Revision history:

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| **Version** | **Date (build)** | **Author** | **Notes** |
| 1.0 | 2/15/2015 | Anthony Johnson | Initial creation |
| 1.1 | 2/24/15 | Anthony Johnson | Added Compensation & 360 sections |
| 2.0 | 4/29/15 | Anthony Johnson | Split out CPS Evaluation - Refer to Job Aid options – See CPS EVAL JOB AID |
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**Contents**

[Introduction: 2](#_Toc418088782)

[Forms & Plans Covered 2](#_Toc418088783)

[How to Use This Guide 2](#_Toc418088784)

[Terminology 3](#_Toc418088785)

[Disclaimers 4](#_Toc418088786)

[Timing 4](#_Toc418088787)

[Changes Possible via Admin Tools or Provisioning 5](#_Toc418088788)

[Main PM Form Management 5](#_Toc418088789)

[Role Permissions 6](#_Toc418088790)

[Form Transfers 7](#_Toc418088791)

[Form Dates & Step Dates 7](#_Toc418088792)

[Goal Sections (Includes CDP and Learning Activities) 8](#_Toc418088793)

[Competencies 9](#_Toc418088794)

[Ratings and Rating Scales & Weightings 9](#_Toc418088795)

[Add Remove Buttons & Pods 10](#_Toc418088796)

[Workflows/Route Maps 11](#_Toc418088797)

[General Form Features 11](#_Toc418088798)

[Notifications/Emails 12](#_Toc418088799)

[Enroute Stage Options 12](#_Toc418088800)

[Signature Stage Options 13](#_Toc418088801)

[Completed Stage Options 13](#_Toc418088802)

[Print Options 14](#_Toc418088803)

[360 Multi Rater 14](#_Toc418088804)

[360 Participant Controls 17](#_Toc418088805)

[360 Category Controls 18](#_Toc418088806)

[360 Report Controls 18](#_Toc418088807)

[Compensation & VarPay Worksheets 19](#_Toc418088808)

[XML Level Changes 23](#_Toc418088809)

[Cloud Product Support Evaluation 23](#_Toc418088810)

# Introduction:

The SuccessFactors Performance Management module has a very powerful set of options to enable administrators to make changes to templates and forms. This document outlines the various ways and places that changes can be made to live forms. This document contains a section for changes that can be made via Admin Tools Self-Service, and a section for changes that can only be done via Support.

Forms & Plans CoveredPerformance Management, 360, Compensation, Goal Management

## How to Use This Guide

This guide is intended to be a “Searchable” Document. From the left Navigation Panel enter a search word. You will see results below that indicate options within the guide. See example for “Competency” in the following image. Note how you instantly see all references and can click on any to quickly navigate to that entry.



If you do not get results try using different search words. You should find a result somewhere as this document covers the vast majority of PM GM COMP features. We hope this guide will greatly reduce the amount of time it takes to determine if the desired change is possible, and how to make the change.

## Terminology

Template: Your XML template is the basis that all forms will be based on. When you update the template XML you are not updating any forms, only the master template your forms will be based on. Your template is not a live from.

Template Settings: In addition to the master template xml, you can also access template settings via a UI in Admin Tools > Manage Templates. From here you can update most template settings. Some of these apply to live forms (advanced settings in PM v12A), whereas some do not.

CPS Evaluation: SuccessFactors internal evaluation to see if a change can be supported via our internal Dynamic Form Tool. More information about this tool is found below.

Live Forms: Live forms are forms that you have launched to your end-users, and are still in-progress and have not yet reached the completed stage.

Completed Forms: Forms that are no longer in progress.


*(Img 1. Typical Form Workflow -
Any forms in steps 1 through 4 are live forms. Once in step 5-Completed the form is closed out and cannot be altered in any way. Typically you cannot make any changes to forms in steps 3 or 4 except for those documented below)*

# Disclaimers

* *We have made every effort to ensure accuracy in this document, however we cannot guarantee every option is true in your instance. Features change over time, and especially between versions, for example PMv11, PMv12 PMv12A. What works in one version may not in another. We indicate known limitations based on knowledge at time of writing.*
* Customers are responsible for applying all changes to their own instances (including test) via admin tools. Support does not make Admin Tools setting changes, but can show a customer how to make a change.
* Support engineers are limited in ability to provide recommendations as to whether a feature should be on/off or otherwise. All options exist because for some customers they are valid. Determining what is correct for your process is done at implementation before go-live, not by support staff between cycles.

## Timing

The following are typical turnaround times.

* **Admin Tools:** Many items possible in admin tools apply immediately unless otherwise stated.
* **Provisioning:** Any settings that support can update via provisioning typically take 1-5 days to process but will apply immediately.
* **CCORs:** Any changes that require a Change Order (CCOR) can take anywhere from 1-3 weeks depending on complexity and current priorities.
* **Not Possible:** Those listed as not possible/unsupported mean there is no technical solution here. We are unable to create a custom solution; even if a customer was prepared to pay for this it still is not possible. Only a relaunch of new forms can provide the desired behavior change.
* **CPS Evaluation:** This process can take up to 3 weeks if a change is deemed technically possible.

