



## CSX Performance Release Notes March

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# Performance

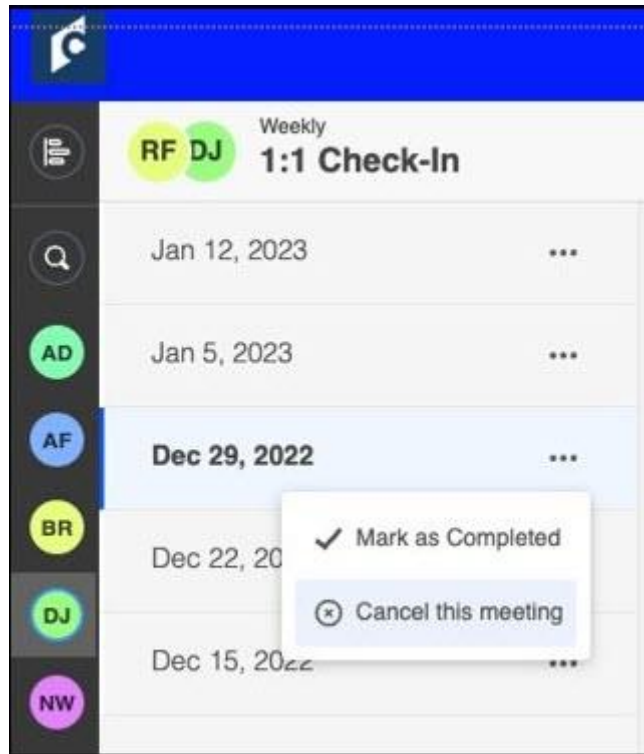
# Check-Ins Enhancements

## Check-Ins Meeting Statuses

Prior to this enhancement, administrators were only able to report on created Check-Ins or Check-Ins that have content.

With this enhancement, managers and employees can mark meetings complete or cancelled. This allows administrators to report on the use of Check-Ins in their organization.

**This enhancement is available in Stage on February 16th.**



On the meetings and topics page, users can select "Mark as Completed" or "Cancel this meeting". All meetings are open by default.

The following applies to meeting statuses:

- Only check-in meetings that have content can be marked as complete.
- Participants can edit the notes of a check-in meeting when a meeting is completed or cancelled.
- Users can view status details on the Modification History page.

### New Reporting Field

The following reporting field is now available:

FIELD NAME	FIELD DESCRIPTION	FIELD TYPE	SOLUTION/SUITE	ENTITY	SECTION (UI GROUP)
Meeting	Meeting Status indicates	String	Performance	Check-	Check-Ins

FIELD NAME	FIELD DESCRIPTION	FIELD TYPE	SOLUTION/SUITE	ENTITY	SECTION (UI GROUP)
Status	if a Check-In meeting is open (not completed), has been completed or cancelled.			Ins	

### New Email Tag

A new email tag [**Meeting.Status**] is added to the email digest. If configured, a user can see the status of their meeting, their recent meetings, and upcoming and missed meetings.

### How Does this Enhancement Benefit My Organization?

- Administrators can track the completion rate of check-ins in their organization to confirm conversations between an employee and manager.
- Managers and employees are accountable for regular check-in meetings.

### Implementation

This functionality is automatically enabled for all organizations using the Check-Ins module.

### Permissions

The following existing permissions apply to this functionality:

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Check-Ins - Create	<p>Grants ability for the user to create and update Check-Ins. The permission constraints determine with whom the user can create Check-In discussions. This permission can be constrained by OU, User's OU, User Self and Subordinates, User, User's Subordinates, User's Direct Reports, User's Self, User's Manager, User's Superiors, and Employee Relationship. Users with constraints in the "Check-Ins - Create" permission cannot create a new Check-In with anyone who is not part of the constraints, but can still view and update any Check-In in which they are a participant.</p> <p>This is an end user permission.</p> <p><b>Note:</b> <i>Permission constraint to Employee Relationship grants permission to dotted line or secondary managers to create Check-Ins with users</i></p>	Performance

