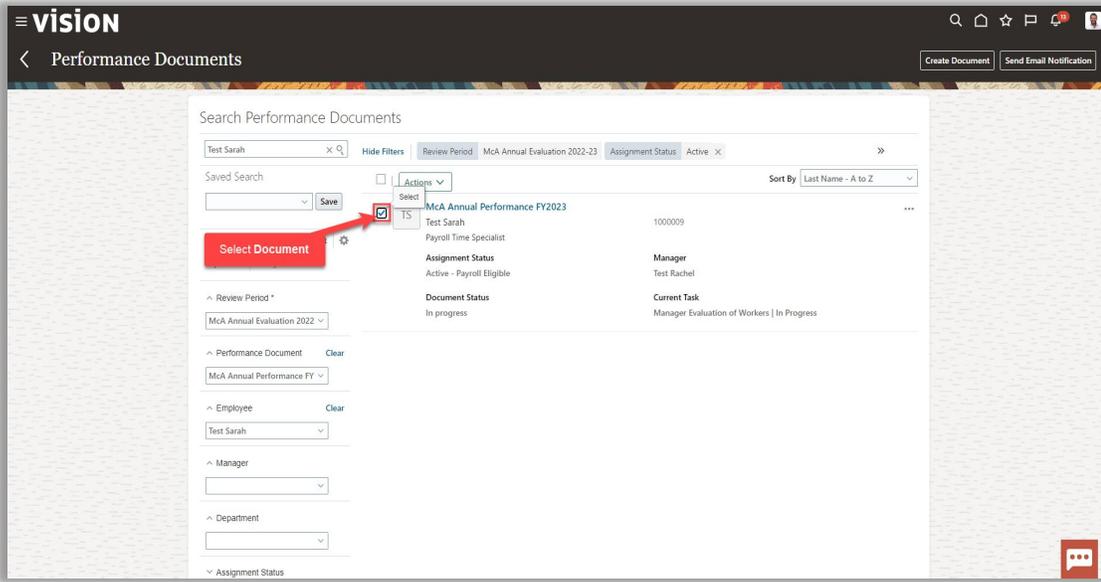
Click **Performance Document**



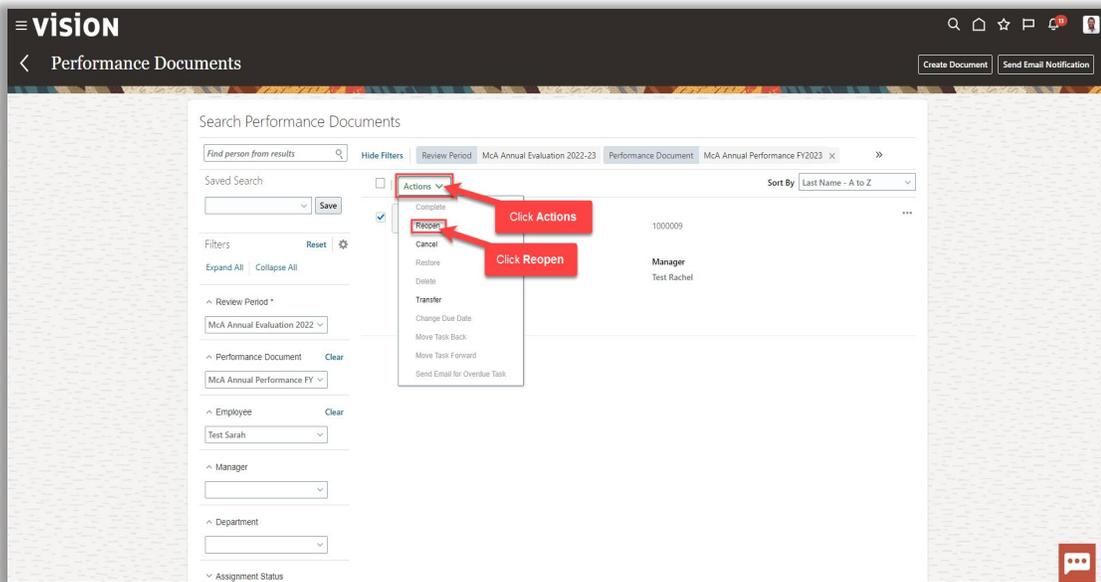
Search for the **Performance Document** by entering the **Review Period**, **Performance Document**, and **Employee**. Click the carrot to view the filters applied to the search. Remove all filters except Review Period, Performance Document, and **Employee** by clicking the **X**