# Changes Possible via Admin Tools or Provisioning

|  |
| --- |
| Main PM Form Management |
| Notes: Changing anything via Admin Tools > Manage Template (template editor) will NOT apply to live forms. Most options in the “General Settings” and the “Edit Fields and Sections” screens will apply to new forms only. The only exceptions are the options listed below that are found in the “Advanced Settings” screen (Under General Settings). |
| **Deactivate Template**  | Admin Tools > Performance > Manage Templates > Active/Inactive check box | Unchecking the Active check box will disable the template and prevent people from using this in the future | It will not deactivate any existing forms, just prevent more forms from being launched. |
| **Delete Forms** | Admin Tools > Performance > Delete Forms | Can delete forms 1x1, by template or in batches | Deleted forms can always be restored.See also the “Delete Button” options in the buttons section. |
| **Restore a Deleted Form** | Admin Tools > Performance > Restore Deleted Form |  | (also consider the template option “Enable Auto Restore Deleted Form When Importing User”) |
| **Remove Forms for Inactive Users** | Provisioning > Remove Inactive Employee Documents | Generally this should be handled by enabling this in user imports | We can clean up these for customers if many exist because admins forgot to use the checkbox in user imports. |
| **Logo on the form** | Admin Tools > Company Settings > Company System and Logo Settings | Update your main logo | Applies system wide and not just a specific form. |
| **Allow a person to create a form for any subject** | Admin Tools > Template > Allow form creator to select anyone as the subject | Immediately applies to all forms using this template when launching forms individually | If you can normally only create for the Employee and want to allow people to create a form for others as the subject. |
| **Comments: Not showing in C Step** | Admin Tools > Template > Allow exit step comments to be visible to all participants in a Collaborative (C) Step | Immediately applies to all forms using this template | Use this when comments need to be seen by those other than the manager. (only applicable for forms that have not progressed beyond the C Step) |
| **Form Title** | Unsupported | System auto generates the title of the template based on template name + username | V10 had an old feature called Form Title Editability where users could allow you to change title of live forms 1x1, however this is currently unsupported for PMv11,12 versions. |
| **Scrollbars on forms** | Provisioning > Company Settings > Disable the internal scrollbar next to forms | Applies to all PM forms with internal scrollbars. Also shows hides the “Save” icon in each section for PMv11 forms. |  |
| **Changing Text (System level words)** | Admin Tools > Text Replacement | Many system default words can be changed | Changes a apply to all forms not 1 form as these are system words, not actually form specific words |
| **Change Text (Template level words)****Custom language labels. Localization. Message Keys** | Unsupported |  | The form localization attribute msgKey is Unsupported via dynamic forms tool. |
| **Recipients of Forms/Form Targets** | Admin Tools > Template > Default Targets | Only applies to new forms launched, but allows you to change who the forms can be created for. | Options include..Self and Direct Reports – Self Only –Direct Reports Only –HR Reports Only - Self and Matrix Reports – Matrix Reports Only |
| **9-Box Matrix Grid – Changing the scales** | Admin Tools > Matrix Grid Scale | If you have Succession you have access to the Matrix Grid Scales and can change scale labels and axis. | Depending on stage of forms results may differ.Note: changing how many points exist in the scale will not apply to live forms. |
| Role Permissions |
| **Limit the ability for people with access to Detail Doc Search or Archive & Print to see all items** | Admin Tools > Template > Enforce permissioning for Detailed Document Search & Archive & Print Reporting. |  | It is rare, but at times you don’t want these 2 features to show everything as they normally would. This option applies the permissions coded on template to the person using the features |
| **You want to prevent users from seeing what happens after the form leaves them** | Admin Tools > Template > Keep last touched version upon Document completion | Immediately applies to all forms using this template | Users can only see what they saw when they last held the live form in their inbox. |
| **360 Permissions** | Please see the section below specific to options for 360 Multi-Rater forms |
| Form Transfers |
| **Lock Forms to old manager** | Admin Tools > Company Settings > Configure Change Engine | Enables you to enable forms to lock to old managers or move with manager changes | Only applies to forms after change is made. Any forms already locked will remain locked. |
| **Stop document from transferring if currently with manager** | Admin Tools > template > Do Not Transfer Documents | Immediately applies to all forms using this template | Won’t stop transfers altogether, only while form is in managers inbox. |
| **Transfer Form to New Manager** | Admin Tools > Manage Forms by User > Documents Transfer | Use this page to transfer existing documents from employee's previous manager to new manager. | You cannot select specific documents to transfer. It’s all or nothing. |
| **Other Document Transfer Options** | Admin Tools > Template > Automatic Manager Transfer options | Immediately applies to all forms using this template | Won’t undo any actions that have already occurred. |