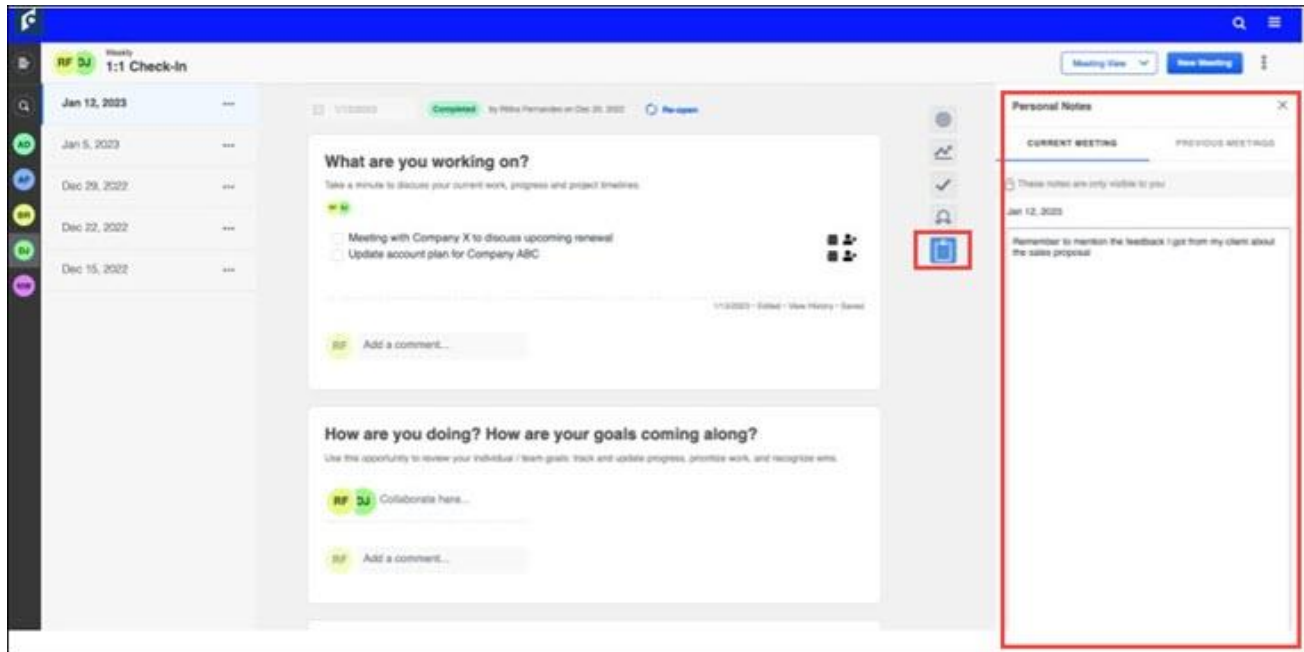
	<p><i>that report to them in the matrix structure. A constraint "Restricted to Employee Relationship: Detail Supervisor" means that the Detail Supervisor can create a Check-In with their indirect subordinate but the indirect subordinate cannot create a Check-In with their Detail Supervisor.</i></p>	
<p>Email Digest Administration - Manage</p>	<p>Grants ability to create, edit, view, and delete email digests. This permission can be constrained by OU, User's OU, User Self and Subordinates, and User. The permission constraints determine which email digests the administrator can edit and delete. This is an administrator permission.</p>	<p>Performance - Administration</p>

## Check-In Personal Notes

Prior to this enhancement, any notes made by a user on the meetings and topics page were visible to all participants in the meeting.

With this enhancement, users can create personal notes that are not visible to anyone except the writer of the note. This allows managers and users to create personal notes that they may want to refer to during the meeting or take personal notes during the meeting for future reference. Users can view or edit their previous notes at any time. The previous notes for the last three months are available by default.

**This enhancement is available in Stage on February 16th.**



To access the personal notes feature, from the meetings and topics page, select the notes icon. The Personal Notes flyout opens.

- **To create a personal note:** On the Current Meeting tab, type your note(s). The note is automatically saved. Notes are accessed on the Current Meeting tab only on the day it is created. After that, it displays on the Previous Meeting tab.
- **To edit a previous note:** Select the Previous Meetings tab. Select a date range to filter the notes. Click the appropriate note to edit it. Click **SAVE** when you are done editing.  
**Note:** For filtering, there is a range limit of 12 months.

## Considerations

- Personal Notes are not reportable in Reporting 2.0 at this time.
- Follow ups are not included in the rich text editor for personal notes.



## Implementation

This functionality is automatically enabled for all organizations using the Check-Ins module.

## Permissions

The following existing permissions apply to this functionality:

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Check-Ins - Create	<p>Grants ability for the user to create and update Check-Ins. The permission constraints determine with whom the user can create Check-In discussions. This permission can be constrained by OU, User's OU, User Self and Subordinates, User, User's Subordinates, User's Direct Reports, User's Self, User's Manager, User's Superiors, and Employee Relationship. Users with constraints in the "Check-Ins - Create" permission cannot create a new Check-In with anyone who is not part of the constraints, but can still view and update any Check-In in which they are a participant.</p> <p>This is an end user permission.</p> <p><b>Note:</b> <i>Permission constraint to Employee Relationship grants permission to dotted line or secondary managers to create Check-Ins with users that report to them in the matrix structure. A constraint "Restricted to Employee Relationship: Detail Supervisor" means that the Detail Supervisor can create a Check-In with their indirect subordinate but the indirect subordinate cannot create a Check-In with their Detail Supervisor.</i></p>	Performance

## Check-Ins Usability Enhancements

There are two new enhancements to improve the user experience and usability for Check-Ins users:

- Launch skills feedback requests and ratings from Check-Ins.
- Improved experience for administrators uploading guidance files to a template.

**This enhancement is available in Stage on February 16th.**

### Launch skills feedback requests and ratings from Check-Ins

With these enhancements, users can rate their interest in a skill and managers can rate an employee's proficiency for a specific skill.