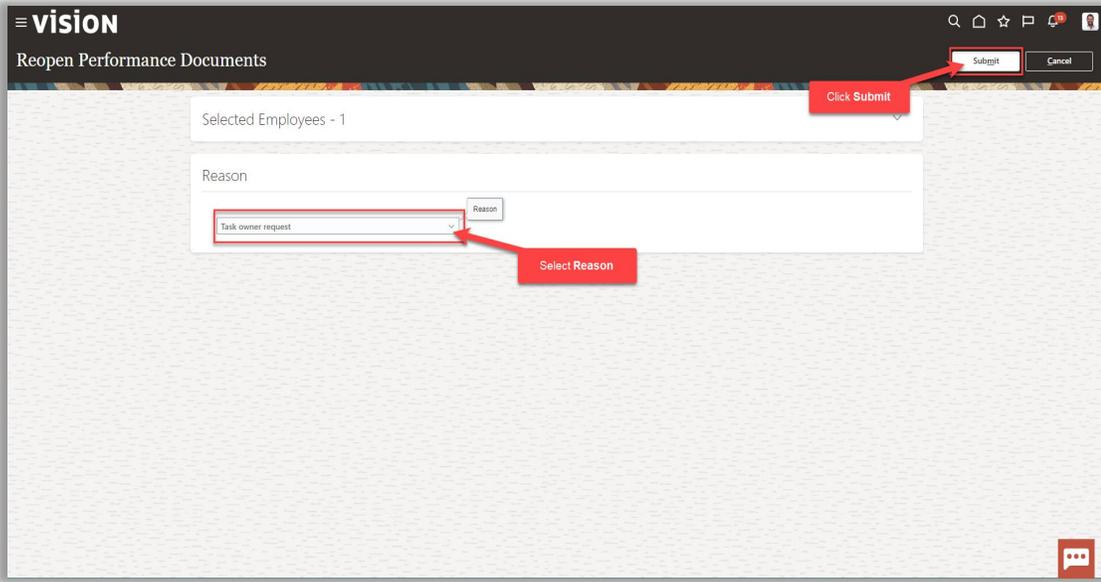
Select the **Performance Document**



### Select Actions then Reopen



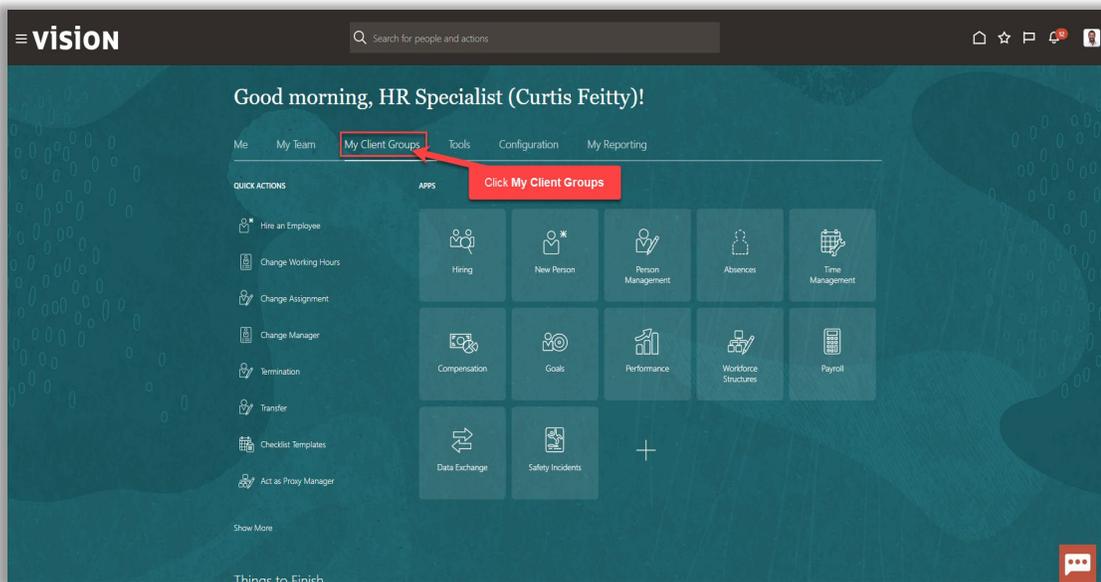
### Enter the Reason then click Submit



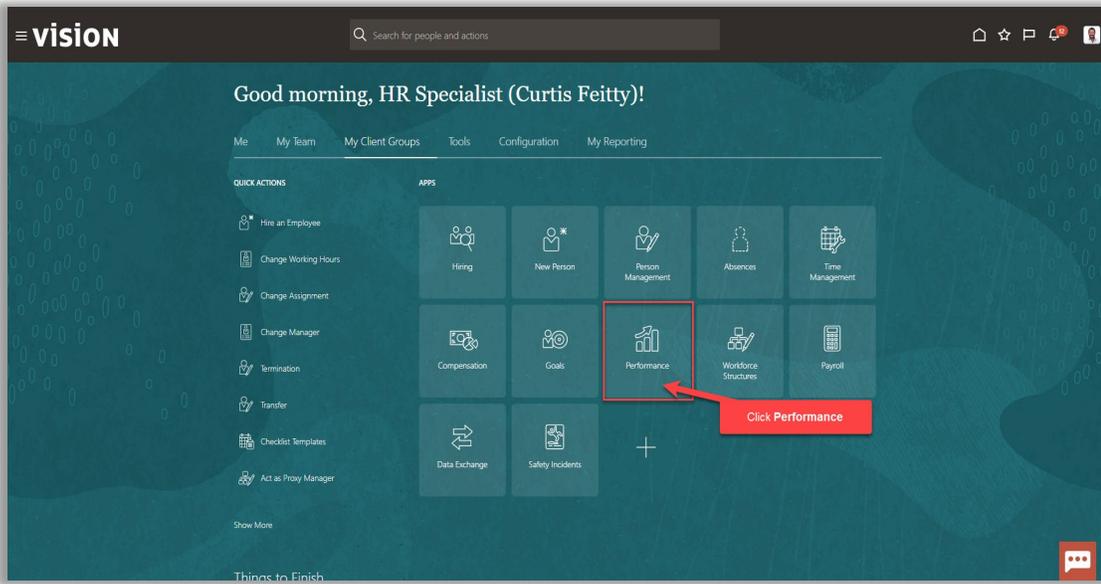
## Move Task Forward

Navigation: Home>My Client Groups>Performance>Performance Document>Search and Select Document>Actions>Move Task Forward>Enter Details>Submit

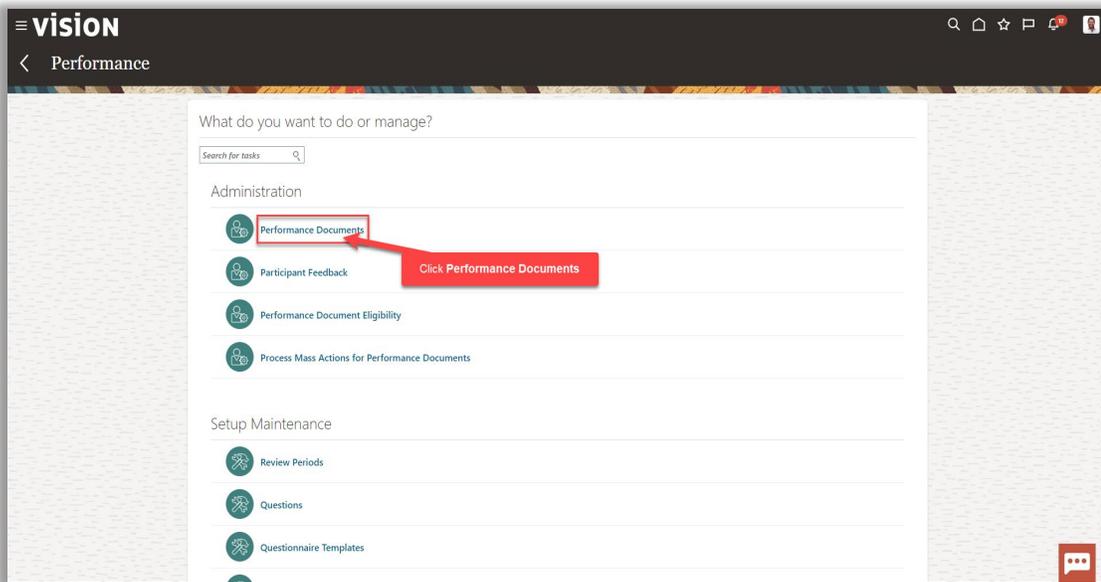
From the home screen, click **My Client Groups**