| Form Dates & Step Dates |
| **Change Document Dates en-mass (Change Form Date)****Start Date****End Date** **Due Date** | Admin Tools > Performance > Change Document Date.Also consider the options below for controlling dates at time of launch. | Can change forms 1 x1 or also by Groups or by template. | Allows you to change the “form” start, end or due date to a specific date or extend the current date by x no. days. The “form date” is not the same as a “step date”. |
| **Form Start Date** | Admin Tools > Template > Disallow users from changing the Start Date | Immediately changes for all forms using that template. | Allow users to change this or not |
| **Form End Date** | Admin Tools > Template > Disallow users from changing the End Date | Immediately changes for all forms using that template. | Allow users to change this or not |
| **Form Due Date** | Admin Tools > Template > Disallow users from changing the Due Date | Immediately changes for all forms using that template. | Allow users to change this or not |
| [**Form**](https://salesdemo4.successfactors.com/acme?fbacme_o=admin&pess_old_admin=true&ap_param_action=doc_modrm&_s.crb=zlTP%252bEdocUi2HU6nJe0K0vlGBZ8%253d&) **Route Map/Workflow (Update)** **Change Step Due Dates** | Admin tools > Modify Form Route MapSearch by User, Form, Template | Can change 1 form at a time or batches of forms. No options beyond what is in the tool are possible. | Step dates are different to “form date” which is described above.  |
| **Due Date Validation** | Admin Tools > Template > Disable Due Date Validation | Immediately changes for all forms using that template. | If the due date validation is preventing you from launching forms it can be disabled, however it is recommended to be on for logic reasons. |
| **Remove or Show the Step Dates under the route map** | Admin Tools > Template > Display Step Start Date | Immediately applies to all forms using this template | (Unsupported for PMv12A as of B1411) |
| Goal Sections (Includes CDP and Learning Activities) |
| Notes: Goals and content in goal sections on a PM form actually come from the goal plan, and are not controlled at the PM form level but the goal plan level. Changes made on the actual goal plan template will Immediately update on all live forms. Whereas elements that are part of the PM form typically do not update live forms by default. Product Support can help determine where the change is needed.Changes made at the goal plan level may also require you run the template setting “Open&Save” to pull in changes to in-progress PM forms. |
| **Goal Plan** | Unsupported  | Changing linked goal plan | You will need to delete & relaunch |
| **Goal Fields** | Requires CCOR to change field permission, add field, remove field. |  | Fields within the goal section from a goal plan can be updated to be visible, hidden, editable, read-only.  |
| **Goals – Pull in new values from goal plan** | Admin Tools > Form templates > Open&Save | Will refresh PM form with any new data from goal plans | Must be in modify stage. Used when you import new data into goal plans that you also want to see in PM form. |
| **GM-PM Sync up** | Provisioning > Company Settings > Enable the GM-PM Sync up | Improves the sync-up logic in the instance. | We recommend customers enable this option to dynamically cause regular sync-up. Disable if this cases performance issues. |
| **Add Library Goal Button** | Automatically shows if a library is configured in the goal plan. | Need to remove linked libraries from the goal plan. | Example: <obj-library name="SuccessFactors Library"> |
| **Add Group Goal Button** | Administration > Manage Security > Administrative Privileges > User > Manage Objectives > and enable > New Add Group Objective Creation | Grant or remove the permission by person. Immediately changes for each user granted. | The feature is typically only granted to select people since they will be able to send goals to the entire company. |
| **Add Personal Goal Button** | This button can be hidden. XML change via Goal Plan | Will apply to just the goal plan modified | <switches> <switch for = “turnoff-add-personal-goal-button” value = “on” /> </switches> |
| **Turn off or Enable SMART Goal Wizard** | Admin Tools > Template > Enable SMART Goal Wizard | Immediately changes for all forms using that template. | This is helpful if your PM form template is incompatible with the fields required to make the wizard work.  |
| **Change the word “Goals” or “Objectives”** | Admin Tools > Text replacement | The word Goal or Objective can be changed via Text Replacement > $(ProvObjectives)  $(ProvObjective)  $(Provobjectives)  $(Provobjective) | This will apply system wide, not to just one goal plan or form. |
| **Change a Goal Library** | XML Change via Goal Plan | **To change the library currently linked will require an xml change via CCOR process** |  |
| **Change the word “Library”** | Admin Tools > System Properties > Text Replacement > Search for library. | **Changes the value just relative to Goal Library.** | To change the description under the Goal Button requires an xml change on the goal plan: <text-replacement for="lib-goal-btn-desc"><text lang="en\_US"><![CDATA[CUSTOM TEXT HERE]]></text></text-replacement> |
| Competencies |
| **Last Year’s Competency Ratings in PMv12 form coming from wrong template** | Admin Tools > Template > Form Template for Last Competency Ratings: | Immediately applies to all forms using this template. | Will not automatically change ratings already in all forms. Users may need to open & save their forms. |