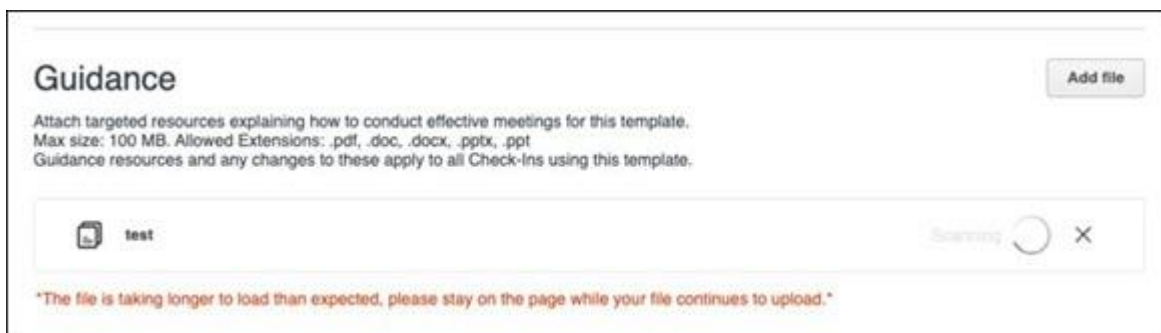
To access this functionality, from the Check-Ins meetings and topics page, select the Skills icon. The Skills Profile flyout opens.

- **To rate interest in a skill:** In the Skills You Want to Develop section, select a skill. From the drop-down, select **Rate My Interest**. On the self-rating window, click Start and answer the two questions. A user can view their interest ratings and proficiency ratings by opening the skills panel and clicking the skill they have rated. The user must click on **self** in the graph to view their proficiency and interest ratings as well as any comments related to that skill.
- **To rate an employee's proficiency:** In the Current Skills section, select a skill. From the drop-down, select a Rate Proficiency option. A modal appears that allows a manager to rate the employee's proficiency.
- **To request feedback:** From the Request Feedback section, complete the Request Feedback form and select **SAVE**. The recipient of the request can view the request in their Universal Profile on the Actions Tab.

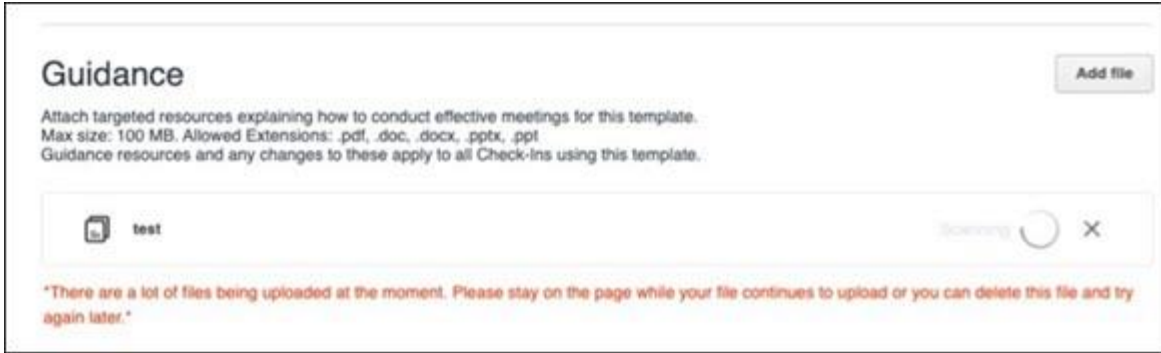
### Uploading Guidance Files

To provide information before uploading guidance files, the following new error messages will appear:

- If the file takes more than a minute to scan, the following message appears:



- If the file takes more than five minutes to scan, the following message appears:



## Implementation

This functionality is automatically enabled for all organizations using the Check-Ins module.

## Permissions

The following existing permissions apply to this functionality:

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Capabilities - Skills Profile - View	Grants ability to view an employee Skills Profile. Users who have this permission may view the Skills Profile for anyone in the organization. However, individual ratings have privacy settings that control visibility within the Skills Profile. This permission cannot be constrained. This is an end user permission.	Core Administration

## Reporting Fields - Check-Ins

With the March '23 Release, new fields have been introduced to the Check-Ins area of Reporting 2.0:

- Check-Ins fields have been added

With this enhancement, the following new field is added to the *Check-Ins* section of Reporting 2.0:

FIELD NAME	FIELD DESCRIPTION	FIELD TYPE
Check-In Meeting Status	This field displays the status of a check-in meeting.	Text

### Implementation

Upon implementation, this enhancement is available for all portals with Reporting 2.0.

### Permissions

For more information about Reporting 2.0 permissions, see the following:

- **Permissions in Reporting 2.0** - This provides detailed information about Reporting 2.0 permissions.
- **Permissions List** - This provides the list of permissions and their relationships so that you know which permissions users need to have to create and view reports.

# Competency Enhancements

## Competency Experience Improvements

Prior to this enhancement, some actions related to in-progress observation checklists and competency assessment tasks could be taken safely without causing issues for users.

With this enhancement, additional actions are now available for in-progress observation checklists and assessments.

### Modify "Show Assessee/Manager Results from" for In-progress Competency Assessment Tasks

Administrators can now modify the **Show Assessee/Manager Results from** settings for in-progress competency assessment tasks.

To access Competency Task Administration, go to [ADMIN > TOOLS > PERFORMANCE MANAGEMENT > COMPETENCY ASSESSMENT TASKS](#).

Competency Preference

This task is currently in progress. Limited changes can be made for this task.