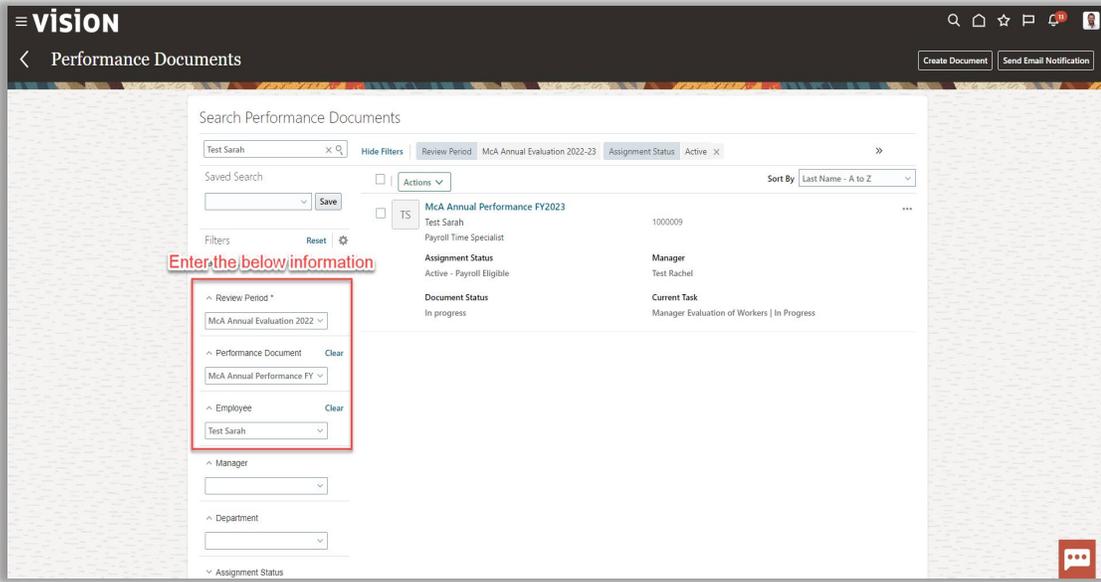
Next, click **Performance**



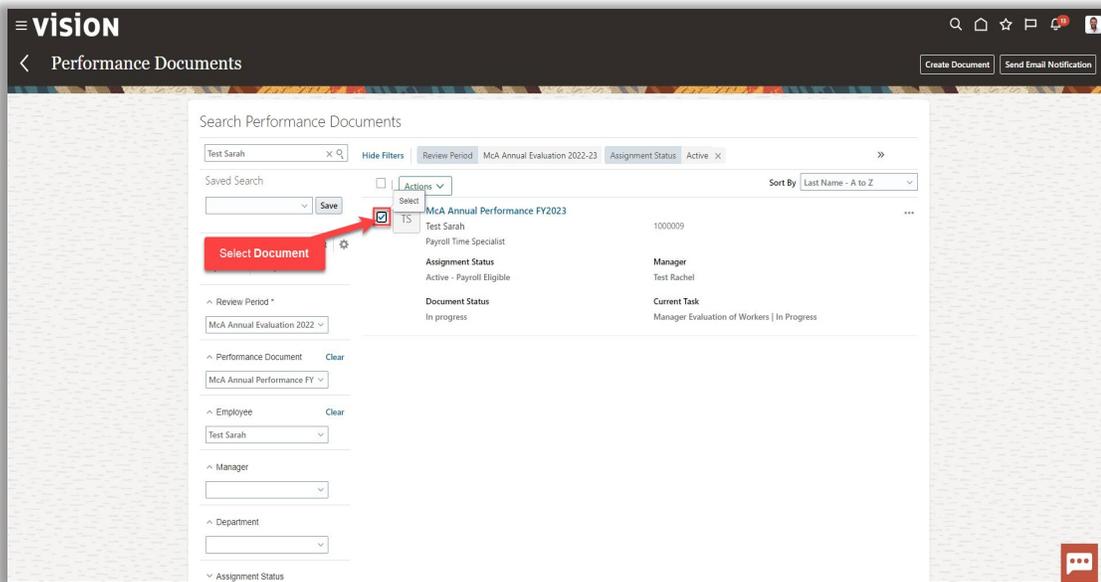
Click Performance Document



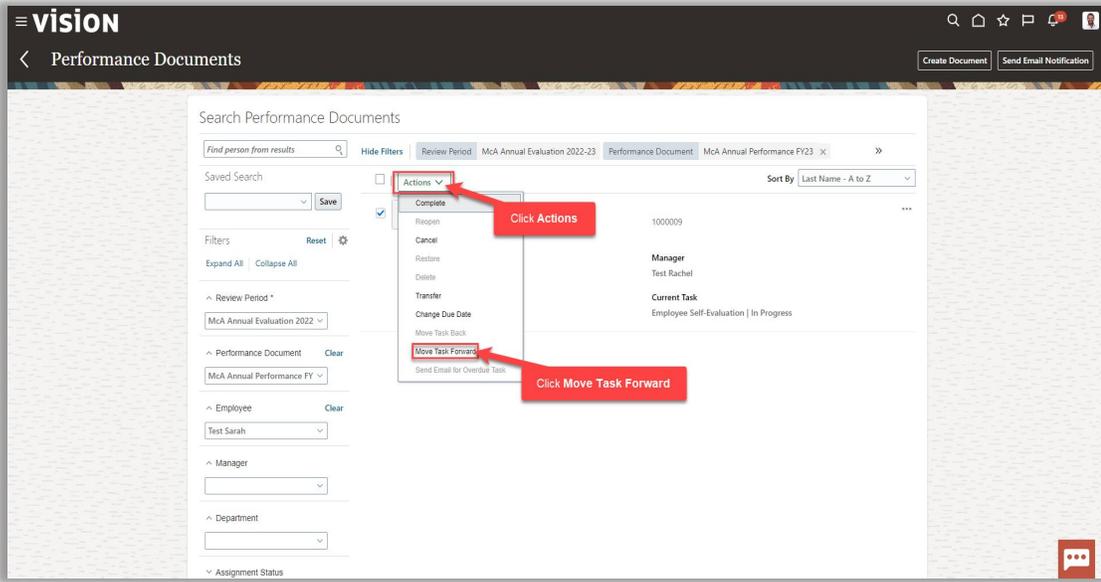
Search for the Performance Document by entering the Review Period, Performance Document, and Employee