| **Competencies Hard Coded on template** | Unsupported |  | Need to delete & relaunch |
| **Competencies individual** | Via Forms | Each person can add or delete competencies if they have the edit button | Controlled by the xml attribute configurable=true which can also be changed if needed |
| **Competency Descriptions and content** | Unsupported | Once forms go live the content pulled in is no longer dynamic | Updating the info in competency library does not update on live forms |
| Ratings and Rating Scales & Weightings |
| Notes: Ratings and weightings are integral to the form, and are often an element we cannot change as a customer may need. Data is stored in very complex ways, and not as a simple value on the form as many customers might imagine, so it is never about just changing the simple value you might see in the form. Changing simple values in forms does not update how that value is treated in reports, reporting tables, audit trails and other areas that are all part of the forms designed functionality, and therefore may result in a broken form & reports. Also values throughout the system may not be in-sync or correct in various places. We will not change values that alter the integrity of what a user had entered their ratings against as these are legal documents in an enterprise product***.*** ***Customers are reminded to pay extra attention and caution in this area before considering even the supported changes below, as it could cause negative, unexpected, and even incorrect results for some forms or all.***  |
| **Change Manual Overall Ratings on Forms** | Admin Tools > Manage Forms by User > Import Overall Scores | The ability to update the manual overall scores on a PM form through a bulk import/update performed by an administrator. | Requires forms are still in progress. Supports the update of overall scores for: PERFORMANCE, POTENTIAL, COMPETENCY, OBJECTIVE |
| **EZ Rater** | Admin Tools > Template > Show Manager Rating first for EZ Rater mode | Immediately applies to all forms using this template. | If you use EZ Rater (and not many customers do) you can use this |
| **Show Ratings as Circles in PMv12A form** | Admin Tools > Template > Display circle icon as rating | Immediately applies to all forms using this template. | Only applies to PMv12 & PMv12A |
| **Hide the Rating in Team Overview by replacing with a check mark** | Admin Tools > Template > Display check mark instead of rating in Team Overview | Immediately applies to all forms using this template. | Only applies to PMv12 & PMv12A |
| **Rating Scales with new scale** | Unsupported |  | Ratings are core to the integrity of a form and cannot be changed once live as it would fundamentally change the calculations already stored per form, which is Unsupported for live forms. |
| **Override-Unrated option true or false** | Unsupported | Change the attribute override-unrated=true/false in summary sections | This option is used to populate a manual rating based on the calculated rating if the user had not provided a rating. This prevents ratings from being “unrated” |
| Add Remove Buttons & Pods |
| **Main Toolbar Buttons/Icons at top of form** | Admin Tools > Template > Disable All Toolbar Buttons (overrides all button selections below) | Immediately applies to all forms using this template. | If a button remains that will be one not controlled by this option. |
| **Send button** | Admin Tools > Template > Disable Send button | Immediately applies to all forms using this template. | You want to prevent people from moving the form to next step. Or the SEND button is not showing and people can’t send the form forward. |
| **Send button for completed forms – Sending copies of form to others.** | Admin Tools > Template > Disable Send button for completed documents | Immediately applies to all forms using this template. | You want to enable or prevent people from sending copies of the form to others |
| **Save Button/Icon within sections on firefox** | Provisioning > Company Settings > Disable the internal scrollbar next to forms | Applies to all PM forms with internal scrollbars. Also shows hides the “Save” icon in each section for PMv11 forms. |  |
| **Add Signers Button - Enable or disable** | Admin Tools > Template > Allow Add Approver/Evaluator | Immediately applies to all forms using this template. |  |
| **Add Signers Button - Change stage people can do this at** | Admin Tools > Template > Select Add Signers UI: | Immediately applies to all forms using this template | You have 2 options that determines at what stage people can use the button |
| **Print Button** | Admin Tools > Template > Disable Print Button | Immediately applies to all forms using this template. |  |
| **Send and Open Next Form Button** | Admin Tools > Template > Disable Send and Open Next Form Button | Immediately applies to all forms using this template. |  |
| **Info button** | Admin Tools > Template > Disable Info button | Immediately applies to all forms using this template. | To prevent customers from seeing audit info they may want to hide this info button to some users for security reasons. |
| **Form button** | Admin Tools > Template > Disable Info button | Immediately applies to all forms using this template. |  |
| **PDF Print Button** | Admin Tools > Template > Disable PDF Printing | Immediately applies to all forms using this template. |  |
| **Download/Offline Edit** | Provisioning > Company Settings > Offline Form |  | Recommended to remove this from instance. |