1. General 2. Competency Model 3. Competency Preference 4. Assessment Result 5. Availability 6. Confirm

Preferences - Competency Assessment


<p><b>Assessment Recipients:</b></p> <p><b>Show Assessee/Manager results from:</b></p> <p><b>Comments:</b></p> <p><b>Review Allowed:</b></p> <p><b>Save Progress:</b></p> <p><b>Compare:</b></p> <p><b>Manager Overwrite Average Scores:</b></p> <p><b>Target Scores:</b></p> <p><b>Freeform Questions:</b></p> <p><b>Development Plan:</b></p>	<p><b>Relationship</b></p> <p>Add Relationship</p> <p>Self 30</p> <p>Manager 30</p> <p>Peer Group 22 40</p> <p><input type="radio"/> Include all approved assessors <input type="radio"/> Allow <span>Self</span> to select assessors</p> <p><b>Relationship</b></p> <p><input checked="" type="checkbox"/> Self</p> <p><input checked="" type="checkbox"/> Manager</p> <p><input checked="" type="checkbox"/> Peer Group 22</p> <p><input checked="" type="checkbox"/> Allow assessors to enter comments for each item</p> <p><input checked="" type="checkbox"/> Allow assessors to enter comments for each competency</p> <p><b>Comment Visibility</b></p> <p><input type="radio"/> By Minimum Respondents <input type="radio"/> By Date</p> <p><b>If a group does not meet minimum # of respondents:</b></p> <p><input type="checkbox"/> Hide Group comments from the Assessee/Manager.</p> <p><input type="checkbox"/> Display comments from all relationship groups anonymously to the Assessee/Manager.</p> <p><input checked="" type="checkbox"/> Outside of the assessment process, allow users to review assessments they have completed</p> <p><input checked="" type="checkbox"/> Allow the assessor to save any progress and return to the assessment at a later point</p> <p><input checked="" type="checkbox"/> Allow a user to compare their assessment scores with other competency models</p> <p><input checked="" type="checkbox"/> Allow Manager the ability to overwrite the average score for this task</p> <p><input checked="" type="checkbox"/> Display target scores for each competency to the user on the Competency Summary page.</p> <p><input checked="" type="checkbox"/> Include freeform questions at the end of the assessment. question 1</p> <p><input type="checkbox"/> A development plan will not be created from this assessment.</p> <p><input type="checkbox"/> Auto create development plan based on recommended development actions</p> <p><input type="checkbox"/> Allow users to select development actions to add to their development plan.</p>	<p><b>Weight (%)</b></p> <p>30</p> <p>30</p> <p>40</p> <p>1</p>
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« Back Done Next »

### Delete Certain LO-Based Observation Checklists

When viewing the details of a LO-based (Learning Object) observation checklist, administrators can now delete an assignment for a user when the following criteria is met:

- The LO checklist is not in a Completed status
- The LO checklist was assigned through a curriculum and it is no longer part of the curriculum structure for the user.
- The LO checklist was assigned through a certification and it is no longer part of the certification framework.

To view the details of an observation checklist, go to [ADMIN > TOOLS > PERFORMANCE MANAGEMENT > OBSERVATION CHECKLISTS](#). Then, click the View Details  icon in the Options column next to the checklist.

## Implementation

This functionality is automatically enabled for all organizations using competencies and LO-based observation checklists.

## Permissions

The following existing permissions apply to this functionality:

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Competency Assessment Task Administration	Grants ability to create/assign competency assessment tasks and manage activity within those tasks. This permission can be constrained by OU, User's OU, User Self and Subordinates, and User. This is an administrator permission.	Performance - Administration
Observation Checklist Admin - Manage	Grants access to create and edit Observation Checklists, as well as view progress of users assigned to a given checklist and/or remove users from a checklist. This permission can be constrained by OU and User's OU. This is an administrator permission.	Performance - Administration
Observation Checklist Admin - View	Grants access to view observation checklists. This permission also enables user to see progress of all users assigned to a given checklist. This is an administrator permission.	Performance - Administration

## Reporting Fields - Competencies

Prior to this enhancement, the name of the Reporting 2.0 field “Competency Item Assessor ID” did not describe the output value correctly.

This enhancement renames the “Competency Item Assessor ID” field to “Competency Item Anonymized Assessment ID.” The revised field name more clearly describes the value included in the output.

## Considerations

This change in the field name impacts existing reports.

## Implementation

Upon release, this enhancement is available for all portals with Reporting 2.0.

## Permissions

For more information about Reporting 2.0 permissions, see the following:

- **Permissions in Reporting 2.0** - This provides detailed information about Reporting 2.0 permissions.
- **Permissions List** - This provides the list of permissions and their relationships so that you know which permissions users need to have to create and view reports.



# Goals Enhancement

## Reporting Fields - Goals

With the March '23 Release, new fields have been introduced to the Goals area of Reporting 2.0:

- Goals Targets > Targets fields have been added
- Goals Tasks > Tasks fields have been added

### Targets

The following new fields have been added to the *Goals Targets > Targets* section of Reporting 2.0:

FIELD NAME	FIELD DESCRIPTION	FIELD TYPE
Target Status	This field displays the current status of the target.	Text

### Tasks

The following new fields have been added to the *Goals Tasks > Tasks* section of Reporting 2.0:

FIELD NAME	FIELD DESCRIPTION	FIELD TYPE
Task Status	This field displays the current status of the task.	Text

## Implementation

Upon release, this enhancement is available for all portals with Reporting 2.0.