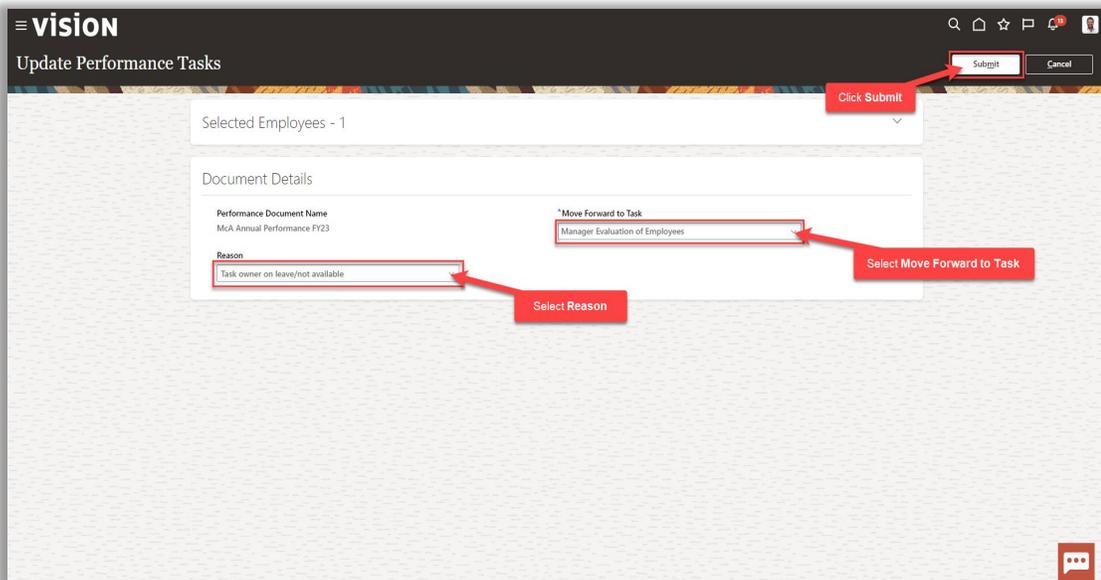
## Select the Performance Document



## Select Actions then Move Task Forward



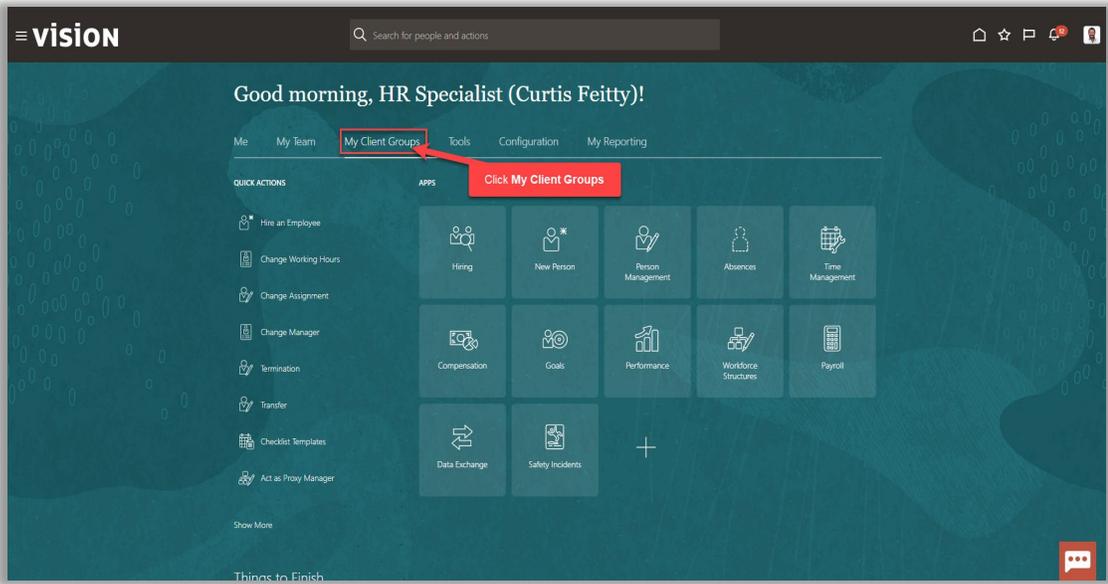
Enter Reason and Move Forward to Task. Click Submit



