MTR Troubleshooting Outline

Known Issues

In some rare cases, route map XML of a 360 form may be inconsistent with the state of folder maps. For example, users can see the 360 form has been completed but the route map bar is showing that the form is still in the signature stage. To resolve this problem, go to Provisioning > Modify Routing Map XML and fix it manually

Q: Who will receive the confirm email when the customer click the "Send Reminder to All Participants" button?

A: The participants who have completed or declined the form, or have been removed from the participant list won`t receive. The others will receive.

Dev Note:

Issue: MTR-1868

Class: FBSectUI_StateSummary

Function: resendMail, extractParticipants

How to create an issue for fetching the server log?

Reference the following page: http://confluence.successfactors.com/display/QA/Create+an+Issue+For+Fetching+the+Server+Log

Not showing get "Re-Calculate Rating" button in 360 form

To see the button, it should require two actions:

1 enable weight in form template
2 route the form to complete stage

details about enable weight in form template

Current behavior of document transfer

document transfer is a critical and complicated function.

there are four checkbox settings:

Automatic insertion of new manager as next document recipient if not already
Automatic Inbox Document Transfer To New Manager
Automatic En Route Document Transfer To New Manager
Automatic Completed Document Copy to New Manager

also there are four stage durnig work flow:

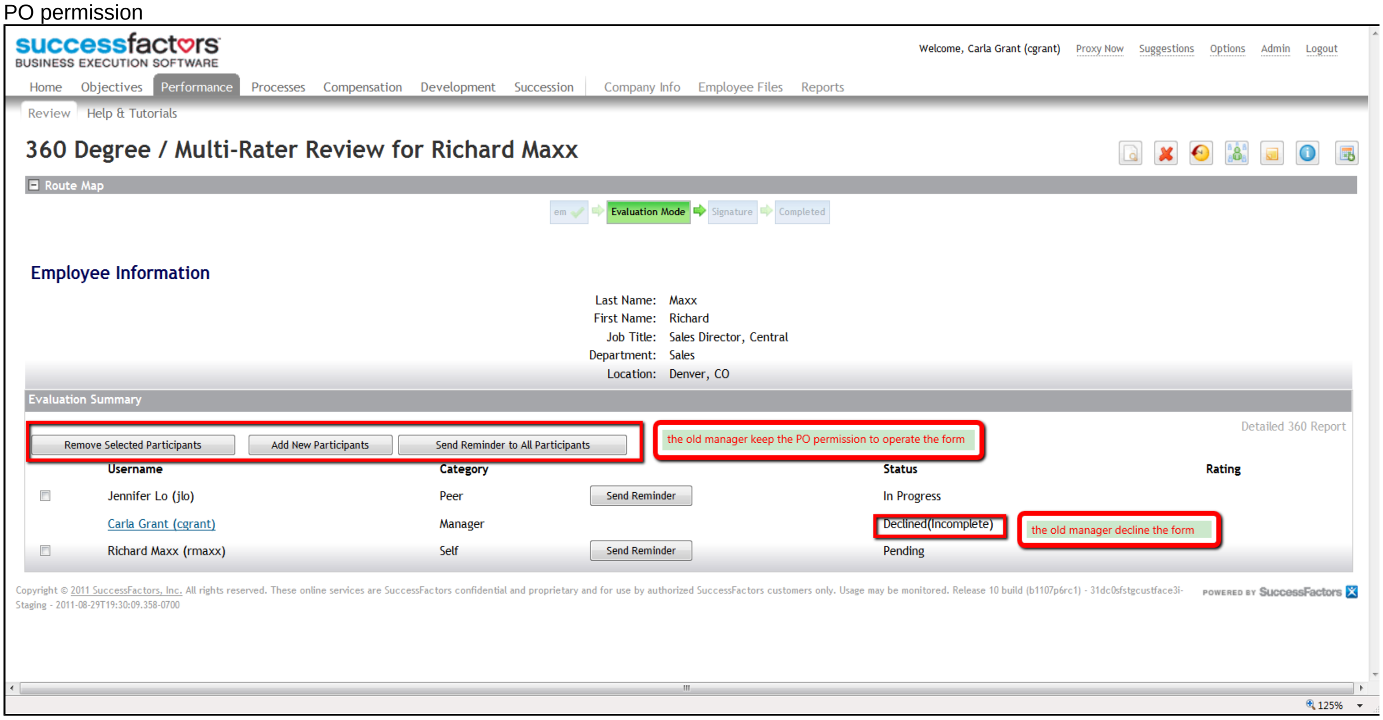
modify - evaluation - signature - completed

So we can see that only the last setting corresponds to the last stage, and the first setting is not related to stage.

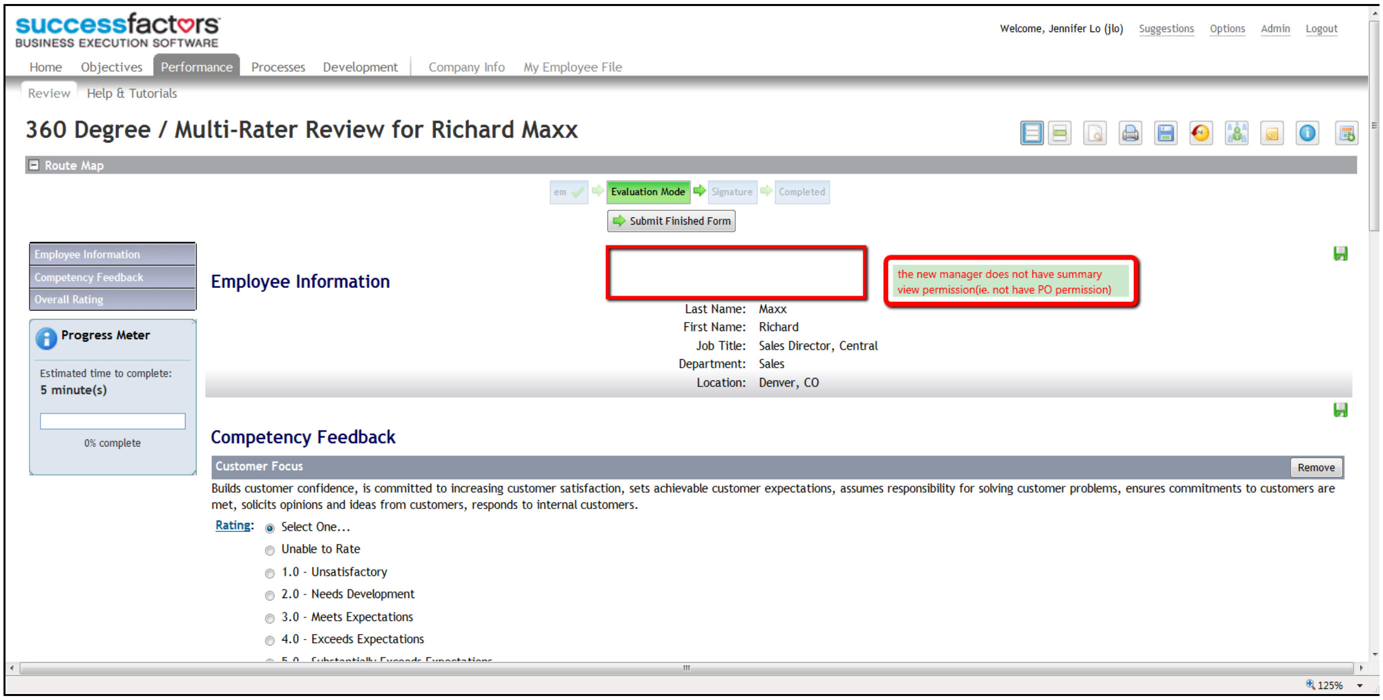
The other two settings correspond to three stages, and the behavior is almost the same:

decline the form, add one more stage, not change the Process Owner

For example, here is screenshot for old manager's view after document transfer during evaluation stage, we can see that old manager keep the PO permission



screenshot for new manager's view after document transfer during evaluation stage, we can see that new manager does not have the PO permission



For more details on document transfer, you can see here

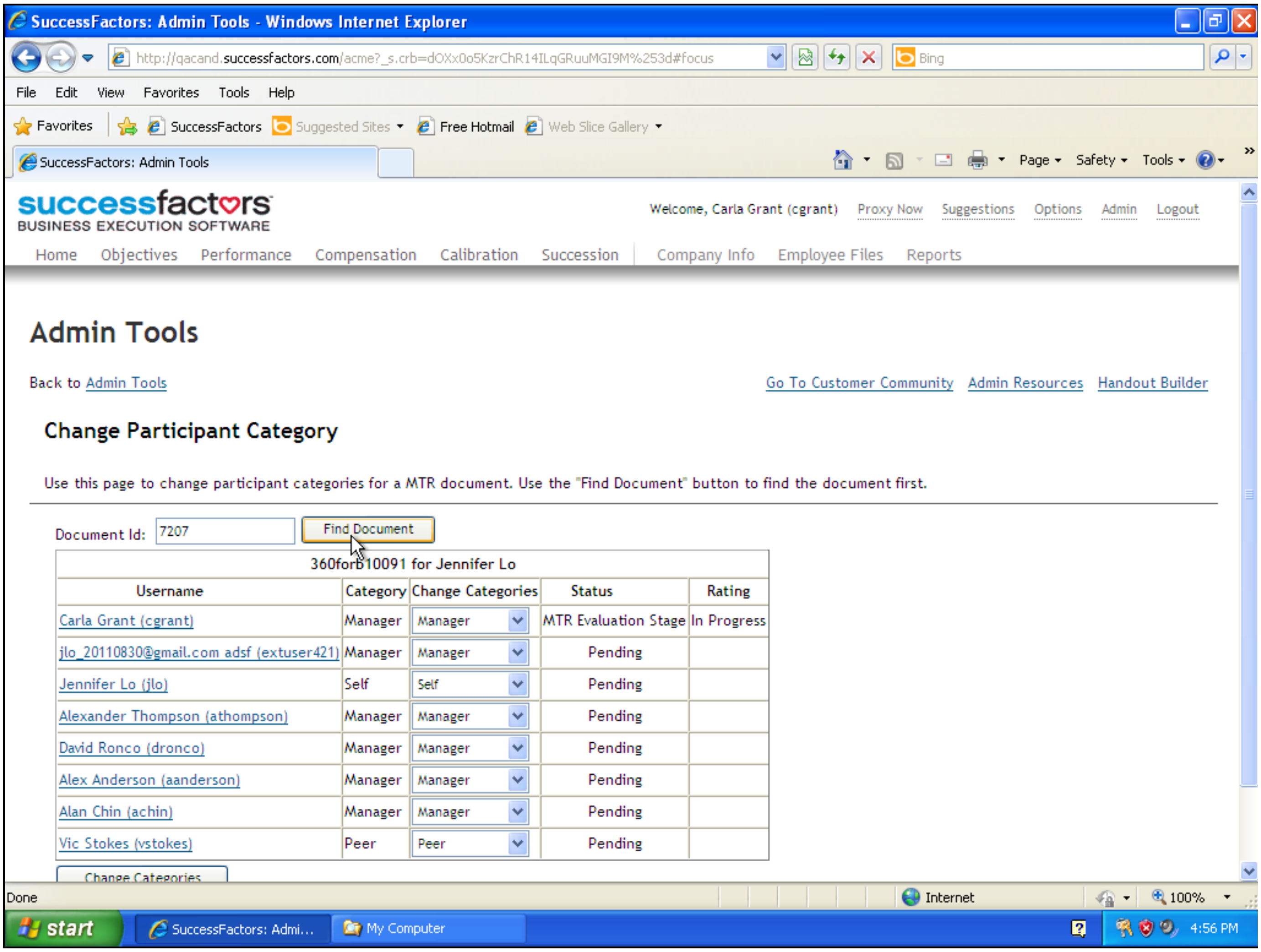
Mail for document transfer

Admin will receive a mail after he finished a document transfer, except doing the transfer in completed stage

For more details, see MTR-2094

How to do a quick fix when there is a missed category in form

Go to Admin Tools -> Manage Document -> Change Participant Category to change back the category



Who should be the Process Owner of the form?

Process Owner, default is the last approver who send the form into evaluation stage.

For example, if the routemap of form is: E-EM-EH-Eval, then the Process Owner should be EH.

Besides, you can use "Change Process Owner" function in Admin Tools to change the Process Owner of the form to whoever you want to be.

360 Multi-Rater does not support C-step

Please note that 360 does not support C-step, any issue occurs in route map with C-step is not accepted officailly.

There is an existing known issue for C-step is that when you do document transfer in C-step, there will be a missing category issue.

to quickly fix missing category, see #changeCategory

The External Users Are Invalid When Using RBP

This issue may be caused by the permission of login. You can grant the permission as the following.

Make sure your account has authority to grant permissions.

1.Go to 'admin' -> 'Manage Security' -> 'Manage Permission Roles'.

2.Click 'Create New'.

The screen shows as following.

3.Click 'Permission...' button.

4.Choose 'General User Permission' and select the 'User Login' as the following screen. Then save and go back to the first page.