| **Delete button** | Admin Tools > Template > Disable Delete Button.  | Immediately applies to all forms using this template. | Also consider the option “Allow Matrix Manager to Delete document if Delete button is available” |
| **Get Feedback Button** | Admin Tools > Template > Disable Ask For Comment Routing – Also Disable Ask For Edit Routing | Immediately applies to all forms using this template | Enable people to get feedback, or stop them from seeing the button |
| Workflows/Route Maps |
| **Notes:** Changing anything in Admin Tools > Manage Route Maps > ***will not update live forms***. That feature is only to design route maps pre-launch. Rather use the options below. |
| **Remove the Workflow/Route Map at top of form** | Admin Tools > Template > Show on-form workflow options as a pulldown list | Immediately applies to all forms using this template | Doesn’t remove it entirely but changes it to a dropdown list taking up less room |
| **Remove or Show the Step Dates under the route map** | Admin Tools > Template > Display Step Start Date | Immediately applies to all forms using this template | (Unsupported for PMv12A as of B1411) |
| [**Form**](https://salesdemo4.successfactors.com/acme?fbacme_o=admin&pess_old_admin=true&ap_param_action=doc_modrm&_s.crb=zlTP%252bEdocUi2HU6nJe0K0vlGBZ8%253d&) **Route Map/Workflow (NEW)** | Unsupported |  | You cannot change forms already attached to one route map to another route map |
| [**Form**](https://salesdemo4.successfactors.com/acme?fbacme_o=admin&pess_old_admin=true&ap_param_action=doc_modrm&_s.crb=zlTP%252bEdocUi2HU6nJe0K0vlGBZ8%253d&) **Route Map/Workflow (Update)** **Add a step, remove a step, change step from Iterative to Collaborative etc.** | Admin tools > Modify Form Route MapSearch by User, Form, Template | Can change 1 form at a time or batches of forms. No options beyond what is in the tool are possible. | You can change the existing route map steps in live forms. Once a route map is altered these forms will no longer be part of the original “batch/group”. |
| [**Form**](https://salesdemo4.successfactors.com/acme?fbacme_o=admin&pess_old_admin=true&ap_param_action=doc_modrm&_s.crb=zlTP%252bEdocUi2HU6nJe0K0vlGBZ8%253d&) **Route Map/Workflow (Update)** **Change Step Due Dates** | Admin tools > Modify Form Route MapSearch by User, Form, Template | Can change 1 form at a time or batches of forms. No options beyond what is in the tool are possible. | Step dates are different to “form date” which is described above.  |
| **Workflow – Disable Automatic Send Scheduler** | Admin Tools > Modify Form Route Map | You can adjust the current schedule for send on due date | If forms are not in a batch it will require manual work to change each form |
| General Form Features |
| **Enable Spell Check** | Admin Tools > Template | Immediately applies to all forms using this template. | See also Disable Spell Check On Route(can also be disabled permanently via Provisioning) |
| **Enable Legal Scan** | Admin Tools > Template | Immediately applies to all forms using this template. | See also Disable Legal Scan On Route(can also be disabled permanently via Provisioning) |
| **Enable Writing Assistant** | Admin Tools > Template | Immediately applies to all forms using this template. |  |
| **Enable or Prevent users from adding formatted text in comment boxes (RTE)** | Admin Tools > Template > Enable Rich Text Editing of Comment Fields | Immediately applies to all forms using this template. | Note, once disabled, all formatting will be lost and will not come back if enabled. PMv11 forms only. |
| **Show an alert when users paste text from word into the form** | Provisioning > Company Settings > Rich text editor gives confirmation cleanup on text pasted from MS-Word |  |  |
| **Enable form routing to previous step** | Admin Tools > Template > Enable form routing to previous step | Immediately applies to all forms using this template |  |
| **Audit Trail/Information****You want to show or hide info relative to skipped steps** | Admin Tools > Template > Display Skipped Steps in left hand side of information page | Immediately applies to all forms using this template |  |
| **Add or Remove the Progress Meter** | Admin Tools > Template > Enable Progress Meter | Immediately applies to all forms using this template |  |
| Notifications/Emails |
| **Late Notification** | Admin Tools > Template > Disable Late Notification | Turns this notification off for just this template only |  |
| **Due Notification** | Admin Tools > Template > Disable Due Notification | Turns this notification off for just this template only |  |
| **Default Due Notification** | Admin Tools > Template > Default Due Notification Date (in days) | Change the offset in days |  |
| **Default Late Notification** | Admin Tools > Template > Default Late Notification Date (in days): | Change the offset in days |  |
| **Step Exit Notification** | Admin Tools > Template > Disable Step Exit Notification | Immediately applies to all forms using this template |  |
| **All other email notifications that go out relative to forms** | Admin Tools > Company Settings > E-Mail Notification Templates Settings | Emails template management screen | This admin page offers comprehensive management of all emails the system generates, and any changes are dynamic and apply from that point forward. |
| Enroute Stage Options |
| Notes: in general nothing can be changed to a document enroute, as this is only a historical facsimile of the form as it existed when you physically had it in your inbox. Now the form has moved on to someone else what you see enroute is no longer the current version and therefore cannot be changed. |