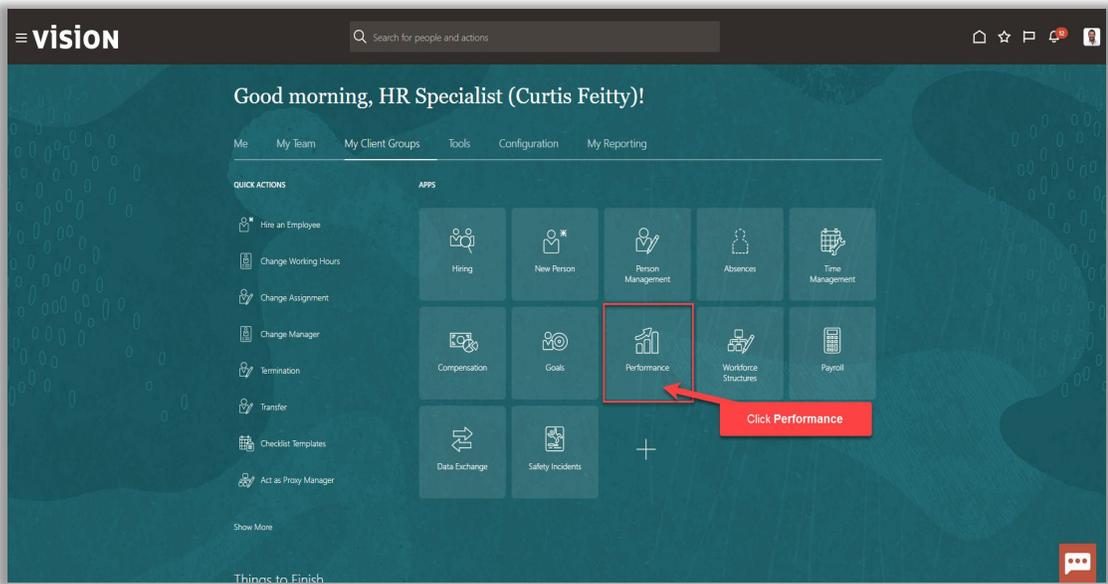
### Move Task Back

Navigation: Home>My Client Groups>Performance>Performance Document>Search and Select Document>Actions>Move Task Back>Enter Details>Submit

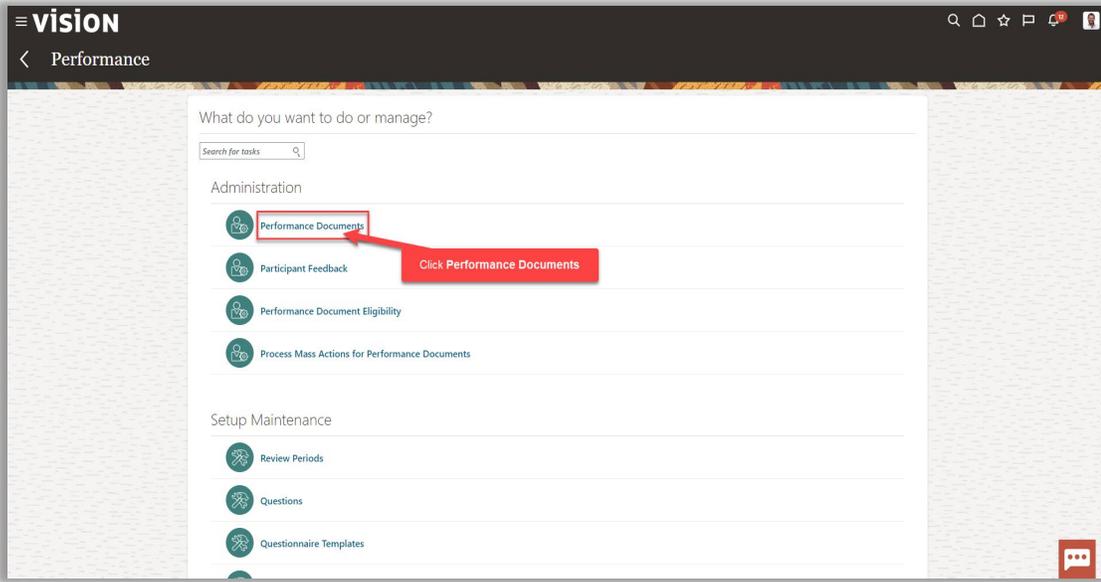
From the home screen, click **My Client Groups**