5.Click 'Add...' button.

6.Select 'Everyone (All users)' as the following screen. Then save and go back to the first page.

7.At the end, save changes.

Then the external users can view the forms and finish them.

Why I can't resotre completed 360 to a user?

Restore completed 360 can only send the form back to a participant, So you may not be able to send it to other user even he/she is the Process Owner

Why I haven't form template settings in new admin tools (One Admin) Page?

If it the “Enable PE Self Service” box is checked in provisioning, you will not have that Form Template Administration link.

uncheck the box, then you can see the link under PM and 360 section in One Admin page

The "Send Back" button is missing.

As per MTR-2227, the "Send Back" button will be disabled when the below conditions are matched:* Process Owner is both a participant and a signer

- The 360 form is in the signature stage
- Process Owner is trying to access the "Send Back" buttons in the Summary View

Why I can't receive 360 evaluation notification email?

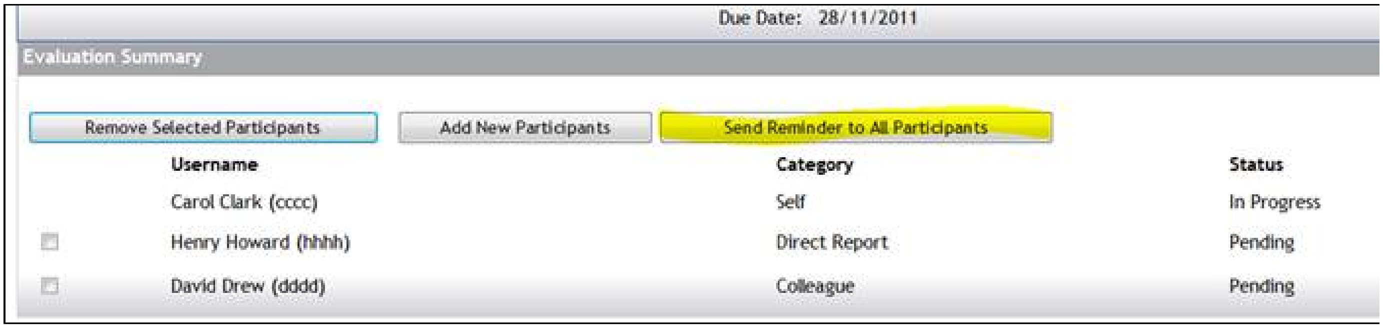
Sometimes you may not be able to receive 360 evaluation notification email even you enable the email template in admin tools, the reason might be that you haven't enable document due notification.

The 360 document evaluation notification relys on the document due notification.

*Note : *Email notification is not send to the process owner when adding the process owner in the signature step is a known issue - Link.

Why I can't see the "send reminder" button?

Sometime you may be puzzled that you can see "send reminder to all participants" button but no "send reminder" button for each single participant, as shown below



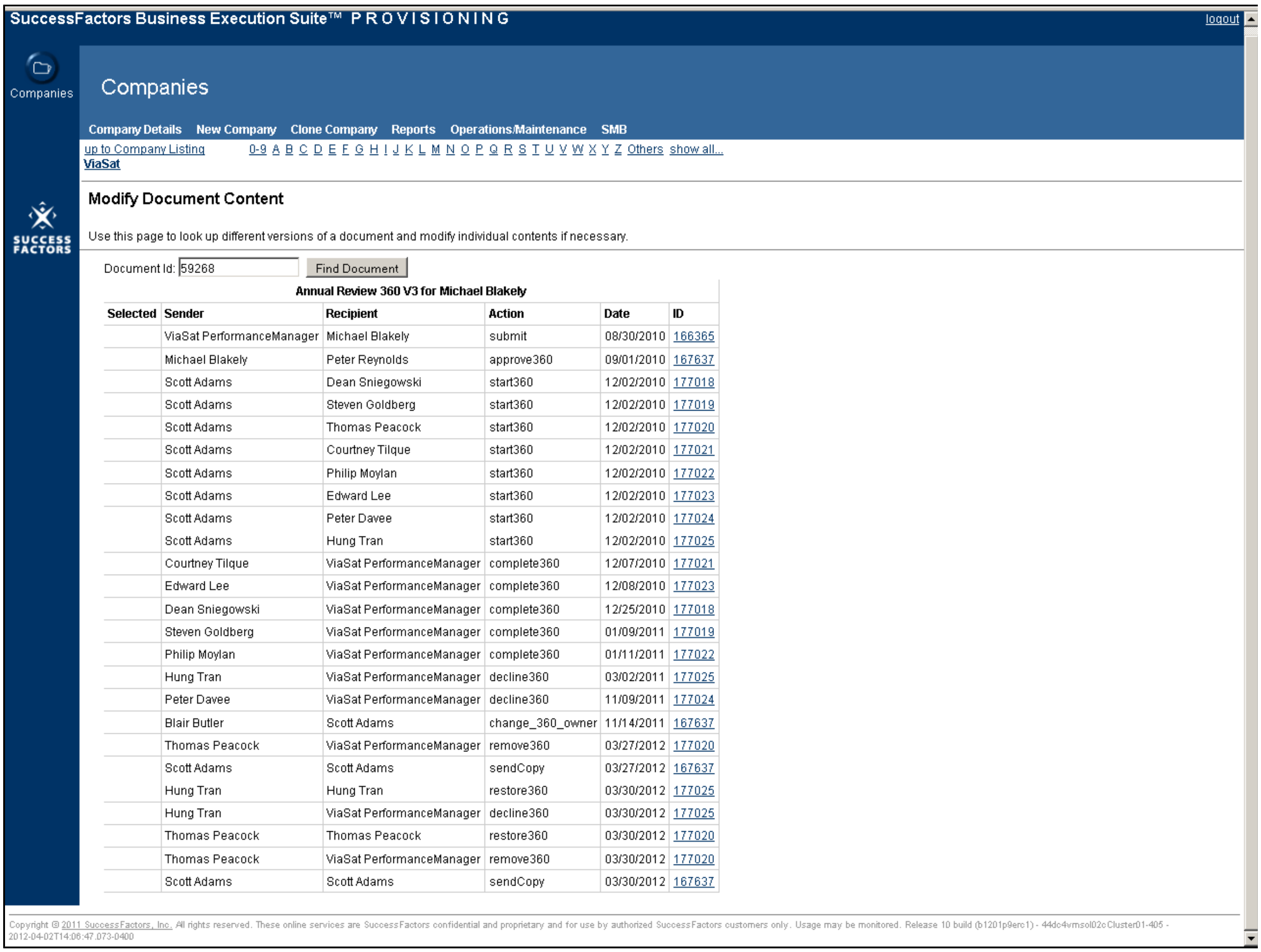
Username	Category	Status
Carol Clark (cccc)	Self	In Progress
Henry Howard (hhhh)	Direct Report	Pending
David Drew (dddd)	Colleague	Pending

The answer is just the same as the previous question: you should enable document due notification. Because the reminder is just the 360 document evaluation notification, without enable the email template, you will not be able to send reminder.