## Permissions

For more information about Reporting 2.0 permissions, see the following:

- **Permissions in Reporting 2.0** - This provides detailed information about Reporting 2.0 permissions.
- **Permissions List** - This provides the list of permissions and their relationships so that you know which permissions users need to have to create and view reports.

# Performance Reviews Enhancements

## Review Task Central (Early Adopter)

With this enhancement, the new Review Task Central provides reviewers an easy way to view, submit, and calibrate all their assigned steps in one location.

Additionally, a new upgraded, intuitive user experience provides clarity on what performance tasks are due and where to find them.

Once an administrator enables this feature, users can use Task Central to:

- Filter review status
- Search for reviewees by name
- View all previous off-cycle tasks

To enable this feature, administrators go to [ADMIN > TOOLS > PERFORMANCE MANAGEMENT > TASKS](#) and select the **ACTIVATE TASK CENTRAL** button.

Once enabled, all the following changes and features apply.

### Review Actions Menu

Selecting **REVIEW ACTIONS MENU** opens the Review Actions menu. This menu:

- Allows users to navigate between assigned review steps.
- Highlights the step the reviewer is currently working on.
- Displays step titles that are displayed in the Performance Review Workflow.
- Displays the Bulk Actions option, if enabled.
- Consolidates links to performance reviews. If a manager has 20 direct reports, they will see only one link that opens to all 20 reviews.

### Status Changes

All performance tasks that use Task Central now show new status as follows:

- Open: There are actionable steps to complete.
- Closed: There is no current action that can be taken on that review.

This change applies to the Universal Profile Actions, Scheduled Tasks, Action Items, and Performance Review Summary pages.

**Note:** The filters on the Performance Review Summary Page will be mapped to the new open and closed statuses.

### Due Date Changes

The following due date changes now apply:

- The due date associated with the task central link will represent a consolidated due date. This applies to the due date field on the Universal Profile - Actions, Performance Review Summary, Scheduled Tasks, and Actions items pages.
- If there is an action to complete on the task, and the status is open, the due date shows the earliest due date in the step.

The due date for the review step is also visible in the section header.

### **Reviewee View**

A new Review Actions Menu allows users to:

- Navigate between the review step they are currently on and any other steps they are assigned.
- Access bulk actions, if enabled.

### **Reviewee Menu**

Reviewers can:

- Move between reviewees or review sections.
- View when a review is completed, in progress, or past due.
- View the due date for each review.
- View all the reviews assigned for that step in the left-hand navigation bar.

### **Statuses and Tags**

The reviewee menu now displays three status icons:

- Completed: Green check mark icon
- Past due: Red warning sign icon
- In progress: Blue dot icon

Tags appear above reviewee names to identify when a step is re-opened or if the reviewer is serving as a co-planner for that reviewee.

## Off-cycle Tasks

The review view applies to Off-cycle tasks as follows:

- The off-cycle task shows each occurrence of that task in the reviewer menu.
- The Off-cycle task title is visible in the reviewee header.
- Reviewees can filter by step status or off-cycle task name.
- The Off-cycle task name displays below the reviewee name.
- A reviewer will see all reviews assigned for that step in the left navigation bar.

## Buttons and Navigation

Task Central button names and navigation on the review task changed to the following:

- **SAVE FOR LATER** button: Save and exit the review.
- **NEXT** button: Save and move to the next section.
- **PREVIOUS** button: Save and move to the previous section.
- **X** in top right corner of screen: Save and exit.

When a user navigates away from a task in Task Central, that task is automatically saved.

## REVIEW.LINK email tag and Single Sign On (SSO)

If Review Task Central is enabled, the REVIEW.LINK email tag in Step Assigned and Step Due emails allows the use of an SSO deep link, if SSO is enabled in the portal.

**Note:** The REVIEW.LINK email tag only works with Task Central for step due and step assigned emails.

## Considerations

- Task Administration: Review Summary
  - The Confirmation page is not available after Review Task Central is enabled.
  - Task Central uses aggregated links to access review tasks, so the tags used in Task List Names will not render. Instead, use a generic name, such as “2022 Manager Review”.
- During the early adopter period, Review Task Central does not support the following:
  - Discuss or decline review functionality for off-cycle tasks.
  - Review previews.
- During the early adopter period, only the following links are available under the options menu in the review:
  - Add co-planner
  - Attachments
  - Employee details
  - Print review
- Left to right languages are not supporting during the Early Adopter phase.
- Review Task Central only supports review step assigned and step due emails.
- Tags in Task Administration cannot be used for Task Central/

## Implementation

- Self-Activation. Prior to the April 14 patch, Review Task Central can be activated in the stage environment via the “Activate Review Task Central” button on the Performance Review Task Administration screen. If a stage portal had previously activated Review Task Central, it will remain active in those portals – they will not have to self-activate again. Review Task Central is not available in production and pilot environments until the April 14 patch.
- With the April 14 patch, Review Task Central can be enabled using a new Feature Activation page available via the Admin > Tools > Performance Management navigation path. The button to activate Review Task Central will be available in the new Feature Activation page. A new permission will be added to the System Administrator role to control access to this page. Stage portals that had previously enabled Review Task Central will not have to re-enable it again – it will remain active if previously enabled in stage.

