

Oracle Fusion HCM

Performance Management

SOAIS

Putting Customer First

Setting up Performance Management

The following 11 steps are required to complete Performance Management setup

1. *Manage performance roles*

- Defines Who of performance evaluation
- Create participants for performance process
- Delivered roles are Workers & Managers

2. *Manage eligibility profiles*

- Deciding who gets what evaluation based on job criteria or other things

3. *Manage process flow definitions*

- Which tasks going to be part of performance evaluation like Set Goals, Worker self evaluation, Manager evaluation, First/Second approvals etc.
- deciding what order those tasks are going to be done

Continued...

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4. *Manage sections for the process flow*

- Create a section for each task above in 3
- what areas the workers are going to be rated on
- Different section types available, such as Profile content (rate worker competencies), Goals, Questionnaire, Overall Summary, Worker final feedback, Manager final feedback

5. *Manage performance document type*

- Categorizes the types of performance documents used
- How many types of evaluation company has ie. Quarterly, annually , project etc.

6. *Manage questions*

7. *Manage questionnaire templates*

Continued...

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8. Manage questionnaires

- How you get additional feedback for people other than the worker & manager ie. Peers or PMs.
- Kind of mini survey

9. Manage performance templates

- Create a template based on earlier definitions steps 1 to 8
- Eg. Consultant Performance, Manager Performance

10. Manage target ratings distribution

- Compare desired and actual ratings distribution

11. Manage eligibility batch process

- Assign the performance evaluation based on the criteria that have been set up.
 - eg,. One setup criteria for HCM consultants, another for Technical consultants etc.
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Performance Management Considerations

1. How many performance templates need to be setup?
 2. How many types of evaluations are needed? On quarterly/annual basis or need to have project template as well etc. for setting up document types
 3. Are there variations in evaluations across your organization? Do you have different set up of criteria for different departments or like differences for HCM functional and technical consultants, so that different templates can be created
 4. What notifications or approvals are needed? Multiple level notification system, notification to go out at every step or only at the end
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Performance Management Implementation Scope

Configurable Items	Descriptions	Scope
Performance Roles	Who of performance evaluation. eg. Workers, managers, peers etc.	
Eligibility Profiles	deciding who gets what evaluation based on job criteria or other things	
Manage process flow	which tasks going to be part of performance evaluation and in what order	
Manage sections	which sections are going to be included and what areas the workers are going to be rated on	
Performance document type	How many types of evaluation company has ie. Quarterly, annually	
Questions		
Questionnaire templates		
Questionnaires	How you get additional feedback for people other than the worker & manager	
Performance templates	Include options above in one place	
Target ratings distribution	compare desired and actual ratings distribution	
Eligibility batch process	Assign the performance evaluation based on the criteria that were set up eg. One for HCM consultants, one for finance etc	