Format for default participant csv file in mass create form instance

See this page: http://testlink/testlink/lib/testcases/archiveData.php?edit=testcase&id=25525

Why we can see a audit that people "start360" is not the recipient of the last "approve360" step

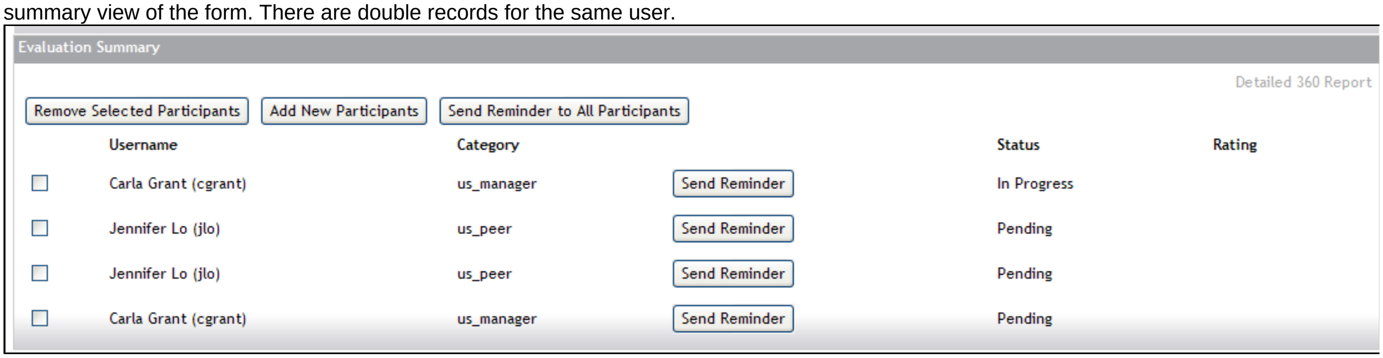


Selected	Sender	Recipient	Action	Date	ID
	ViaSat PerformanceManager	Michael Blakely	submit	08/30/2010	166365
	Michael Blakely	Peter Reynolds	approve360	09/01/2010	167637
	Scott Adams	Dean Sniegowski	start360	12/02/2010	177018
	Scott Adams	Steven Goldberg	start360	12/02/2010	177019
	Scott Adams	Thomas Peacock	start360	12/02/2010	177020
	Scott Adams	Courtney Tilque	start360	12/02/2010	177021
	Scott Adams	Philip Moylan	start360	12/02/2010	177022
	Scott Adams	Edward Lee	start360	12/02/2010	177023
	Scott Adams	Peter Davee	start360	12/02/2010	177024
	Scott Adams	Hung Tran	start360	12/02/2010	177025
	Courtney Tilque	ViaSat PerformanceManager	complete360	12/07/2010	177021
	Edward Lee	ViaSat PerformanceManager	complete360	12/08/2010	177023
	Dean Sniegowski	ViaSat PerformanceManager	complete360	12/25/2010	177018
	Steven Goldberg	ViaSat PerformanceManager	complete360	01/09/2011	177019
	Philip Moylan	ViaSat PerformanceManager	complete360	01/11/2011	177022
	Hung Tran	ViaSat PerformanceManager	decline360	03/02/2011	177025
	Peter Davee	ViaSat PerformanceManager	decline360	11/09/2011	177024
	Blair Butler	Scott Adams	change_360_owner	11/14/2011	167637
	Thomas Peacock	ViaSat PerformanceManager	remove360	03/27/2012	177020
	Scott Adams	Scott Adams	sendCopy	03/27/2012	167637
	Hung Tran	Hung Tran	restore360	03/30/2012	177025
	Hung Tran	ViaSat PerformanceManager	decline360	03/30/2012	177025
	Thomas Peacock	Thomas Peacock	restore360	03/30/2012	177020
	Thomas Peacock	ViaSat PerformanceManager	remove360	03/30/2012	177020
	Scott Adams	Scott Adams	sendCopy	03/30/2012	167637

When we change 360 process owner, the audit for start360 will change to the new process owner as the pic above

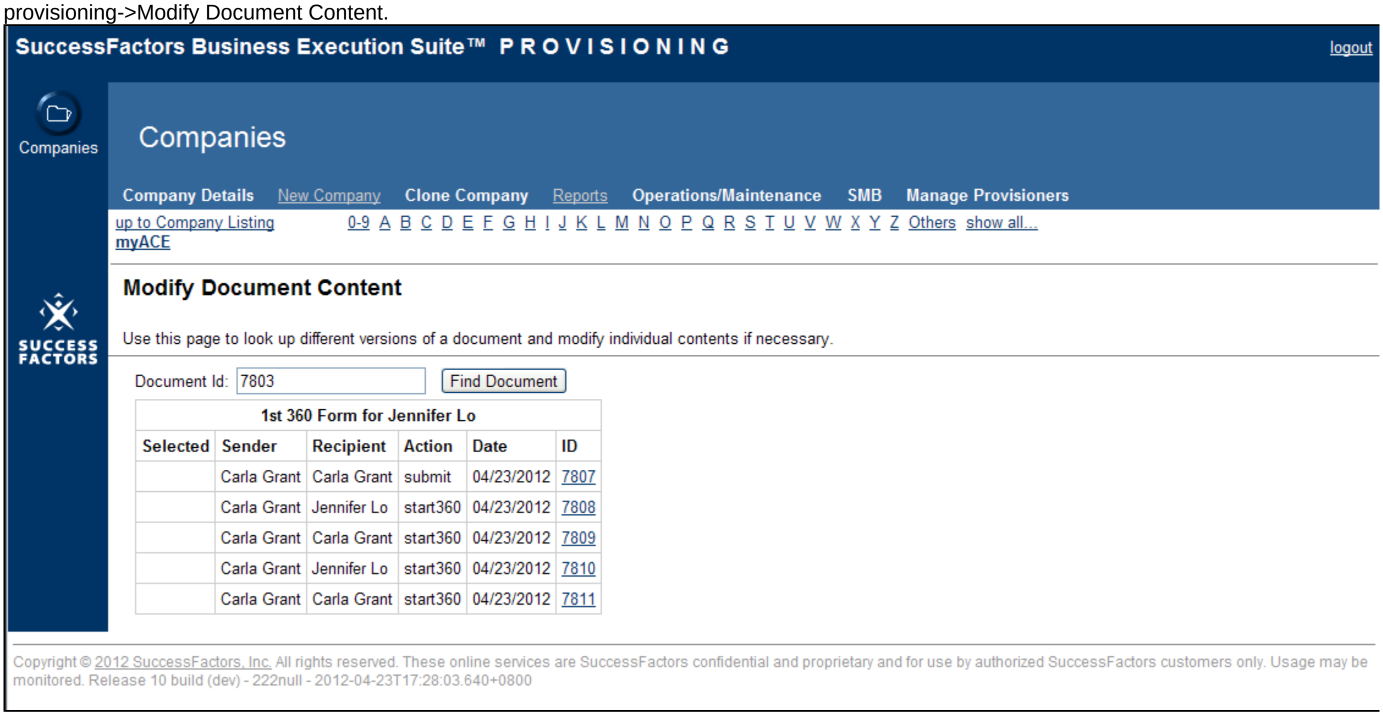
The appearance of duplicate 360 forms and fixing script