Once enabled, Review Task Central cannot be disabled. Once enabled, all tasks created post-enablement will use the new Review Task Central user interface (UI). Tasks that are using the new Review Task Central UI will have a green check mark next to the name of the task.

## Permissions

The following existing permissions apply to this functionality:

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Performance Review Task - Manage	Grants ability to assign performance review tasks and manage activity within those tasks. This permission works in conjunction with the Admin Visibility settings for the performance review task. Administrators who have this permission and are within the Admin Visibility settings can view the task, edit the task, add users, and view the task details. However, the admin cannot edit the Admin Visibility settings for the task. This permission can be constrained by OU, User's OU, User Self and Subordinates, and User. The constraints on this permission control which users can be added to the task.	Performance - Administration
Performance Review Task Administration	Grants ability to create/assign performance review tasks and manage activity within those tasks. This permission also gives the ability to enable and view co-planners for a task from the administration pages.	Performance - Administration

This permission can be constrained by OU, User's OU, User Self and Subordinates, and User.



## Bulk Reopen Performance Review Steps (Early Adopter)

Bulk reopen is targeted to be available in production and pilot environments, along with Review Task Central, in the April 14 patch.

Prior to this enhancement, a reviewer was only able to reopen a review step for one reviewee at a time and comments about why someone is reopening are only visible in the step reopened email.

With this enhancement, a reviewer can reopen a review step for one or more reviewees at the same time and provide a reason for reopening the step. **Note:** *Only one step can be opened at a time.* Additionally, comments about why someone is reopening are visible in Review Task Central.

To enable this feature, administrators can go to [PERFORMANCE REVIEW -TASK ADMINISTRATION](#), select the Review Workflow tab, then check the **Allow the Reopener (Manager, Indirect Manager, and any Custom Relationships) to reopen steps** box. This allows the Bulk Actions screen to appear on Task Central.

Once enabled, on the Bulk Actions screen:

1. Select the Reopen tab.
2. Select a step or search for a step and select it.
3. Click the check-boxes for one or more users.
4. Click the **REOPEN STEPS** button. A Reopen Step window opens.
5. In the **Comment for Reviewer** box, enter the reason for reopening this step.
6. Click the **REOPEN STEP** button. The reopen information is displayed in the reopen table, including the comment. **Note:** *During processing, the reviewer cannot navigate away from the page.*

Once processing is done, a success message, a partial success message, or a failed message appears.

The step is reopened and the comment is displayed on Task Central to the appropriate assignees.

### How Does this Enhancement Benefit My Organization?

- Reviewers can reopen a review step for multiple reviewees at once, which saves time during the busy review season.
- Assignees can view the reopen reason directly on Task Central page to quickly rectify the issue.

### Considerations

- Bulk reopen functionality is only available to customers who enable Task Central.
- Bulk reopen supports 1,000 users per bulk submit action.

### Implementation

This functionality is automatically enabled for all Task central EA customers.

## Skills in Performance Reviews (Early Adopter)

Skills in performance reviews is targeted to be available in production and pilot environments, along with Review Task Central, in the April 14 patch.

Prior to this enhancement, during a performance review, managers nor employees had access to the employee's skills or skills to develop to facilitate a productive development conversation.

With this enhancement, a new Skills Review section is added to Performance Reviews. The Skills Review section:

- Integrates a user's skills profile into performance reviews and updates the skills profile as part of a performance review task.
- Allows a user's skill proficiency to be rated from within a review.
- Allows manager/user to add custom questions to the Skills Review section.

Administrators can enable this feature by going to [ADMIN > TOOLS > PERFORMANCE MANAGEMENT > FORM SECTIONS](#). The process is as follows:

1. Click the **Create Review Section** link.
2. From the **Type** drop-down, select **Skills Assessment**. A **QUESTIONS** button and a **ADD SKILL COMPONENT** button appear.

Administrators can add custom text or rating scale questions to a skills section and determine what order to organize the Skills Components and Custom Questions.

**Note:** Review Task Central must be enabled to use Skill Assessment.

Once enabled, the Skills Assessment section can be assigned to Self, Manager, a Custom Relationship, or Peer. Additionally:

- Reviewees can provide context for skills development over the review period, update their declared skills and proficiencies, identify areas of interest for further growth, and explore related learning.
- Reviewers can view a reviewee's skills profile, rate their proficiency, provide context or comments around skill development, and explore related learning.

Skills and proficiency updates made in the skills review automatically update in the user's skills profile.

## How Does this Enhancement Benefit My Organization?

With this enhancement, during performance reviews:

- Managers can easily access to the employee's skills to discuss skill development.
- Employees can take a proactive role in the career development conversation.

## Considerations

- Task Central must be activated to view the Skills Assessment section.