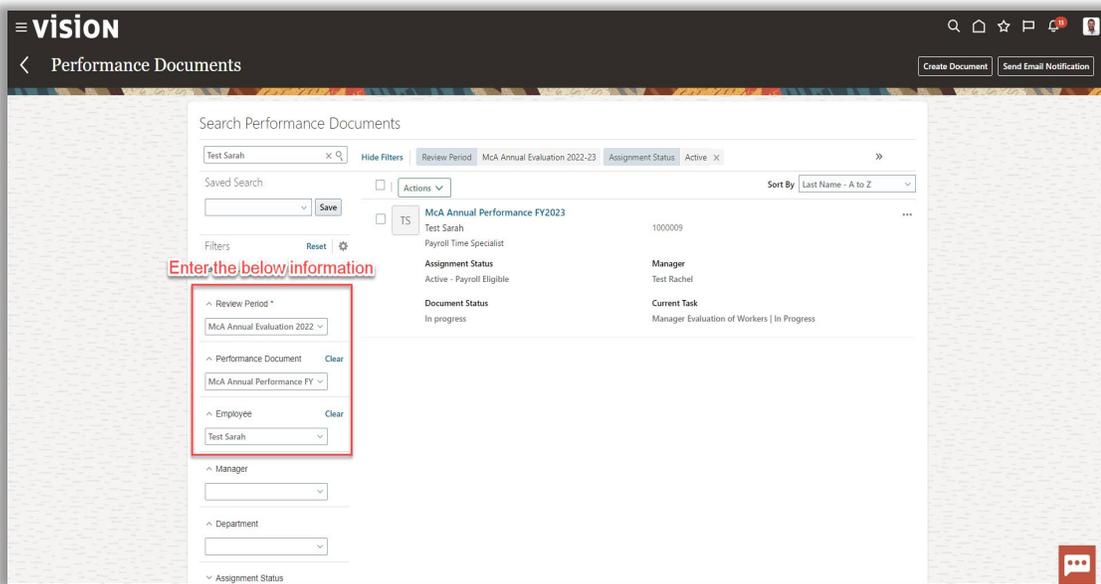
Next, click **Performance**



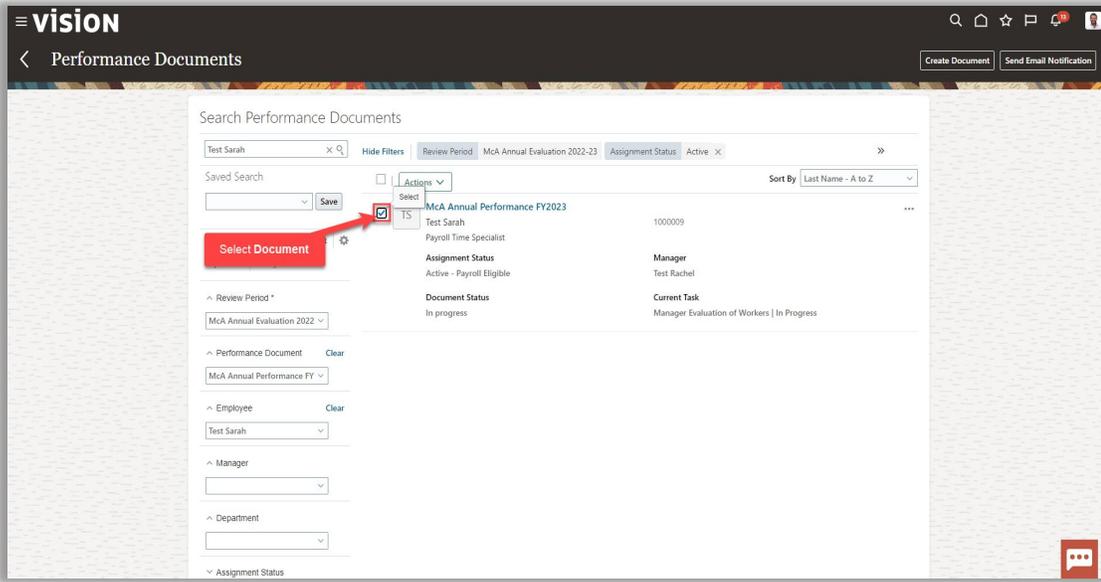
Click **Performance Document**



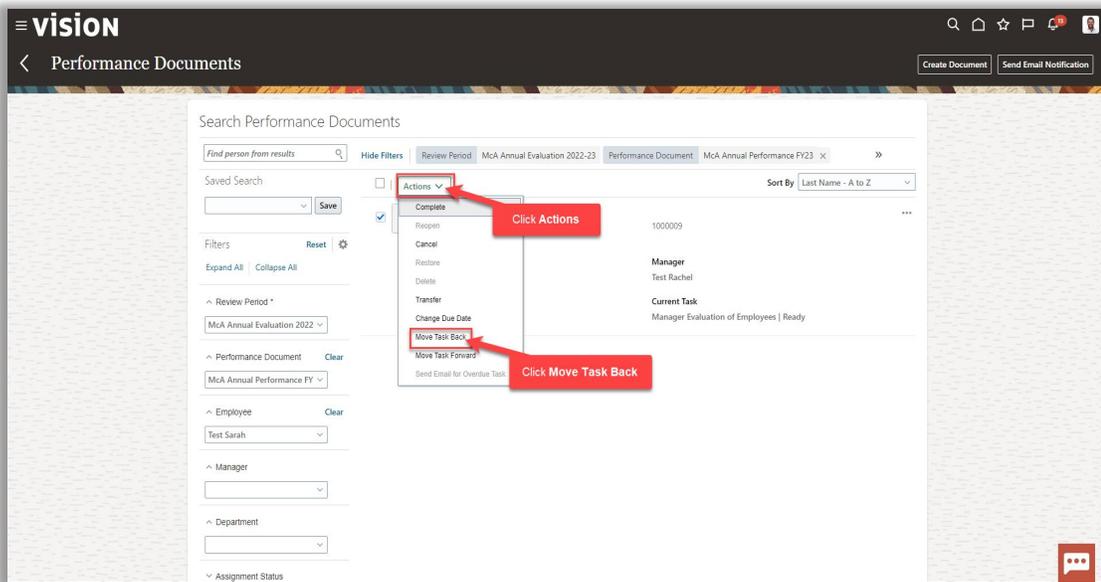
Search for the **Performance Document** by entering the **Review Period**, **Performance Document**, and **Employee**