The problem is occurred when the 360 form is started more than twice by some operations of users in UI. The appearance is like following in summary view of the form. There are double records for the same user.



Username	Category		Status	Rating
Carla Grant (cgrant)	us_manager	Send Reminder	In Progress	
Jennifer Lo (jlo)	us_peer	Send Reminder	Pending	
Jennifer Lo (jlo)	us_peer	Send Reminder	Pending	
Carla Grant (cgrant)	us_manager	Send Reminder	Pending	

If anonymous participants are set for the form template, the audittrail will also show double start360 actions for one user. It is in provisioning->Modify Document Content.



Selected	Sender	Recipient	Action	Date	ID
	Carla Grant	Carla Grant	submit	04/23/2012	7807
	Carla Grant	Jennifer Lo	start360	04/23/2012	7808
	Carla Grant	Carla Grant	start360	04/23/2012	7809
	Carla Grant	Jennifer Lo	start360	04/23/2012	7810
	Carla Grant	Carla Grant	start360	04/23/2012	7811

Here is the script which is used for removing the duplicate records after b1204:

ant runclient -Dscript_class="com.successfactors.pm360.script.SF360Client" -Dscript_args="-c [companyId] -fixDuplicateStart360 -formDataId [formDataId]"

MTR related Tables in database to be purged by data-purge

Here are tables which will be purged in db:
feedback
fb_ext
route_step_local
mtr_participant(purged by form content id)
folder_map
audittrail
form_content
route_entry
todo_entry
form_comment
form_data

All tables except mtr_participant will be purged by form data id.

Why a user with detailed report permission can't see the full detailed 360 report

For users who are enabled the detailed report permission in admin tools or templates

Some people may only see the detailed report within his/her own ratings & comments, some may see the full detailed reports.

The reason for the behavior is that only the approvers(step owner of modify steps) can view the full 360 form, participants of evaluation step can only see his/her own form; so, as a result, the participants with detailed report permission can only see the report on his/her own.

About Step Due Date

For example, if the due date of one step is set 6/20. Then if this step is not completed before 6/20, then it will be auto-routed on 6/21, ***not 6/20***.

Some Corner Cases of Rollup Category

If the rater number of one category(included in rollup) is zero and previous categories are all finished Rollup process, then it will treated as one single category which meets the threshold.

Category Rollup order and threshold:
CatA 3
CatB 3
CatC 3
CatD 3

SITUATION 1: (uturn)
-Real Rater number:
CatA 2
CatB 2
CatC 0
CatD 2
-Real Rollup category:
CatA/CatB
CatC/CatD
-Description:
First, CatA and CatB will be combined as CatA/CatB. Their rater size meets the threshold of CatB. Then handle CatC. As CatC`s all previous categories, here are CatA and CatB, are all combined and meet the threshold, and CatC`s rater size is zero, so it will be shown as a single category and be treated as meeting the threshold. Now the list of categories which have already met the threshold is [CatA/CatB, CatC]. As CatD do not meet the threshold and it is the last category, according to 'uturn' it will combined the last category of the above list. So it will be CatC/CatD.

SITUATION 2: (uturn)
-Real Rater number:
CatA 1
CatB 1
CatC 0
CatD 2
-Real Rollup category:
CatA/CatB/CatC/CatD
-Description:
First, CatA and CatB will be combined as CatA/CatB. But their rater size does not meet the threshold of CatB. So when handling CatC, it will not been treated as a single category because its previous categories CatA and CatB have not finished the process of Rollup, so CatC will be combined with CatA/CatB.

SITUATION 3: (uturn)
-Real Rater number:

CatA 1
CatB 2
CatC 2
CatD 0
-Real Rollup category:
CatA/CatB/CatC/CatD
-Description:
First, CatA and CatB will be combined as CatA/CatB. And then like SITUATION 2 CatC and CatD will be combined as CatC/CatD because when handling CatD, CatC does not finish the rollup process. Now the list of categories which have already met the threshold is [CatA/CatB]. And then, as CatC/CatD also does not meet the threshold of CatD, they will be combined with the last category of above list because of 'uturn'. So finally it will shown as CatA/CatB/CatC/CatD.

Email notifications

- **Evaluation Notification**

1. Notification sent automatically when routing the form to next step

(1) For internal user, use template: “360 Document Evaluation Notification”

If we add tokens: ACCEPT/DECLINE to the templates above, it will NOT be replaced by links, the tokens will show in the notification.

If above template is not enabled, use template: “Document Routing Notification”

(2) For external user, use template: “360 Document Evaluation Notification for External Participant”

If we add tokens: ACCEPT/DECLINE to the templates above, it will be replaced by links.

If above template is not enabled, no notification will be sent.

Related code: Approve360.sendEmailNotifications()

1. Notification sent after click “Send Reminder” or “Send Reminder to All Participants”

It follows below logic:

(1) for v11, external participants, reminder mail is sent as "360 Document Evaluation Notification for External Participant"

(2) for other cases(v10 notification, or v11 internal notification), reminder mail is sent as "Document Due Notification"

(3) if last two notification is not enabled, we use "360 Document Evaluation Notification"

(4) click 'resend mail' or 'resend reminder for all participants" to check mail content;

(5) check all the tokens are replaced correctly in mail content;

Related code: EmailHelper.resendMail()

- **Step Due/Over Due Notification**

Notification sent by SFScheduler automatically, the send date of the notification is related to the due date of the step in route map.