| **Document Visibility – Hide or restore visibility.** | Admin Tools > Manage Forms By User > Manage Document Visibility  | Can remove or restore visibility to a form from a specific user. This is often used when 1 form was accidentally with the wrong person. | A better way to manage this if you always want to hide forms after a manager transfer is from **Admin Tools > Template > Advanced Settings > Hide Visibility After Document Transfer**  |
| Signature Stage Options |
| **Route From Signature Back to In-Progress** | Admin Tools > Manage Forms by User > Route Signature Stage Forms | Move forms per user. | Unsupported for PMv12 as of B1411) |
| **You don’t want to see the Signature line or vice versa** | Admin Tools > Template > Display the signature line when a signature step is skipped | Immediately applies to all forms using this template |  |
| **Show or hide the digital signatures in Document Print Preview.** | Admin Tools > Template > Show the digital signatures in Document Print Preview. | Immediately applies to all forms using this template. |  |
| **Show or Hide the step names in signature stages** | Admin Tools > Template > Show Signoff routing step names in Signoff Stage | Immediately applies to all forms using this template |  |
| **Remove the button to add signers (or enable it)** | Admin Tools > Template > Allow Add Approver/Evaluator | Immediately applies to all forms using this template. |  |
| **Add Signers. Change when people can do this** | Admin Tools > Template > Select Add Signers UI: | Immediately applies to all forms using this template | You have 2 options that determines at what stage people can use the button |
| Completed Stage Options |
| **Route From Completed Back to In-Progress** | Admin Tools > Manage Forms by User > Route Completed Forms | Move forms per user. | Unsupported for PMv12 as of B1411) |
| **Send button for Completed Forms** | Admin Tools > Template > Disable Send button for completed documents | Immediately applies to all forms using this template. | You want to prevent people from sending copies of the form to others |
| **You want to prevent users from seeing what is added to the form after it leaves them** | Admin Tools > Template > Keep last touched version upon Document completion | Immediately applies to all forms using this template | In a completed form users can only see what they saw when they last opened the form.  |
| **General changes for completed forms** | Unsupported | Forms will need to be routed back to in-progress for changes to apply |  |
| Print Options |
| **Print Button** | Admin Tools > Template > Disable Print Button | Immediately applies to all forms using this template. |  |
| **PDF Print Button** | Admin Tools > Template > Disable PDF Printing | Immediately applies to all forms using this template. |  |
| **Show or hide the digital signatures in Document Print Preview.** | Admin Tools > Template > Show the digital signatures in Document Print Preview. | Immediately applies to all forms using this template. |  |
| **Reduce the ability for people with access to Detail Doc Search or Archive & Print to see all items** | Admin Tools > Template > Enforce permissioning for Detailed Document Search & Archive & Print Reporting. |  | It is rare, but at times you don’t want these 2 features to show everything as they normally would. This option applies the permissions coded on template to the person using the features |
| **Logo not printing in PDF** | Typically cannot change on live forms |  | This happens when the logo is not stored in the SF system, but at another domain, or using an absolute URL. Can be changed only going forward. |
| **PDF Printouts – Change layout** | Unsupported |  | There is no option in standard options to edit the default layout in a PDF. WYSIWYG. You can however via paid BTS have SF build a custom pixel perfect PDF printout. |
| 360 Multi Rater **–** Options unique to a 360 form |
| Notes: Many of the options above also apply to 360 forms. The options below are just those that apply only to a 360 form and 360 reports. |
| **360 Warning Messages and Hard Stop controls** | Unsupported | Requires an xml change and a relaunch of forms |  |
| **Permission Decline to Participate Button** | Admin Tools > Template > Hide the 'decline to participate' button on the 360 form for: | Immediately applies to all forms using this template. | Roles you can permission this for: Process Owner, Manager, Employee, HR Rep., All raters, Approvers |
| **Complete/Decline a 360 for people** | Admin Tools > 360 > Complete/Decline 360 Form | Can complete or decline for a single form or mass decline |  |
| **Move a form back to in-progress** | Admin Tools > Template > Restore Completed 360 | One user form at a time, not in bulk | Requires at least 1 participant is still in-progress. |
| **Enable Automatic Change for Process Owner** | Admin Tools > Template > Automatic Process Owner Change To New Manager For In-Progress Documents When Old Manager is Process Owner (Only for 360) | Immediately applies to all forms using this template. |  |
| **Remove 360 Button** | Admin Tools > Template > 360 button | Immediately applies to all forms using this template. | When on users can search for, and copy-and-paste content from, 360 forms about the subject while using the current form |
| **Permission Send Back Button** | Admin Tools > Template > Enable Send back for: | Immediately applies to all forms using this template. | Roles you can permission this for: Process Owner, Manager, Employee, HR Rep., Approvers |