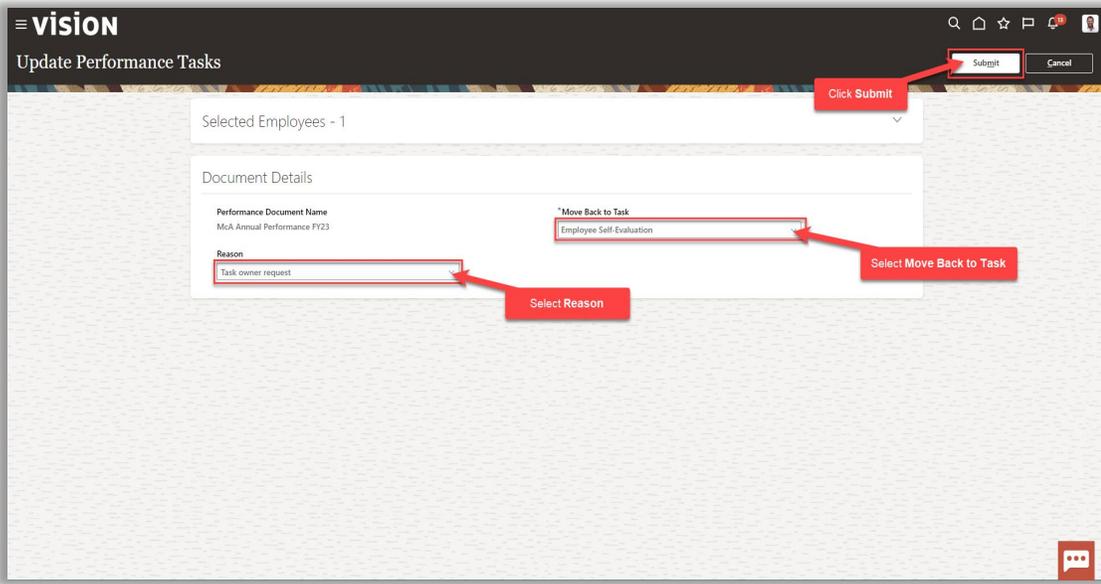
Select the **Performance Document**



Select Actions then Move Task Back



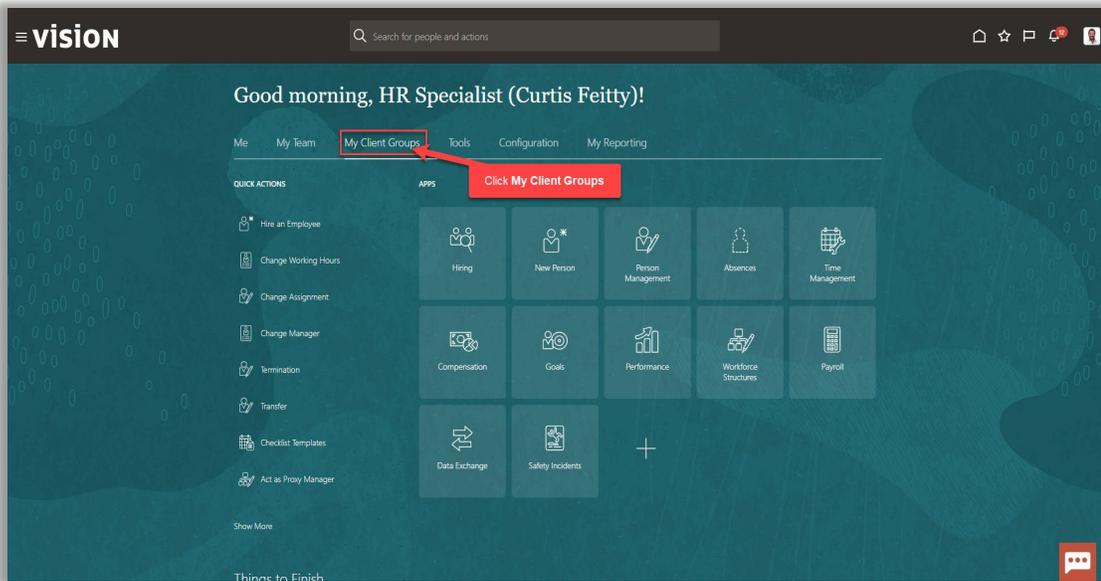
Enter Reason and Move Back to Task. Click Submit



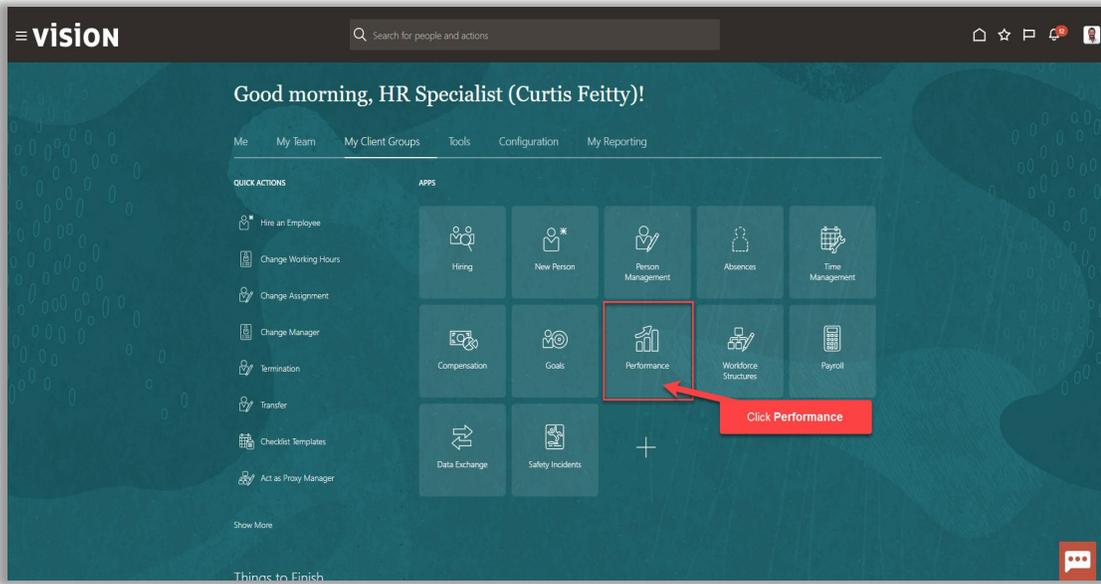
## Process Mass Actions for Performance Documents

Navigation: Home>My Client Groups>Performance>Process Mass Actions for Performance Documents>Add>Select Task>Enter Information>Submit

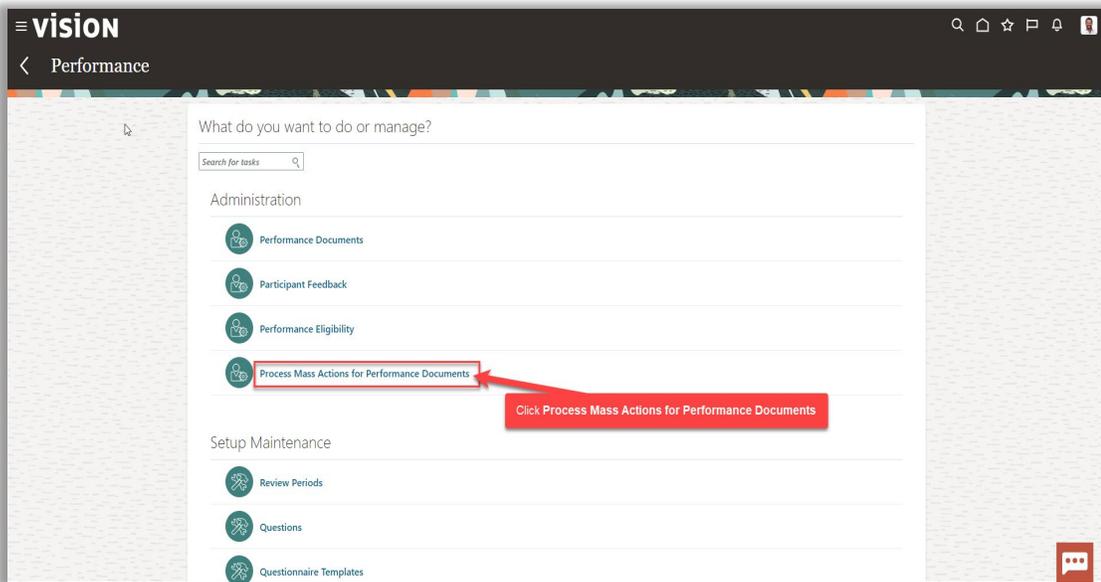
From the home screen, click **My Client Groups**