Template: Step Due Notification/Step Over Due Notification

Tokens ACCEPT/DECLINE will NOT be replaced.

Related script: ant runclient -Dscript_class="com.successfactors.platform.service.ejb.SFScheduler" -Dscript_args="-c goodcompany -360StepDueLateEmail Due"

- **Document Due/Late Notification**

Notification sent by Scheduler automatically, the send date of the notification is related to the due date of the form.

Template: Document Due/Late Notification

Tokens ACCEPT/DECLINE will NOT be replaced.

Related script: ant runclient -Dscript_class="com.successfactors.platform.service.ejb.Scheduler" -Dscript_args="-c goodcompany -scheduleEmail Due"

Form template name localization

Q: what will be shown as the form name when there is no specific template title name set for the current language
A: It will show name that the form created with. (At the create time, it will shows the name in company default language if no template title name for current language)

Rating Calculation in Detailed 360 Report

The detail of the rating calculation in Detailed 360 Report is in this page:https://confluence.successfactors.com/display/QA/360+Detail+Report+Rating+Calculation

The Permission to 1)Display Participant Ratings, 2)Re-calculation Button And 3)For-Calculation Checkbox in Summary Report

These will be shown if

1. The form status (not form copy) is completed. (No need for 1))

2. The login user has the drill-down permission.

3. The login user is the process owner of the form. (No need for 1))

4. At least one of the participants` forms is rated. (No need for 1))

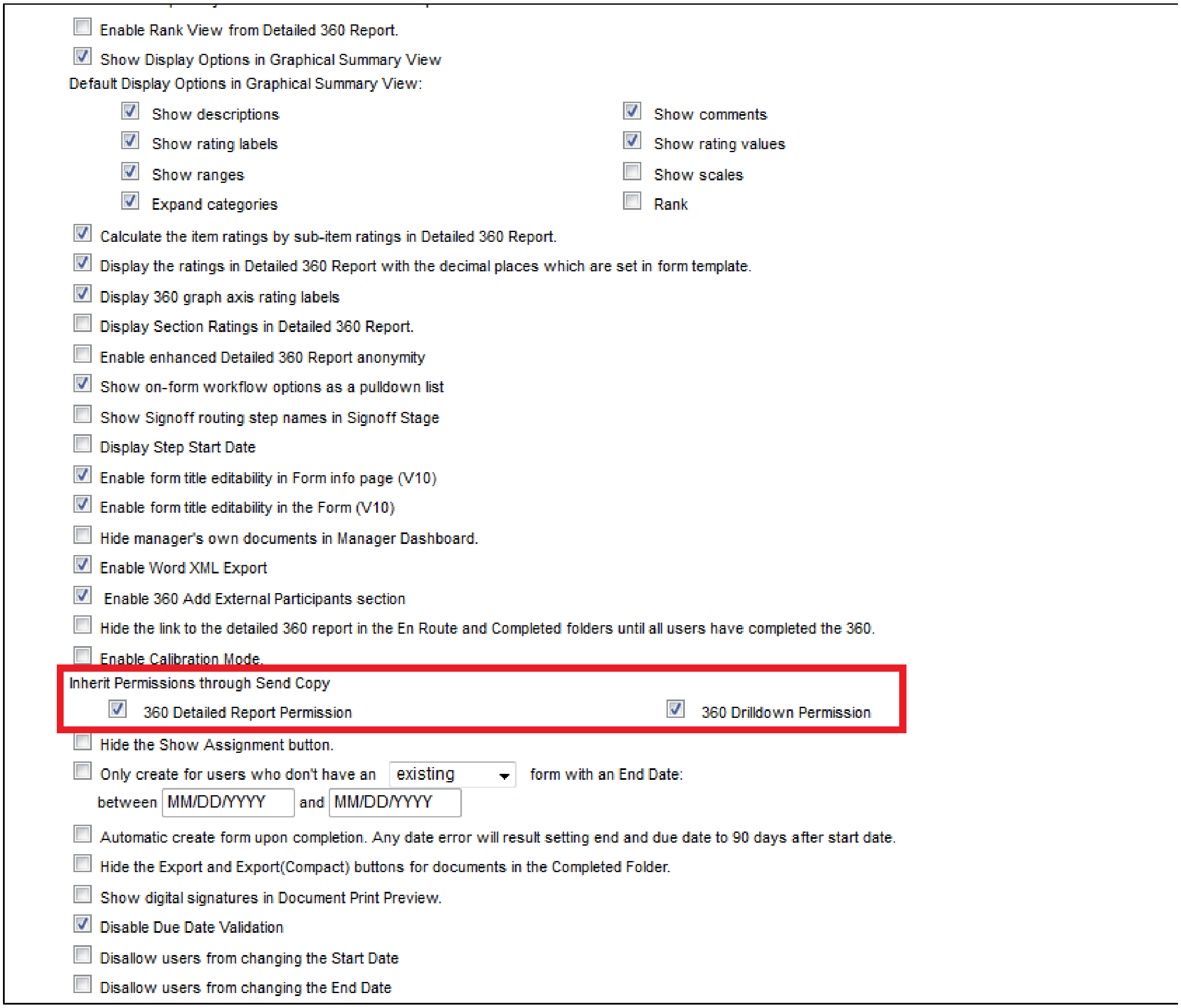
5. In form template XML, sect-scale is set in fm-meta.

6. In form template XML, (1) no-calc is set false or (2) there is one summary-section and manual-rating of it is set true.

(#5 and #6 will impact the overall rating calculation.)

How to use Send Copy to View the Full Evaluation Summary and Detailed 360 Report

Send Copy is a useful tool in 360 forms that can help transfer the form contents to users without proper permissions as well.
By Send Copy, the receipient will inherit the permission to see the ***full evaluation summary*** from the sender auomatically, and you can configure to enable or disable the inheritance for Detailed 360 Report permission and 360 Drilldown permission in form template



- [ ] Enable Rank View from Detailed 360 Report.
- [x] Show Display Options in Graphical Summary View

Default Display Options in Graphical Summary View:

- [x] Show descriptions
- [x] Show comments
- [x] Show rating labels
- [x] Show rating values
- [x] Show ranges
- [ ] Show scales
- [x] Expand categories
- [ ] Rank