| **Permission Change for 360 Drilldown from the participant list** | Admin Tools > Template > Enable 360 Drilldown Permission for: | Immediately applies to all forms using this template. | You can enable or disable drilldown ability for these roles: Process Owner, Manager, Employee, HR Rep., Users With Detailed Reports Privilege, Approvers |
| **Permission controls for Drilldown when people send copies to others** | Admin Tools > Template > Inherit Permissions through Send Copy > 360 Drilldown Permission  | Immediately applies to all forms using this template | When people send copies of their form, you may want to restrict the access they inherit. |
| **Process Owner – Change the current Process Owner** | Admin Tools > 360 > Change 360 Process Owner | Changes the Process Owner of a specific 360 by Doc ID |  |
| **Enable Automatic Change for Process Owner When Form is Completed** | Admin Tools > Template > Automatic Process Owner Change To New Manager For Completed Documents When Old Manager is Process Owner (Only for 360) | Immediately applies to all forms using this template. |  |
| **Show Assignment Button** | Admin Tools > Template > Hide the Show Assignment button. | Immediately applies to all forms using this template. | Assignment button enables people to assign new competencies, goals etc to determine what the subject will be reviewed on. |
| **Prevent the auto decline function of the old managers form** | Admin Tools > Template > When transferring 360 documents from old manager`s inbox folder to new manager, do not auto decline old manager`s participant forms in evaluation. | Immediately applies to all forms using this template. |  |
| **Allow a person to be added back into a 360, or prevent this from happening.** | Admin Tools > Template > Allow Re-Selection of Removed Participants to Feedback Team after 360 Evaluation starts | Immediately applies to all forms using this template. |  |
| **Reduce how many 360s a manager or HR gets added to** | Admin Tools > Template > Don't display the subject's Manager and HR Rep. by default as potential participants | Immediately applies to all forms using this template. | This helps reduce all the requests a manager or HR person might get when they have lots of people reporting to them. |
| **Permission Send Reminder Button** | Admin Tools > Template > Enable Send Reminder Email for: | Immediately applies to all forms using this template. | Roles you can permission this for: Process Owner, Manager, Employee, HR Rep., Approvers |
| **Control Display Options in Graphical Summary** | Admin Tools > Template > Show Display Options in Graphical Summary View | Immediately applies to all forms using this template. | Allow users to enable or disable each option you have enabled by default in the Graphical Summary View |
| **Control what options appear in the Graphical Summary** | Admin Tools > Template > Default Display Options in Graphical Summary View: | Immediately applies to all forms using this template. | The options you can turn on or off are: Show descriptions, Show comment, Show rating labels, Show rating values, Show ranges, Show scales, Expand categories, Rank |
| **Change how anonymous participants display in the Status Summary** | Admin Tools > Template > Show Participants in Status Summary (Applicable to Anonymous 360's only) | Immediately applies to status summary using this template. | When you want to show them or hide them. |
| **Show or Hide Rating Labels in 360 Graph** | Admin Tools > Template > Display 360 graph axis rating labels | Immediately applies to all forms using this template. |  |
| **Hide names of the sender in Emails for anonymous 360’s** | Admin Tools > Template > Hide the email sender for 360 Document Complete Notification and 360 Document Reject Notification. (Only applicable for Anonymous 360). | Immediately applies to all forms using this template. |  |
| **Export the 360 details in Word XML format** | Admin Tools > Template > Enable Word XML Export | Immediately applies to all forms using this template | Typically we recommend the PDF report options, but some customers might want to get form details in word xml. |
| **Help reduce the number of 360 invitations a person might get** | Admin Tools > Template > Disallow further invitations when a user has already been invited to rate forms. | Immediately applies to all forms using this template that are still in-progress | Determine what happens with the controls > If the maximum invitations are exceeded: Don't allow – or - Display warning and allow |
| **Calibration Mode** | Admin Tools > Template > Enable Calibration Mode | Only works for competency sections in the 360 | Will not work if template not configured for <calibration-mode/> and xml cannot be changed for live forms. |
| **More granular overrides to removing forms for inactive people** | Admin Tools > Template > When the system is configured to remove documents for inactive employees, apply these overrides so that the system does not remove documents for this form template | Immediately applies to all forms using this template. | Options available unique to 360 forms are:Do Not Remove Inactive Employee's In-Progress Documents.  Do Not Remove Inactive Employee's Completed Documents.  Do Not Remove Inactive Employees' 360 Evaluation Documents  |
| 360 Participant Controls |
| **Change Participant Category** | Admin Tools > 360 > Change Participant Category | Change the category of people in a 360 form 1 person at a time. |  |
| **Hide Participant List** | Unsupported |  | A user always sees the Participant List if that user was involved in a modification step. |