- It is not possible to report on the source of skills additions or updates, for example, Skills Profile, Performance Review, Check-in.
- Previous responses to Skill Assessment section custom questions are not visible in the review, so if the same section version is used in multiple reviews, users won't see the responses to the questions from an older review.
- The Skills Assessment section will not appear in the PDF printout of the review.
- Permissions applied to the portal also apply to the Skills components in the review.

## Implementation

This functionality is automatically enabled for all organizations using the Performance Review module

## Permissions

The following existing permissions apply to this functionality:

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Performance Review Form Sections - Manage	Grants ability to create and manage performance review questions and sections which are used in performance review tasks. This permission can be constrained by OU and User's OU. This is an administrator permission.	Performance - Administration

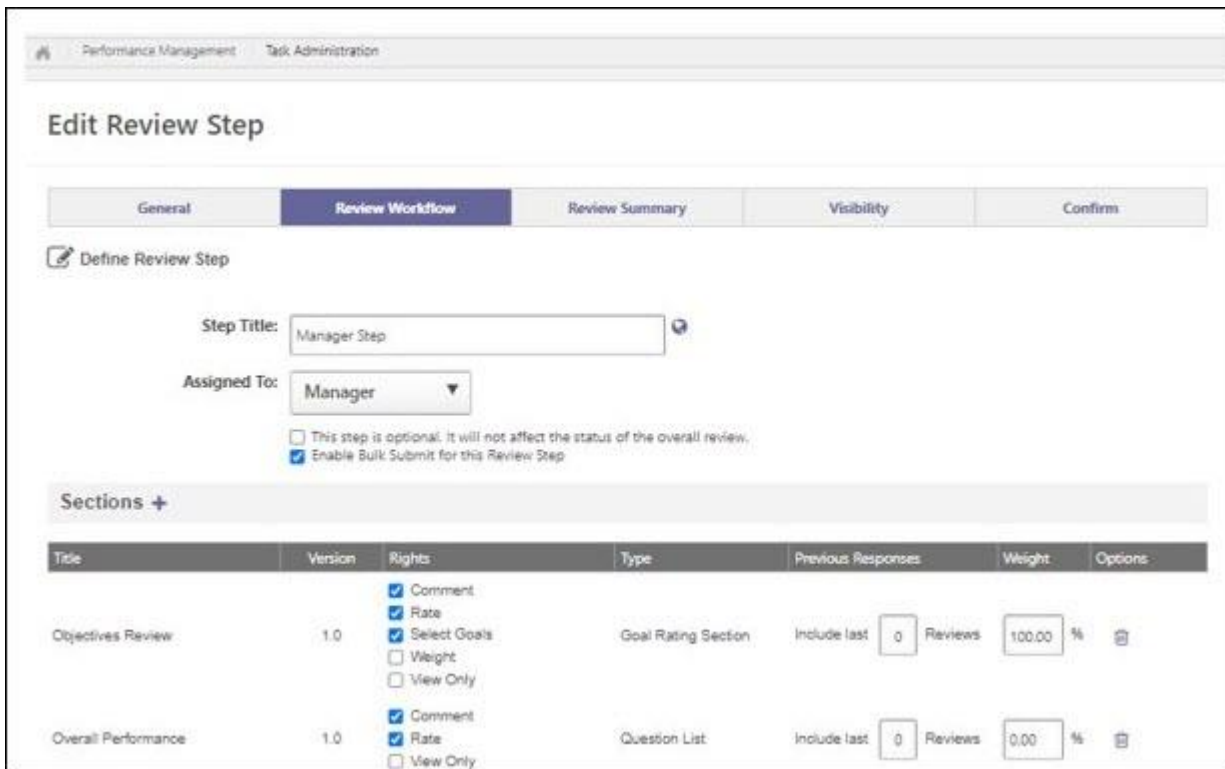
## Task Central – Bulk Submit (Early Adopter)

Bulk submit is targeted to be available in production and pilot environments, along with Review Task Central, in the April 14 patch.

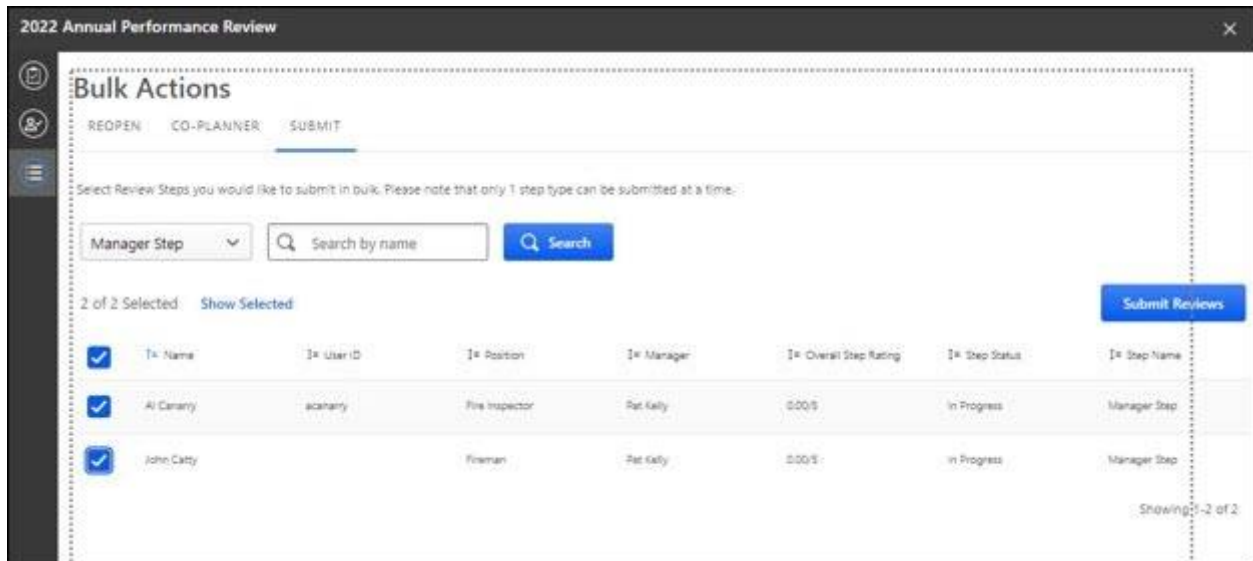
Prior to this enhancement, managers were able to submit one review step per reviewee, which was inefficient and did not allow the manager to check their work or ensure cross-team equity before submitting the review.