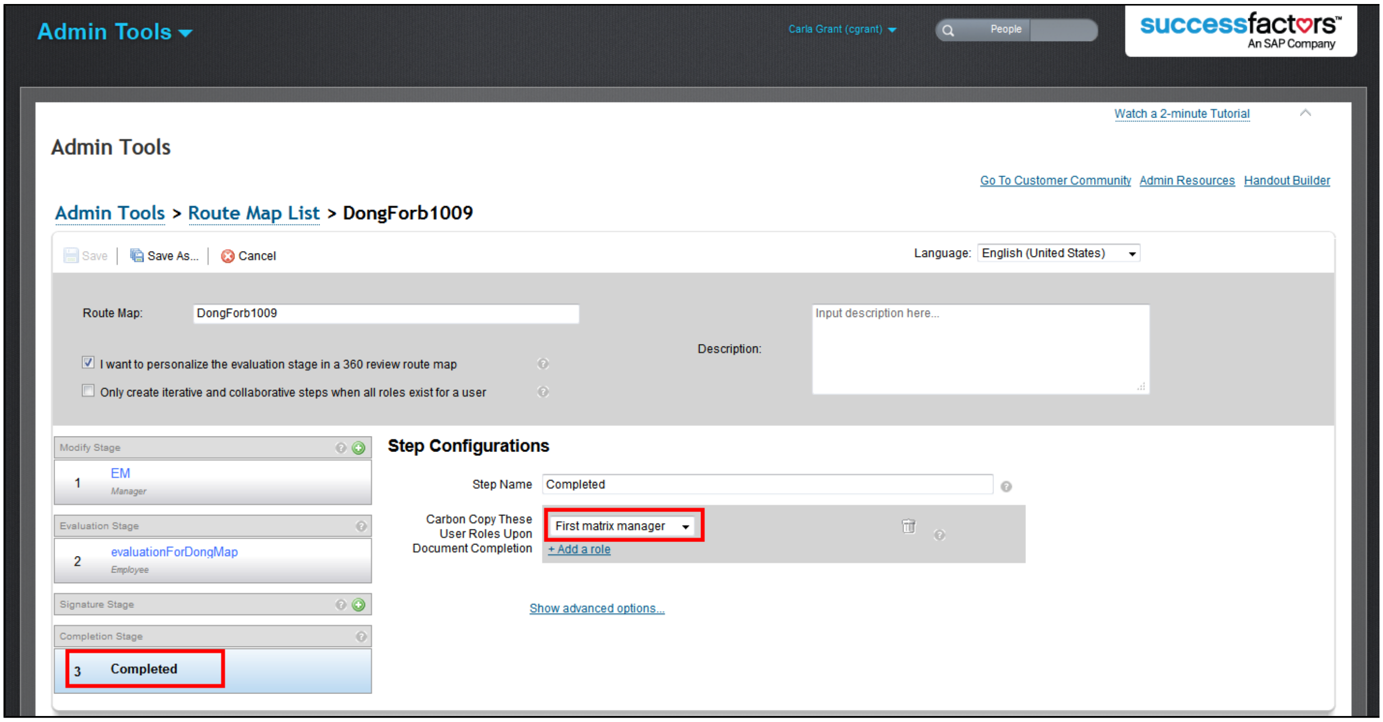
- [x] Calculate the item ratings by sub-item ratings in Detailed 360 Report.
- [x] Display the ratings in Detailed 360 Report with the decimal places which are set in form template.
- [x] Display 360 graph axis rating labels
- [ ] Display Section Ratings in Detailed 360 Report.
- [ ] Enable enhanced Detailed 360 Report anonymity
- [x] Show on-form workflow options as a pulldown list
- [ ] Show Signoff routing step names in Signoff Stage
- [ ] Display Step Start Date
- [x] Enable form title editability in Form info page (V10)
- [x] Enable form title editability in the Form (V10)
- [ ] Hide manager's own documents in Manager Dashboard.
- [x] Enable Word XML Export
- [x] Enable 360 Add External Participants section
- [ ] Hide the link to the detailed 360 report in the En Route and Completed folders until all users have completed the 360.
- [ ] Enable Calibration Mode.

Inherit Permissions through Send Copy

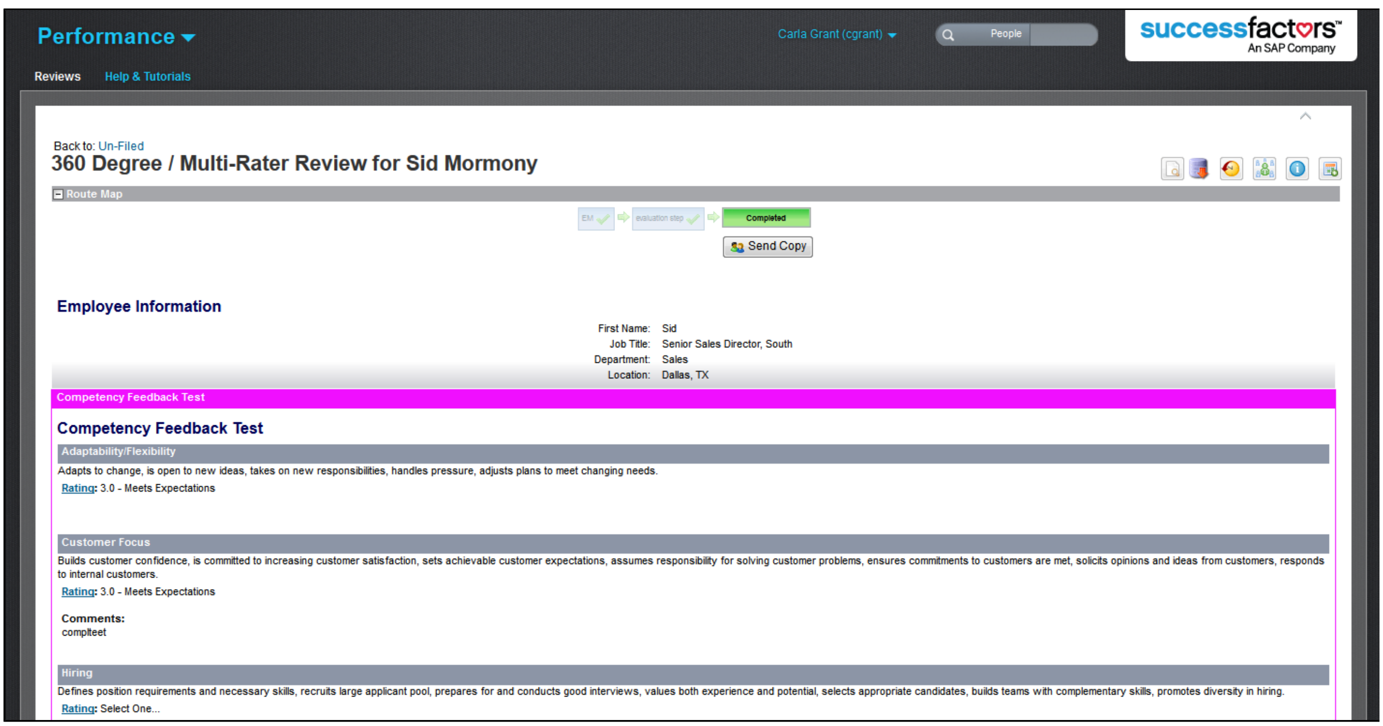
- [x] 360 Detailed Report Permission
- [x] 360 Drilldown Permission