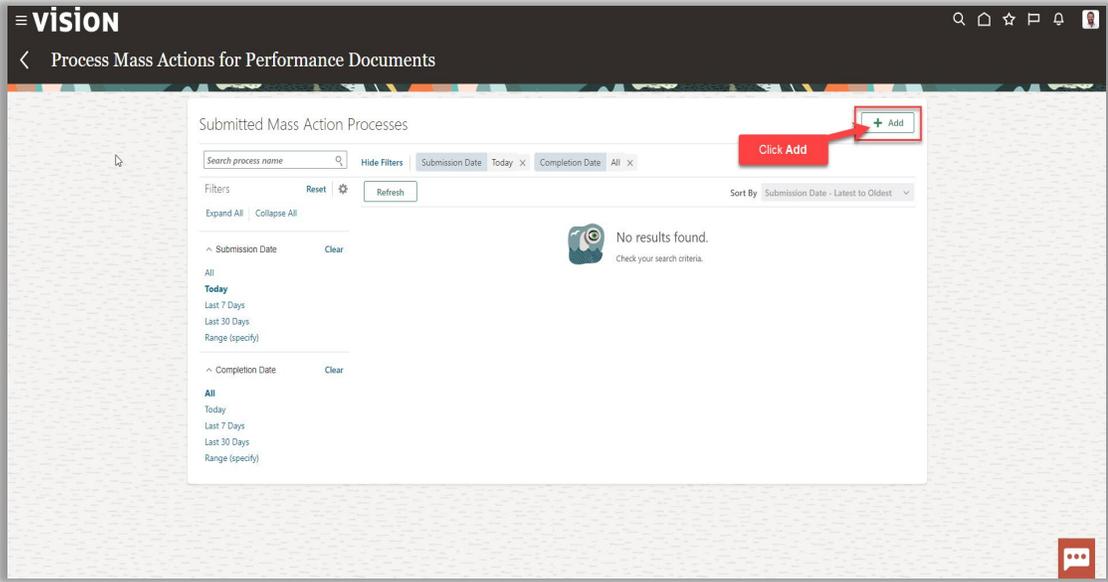
Next, click **Performance**



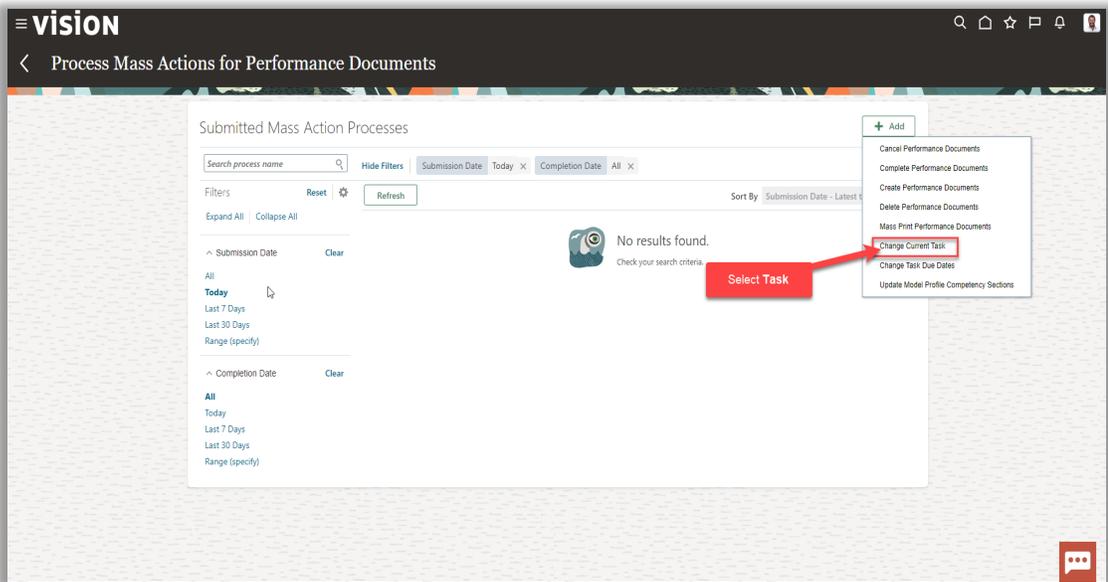
Click Process Mass Actions for Performance Documents



Click Add



Select the Task we wish to mass process



Enter the Details

**vision**  
Process Mass Change Current Task

Preview Submit Cancel

**Details** Enter the information below

<b>*Review Period</b> 2023 Annual Cycle	<b>Business Unit</b> Federal US Business Unit
<b>*Performance Document</b> 2023 Annual Evaluation	<b>Department</b> Select a value
<b>Current Task</b> Worker Self-Evaluation	<b>Manager</b> Select a value
<b>*New Current Task</b> Manager Evaluation of Workers	<b>Employee</b> Select a value
<b>Reason</b> Task owner request	<b>Assignment Status</b> Select a value

Click **Submit**

**vision**  
Process Mass Change Current Task

Preview Submit Cancel

**Details**

<b>*Review Period</b> 2023 Annual Cycle	<b>Business Unit</b> Federal US Business Unit
<b>*Performance Document</b> 2023 Annual Evaluation	<b>Department</b> Select a value
<b>Current Task</b> Worker Self-Evaluation	<b>Manager</b> Select a value
<b>*New Current Task</b> Manager Evaluation of Workers	<b>Employee</b> Select a value
<b>Reason</b> Task owner request	<b>Assignment Status</b> Select a value

Click Submit

Thank you for reviewing and using our guide; we hope you have found it helpful. If you have any questions on the content included in this guide, please contact our Training & Learning team at [learn@camptratech.com](mailto:learn@camptratech.com)

Version History	Revision Date	Author	Changes
Version 1.0		Megan Ketter	Initial Version