With this enhancement, a new Bulk Actions page allows reviewers to see which reviews are ready to submit and the overall rating for those reviews.

Administrators enable bulk submission by going to [PERFORMANCE MANAGEMENT > TASK ADMINISTRATION](#) and selecting the Review Workflow tab. In the Define Review Step section, click the **Enable Bulk Submit for this Review Step** check-box.



Once bulk submit is enabled, the Bulk Submit tab displays on the Bulk Actions Page in Task Central.



To bulk submit:

1. Click the **Submit** tab to view all available reviews.
2. Select a review step. This enables the selection check-boxes.
3. Select one or more reviews to submit.
4. Click **SUBMIT REVIEWS**. A notification message appears.

Once processing is done, a success message, a partial success message, or a failed message appears.

**Note:** During bulk action processing, the reviewer cannot navigate away from the Bulk Actions page.

**Note:** Bulk submit is enabled per step and cannot be enabled or disabled once a task is started.

## How Does this Enhancement Benefit My Organization?

Reviewers can clearly see what steps are not complete and informally calibrate reviews before submission.

## Considerations

- Bulk Submit supports 1,000 users per bulk submit action.
- Overall Step Rating only shows in the bulk submit table if an administrator enables the **For In Progress steps, commit Section and Step Scores to Reporting on Save by reviewers** option in task administration.

## Implementation

Bulk Submit is only available to customers who activate Task Central.

## Permissions

The following existing permissions apply to this functionality:

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Performance Review Task - Manage	Grants ability to assign performance review tasks and manage activity within those tasks. This permission works in conjunction with the Admin Visibility settings for the performance review task. Administrators who have this permission and are within the Admin Visibility settings can view the task, edit the task, add users, and view the task details. However, the admin cannot edit the Admin Visibility settings for the task. This permission can be constrained by OU, User's OU, User Self and Subordinates, and User. The constraints on this permission control which users can be added to the task.	Performance - Administration
Performance Review Task Administration	Grants ability to create/assign performance review tasks and manage activity within those tasks. This permission also gives the ability to enable and view co-planners for a task from the administration pages. This permission can be constrained by OU, User's OU, User Self and Subordinates, and User.	Performance - Administration

## Update Rating Scale in Review Tasks

Prior to this enhancement, customers had to submit a work order to update the title and description of a rating scale after a review is launched.

With this enhancement, administrators can edit the title and description of a Rating Scale on the Task Administration page. Once saved, the updates appear immediately on the Define Rating Scale page and users can see the updated ratings once they refresh the Review Task .pdf file.

To update the Rating Scale title and description, administrators can go to [ADMIN > PERFORMANCE MANAGEMENT > TASKS](#) and select the icon next to Overall Rating Scale. An editable Define Rating Scale window opens where you make and save the changes.

Users can see the updated rating when they generate a review task .pdf from the Define Rating Scale page.

### Implementation

This functionality is automatically enabled for all organizations using the Performance module.

### Permissions

The following existing permissions apply to this functionality:

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Performance Review Form Sections - Manage	Grants ability to create and manage performance review questions and sections which are used in performance review tasks. This permission can be constrained by OU and User's OU. This is an administrator permission.	Performance - Administration

# Succession Enhancement



## Reporting Fields - Succession

With the March '23 Release, new fields have been introduced to the Succession area of Reporting 2.0:

- Succession Task fields have been added

### Succession Task

The following new fields have been added to the *Succession Task* section of Reporting 2.0:

FIELD NAME	FIELD DESCRIPTION	FIELD TYPE
Task Start Date	This field displays the date when the succession task is set to begin.	Date
Task End Date	This field displays the date when the succession task is set to be completed.	Date

### Implementation

Upon release, this enhancement is available for all portals with Reporting 2.0.

### Permissions

For more information about Reporting 2.0 permissions, see the following:

- **Permissions in Reporting 2.0** - This provides detailed information about Reporting 2.0 permissions.
- **Permissions List** - This provides the list of permissions and their relationships so that you know which permissions users need to have to create and view reports.