- [ ] Hide the Show Assignment button.
- [ ] Only create for users who don't have an existing form with an End Date: between MM/DD/YYYY and MM/DD/YYYY
- [ ] Automatic create form upon completion. Any date error will result setting end and due date to 90 days after start date.
- [ ] Hide the Export and Export(Compact) buttons for documents in the Completed Folder.
- [ ] Show digital signatures in Document Print Preview.
- [x] Disable Due Date Validation
- [ ] Disallow users from changing the Start Date
- [ ] Disallow users from changing the End Date

Send Copy can be set automatically or be sent manual at ***complete stage***.
To set auto Send Copy, you need to set the CC role in complete step in route map.
As the pic below, select the completed step, and select one or more roles in "Carbon Copy These User Roles Upon Document Completion" field



To maunally Send Copy, you can see the button in completed form



How to Configure Learning Environment for Integration Testing

There is a link from CDP teamQA Environments for SF Learning Integration Release

To link a learning environment to our QA environment, we need a learning tenant

Why the form template name localization doesn't work sometime?

The translation for form template name can be set in admin tools>Company System and Logo Settings, with the below items:

Please select preferred method to handle a change to this form template's name:
All documents will display their form template name at the time the document was created. This option does not support translations of the document name.
All documents will display their current form template name as configured in the Form Template Administration settings. This option supports translations of the document name.

Why do I receive the "Summary of *** mail" sometime?

Some customers said they receive the mail titiled "Summary ***" when there is no email template set as it.
The reason is that the checkbox "Consolidate notifications for the same recipient into one single email." for the email template is enabled. So that you will receive the summary mail for the consolidated notifications.

Why does button-permission defined with step-id '360EvaluationStage' not take effect?

In form template xml, we could set rater-id-permission or button-permission. In rater-id-permission, we could define specific route steps through route-step, and if we want to set the evaluation step, we need to use '360EvaluationStage'(not the evaluation step id). And in button-permission, we could also set specific steps. But we need to use real evaluation step id instead of '360EvaluationStage'.

Why am i not able to see the comments in summary view?

Only Process Owner could see comments in summary view in signature/complete stage. And currently only comment from declined forms will display.

Why does button-permission sometimes not take effect?

1) 'button-permission' will check the step id in 'fm-meta', not the current step id of route map. 2) The definition of 'stepid' in 'button-permission' for 'detailed-360-report' still supports 'CompletedStage', which is already discarded in PM form. 3) See 'Why does button-permission defined with step-id '360EvaluationStage' not take effect?'

What is the root cause of the error "Assertion failed: mi is not available, make sure it is properly configured in data model"

when you click "find user" in search by "Employee's Folder" in Route Document, you may see such an error "Assertion failed: mi is not available, make sure it is properly configured in data model".
This is a configuration issue, you need to add the <standard-element id='mi'> in data model, details in the link

How to config the SFAPI AdhocReport testing environment?

enable SFAPI, AdHoc report API in provisioning>company settings
enable API login permission for a user in admin tools>Manage API Login Permission
now you can use the API test tool on http://10.6.124.149:8080/test (login with the user who has API login permission, and get the API report)

How to change rater category for 360 form?

You can just change the meta-cat element in form template, but currently there are two issues to concern:
1. The category name should be consistant in the following elements: meta-cat, meta-360-rollup-category-name and default-rater. Otherwise it will not pass the form template validation, when you upload the form template.
2. The showing category name will not be the one in form template when you use msgKey for internationalization, you should use Manage Form Label Translations

Why the permission check is not correct for some roles?

Role EP, F, O are not supported in all permission fields. And it will also cause some unexpected permission problems.

Like when role O is set, it will use default permission check, which is when role charactor length is 1, then it will check if the login user is subject. Then when subject view the form, his permission check will obey O`s permission, which will be an issue.

What is the difference between "Participant Level" and "Item Level" for Threshold Control?

"Participant Level" and "Item Level" are just the options as threshold on/off controls. When "Participant Level" is selected, the drop threshold will be applied on detailed report. And when "Item Level" is selected, drop threshold will not be applied.

How to view participant section in summary view?

1. form is anonymous 360.
2. "Show Participants in Status Summary (Applicable to Anonymous 360's only)" is enabled in template settings.
3. the viewer is PO or approver.

Why the min-rater-count/max-rater-count/min-rater-complete-count doesn't work?

1. For these rater count validations, we need to set the corresponding error/warning message in template xml so that the error/warning messages for them can be shown in our work flow.
2. For ***min-rater-complete-count*** validation, it ***only*** works in the signature step of work flow, if the route map does not have signature step, the form will directly route to complete even the min-rater-complete-count is not met.

Why Remove Objective button in content selection section does not display correctly in one specific locale?

Such issue might be caused by text replacement definition in goal template like following. For more details, please refer to http://jira/browse/MTR-2727 .

<text-replacement for="delete-goal-from-form">
  <text lang="en_US"><![CDATA[Remove Objective]]></text>
  ....
</text-replacement>

Valid VPD instance on QACAND:

trialmdr

How to config the picklist for the user info section

1. Get the picklist in admin tools>picklist
2. Set the <picklist id> for standard-element in data-model, e.g.
   <standard-element id="custom15" max-length="255" required="false" matrix-filter="false">
   <label>Functional Competency Model</label>
   <picklist id="Functional"/>
   </standard-element>
3. Config the <user-info-section> in form template, add fm-element for the mapped standard element, e.g.
   <fm-element index="5" type="3"> <ekey><![CDATA[CUSTOM15]]></ekey>
   <ename><![CDATA[]]></ename>
   <evalue><![CDATA[]]></evalue>
   </fm-element>
4. Go to admin tools> Manage Users, set the value of the target user's user info field(this time is custom15) as one of the optionID of the picklist item(this time is functional), you can get the optionID from the picklist

360 Form does not support the "autosync" attribute for objective section

The autosync attribute doesn't work on 360 form, no matter it is set as true or false, the form has the same behavior:

New goal created in 360 form should get added to the goal plan

Goal deleted from 360 form template will not be deleted from goal plan.

New goal created in goal Plan should not get added to the 360 form

Goal deleted in goal plan will not be deleted from 360 form template