| **Permission Add New Participants Button** | Admin Tools > Template > Enable Add New Participants after 360 Evaluation starts for: | Immediately applies to all forms using this template. | Roles you can permission this for: Process Owner, Manager, Employee, HR Rep., Approvers |
| **Add the new manager as a participant automatically** | Admin Tools > Template > When transferring 360 documents which are in evaluation stage, add new manager as a participant. (If new manager is a removed participant, he/she will be re-added.) | Immediately applies to all forms using this template. |  |
| **Remove or Add External Participants functionality from the instance** | Provisioning > Company id > Company Settings > Enable Use of External Raters | Will disable the function for all forms and the entire instance | Only support can change this |
| **Remove or Add External Participants functionality per template** | Admin tools > 360 Multi-Rater > Form template settings > Enable 360 add external participants | So long as 360 is in modify stage this will apply to all 360s of this template |  |
| **Automatically Remove Participants When they Become Inactive** | Admin Tools or FTP > User Import Settings > Remove Inactive Employees Completed Documents | Only applies to future employee imports and users that become inactive. | To trigger this make inactive employee active. Reimport and make sure this time to check the box. |
| **Permission Remove Participants Button** | Admin Tools > Template > Enable Remove Participants after 360 Evaluation starts for: | Immediately applies to all forms using this template. | Roles you can permission this for: Process Owner, Manager, Employee, HR Rep., Approvers |
| **Permission to Remove Default Participants per Role** | Unsupported | Requires an xml change and a relaunch | You can extend permissions for who can remove who at the xml level: EG default-rater removable="false" category="Self">  |
| **Permission to Modify Participants Button** | Unsupported for live forms | Requires xml change and a relaunch of forms | Can be hidden for certain roles at certain steps via xml |
| **Change how many raters are allowed on the form** | Unsupported | Requires an xml change and a relaunch of forms |  |
| **Permissions to control what information you can see about raters/participants** | Unsupported | Requires an xml change and a relaunch of forms |  |
| **Rename Rater Section** | Unsupported | Requires an xml change for rater-sect-name and a relaunch of forms |  |
| 360 Category Controls |
| **Change how the Category Weights are working in the 360** | Admin Tools > Template > Category Weight Setting: | Immediately applies to all forms using this template. | Options available Enable category weight normalization  Hide category weight tips in Summary View  Hide category weight legend in Detail Report |
| **Change Default Rater Categories** | Unsupported | Requires xml change for default-rater category and a relaunch |  |
| **Change Category Weight** | Unsupported | Requires xml change to cat-weight= and a relaunch |  |
| **Change Values in Category Dropdown** | Unsupported | Requires xml change and relaunch |  |
| 360 Report Controls |
| **Restrict access to when a person can access the 360 report** | Admin Tools > Template > Hide the link to the detailed 360 report in the En Route and Completed folders until all users have completed the 360. | Immediately applies to all forms using this template | Requires that all users have completed the form. However if they want to free up access they can disable this option if on. |
| **Enhanced Detailed 360 Report anonymity** | Admin Tools > Template > Enable enhanced Detailed 360 Report anonymity | Immediately applies to 360 report using forms for this template. |  |
| **Show or Hide Section Ratings in 360 report** | Admin Tools > Template > Display Section Ratings in Detailed 360 Report. | Immediately applies to 360 report using forms for this template. |  |
| **Change how Item Ratings are calculated in 360 Report** | Admin Tools > Template > Calculate the item ratings by sub-item ratings in Detailed 360 Report. | Immediately applies to all forms using this template. |  |
| **Show Ratings with Decimal Places in 360 Report** | Admin Tools > Template > Display the ratings in Detailed 360 Report with the decimal places which are set in form template. | Immediately applies to all forms using this template. | Your template might be set to use different decimal precision than the 360 Report uses by default. This makes the decimal precision seen in the report the same as coded in the form. |
| **Control Gap Analysis from Detailed 360 Report** | Admin Tools > Template > Enable Gap Analysis View from Detailed 360 Report. | Immediately applies to all forms using this template. | Enable or disable for everyone who has access to report |
| **Control Rank View from Detailed 360 Report** | Admin Tools > Template > Enable Rank View from Detailed 360 Report | Immediately applies to all forms using this template. | Enable or disable for everyone who has access to report |
| **Permission 360 report access via hardcoded template permissions as opposed to admin tools** | Admin Tools > Template > Detailed 360 Report Permission Control > and set it to “Use Form XML:” | If changed to Form Xml, access permission to the 360 report will based on what is setup in the template at time of launch | You cannot change the permissions that exist in the xml for live forms. |
| **Permission 360 report access via template UI** | Admin Tools > Template > Detailed 360 Report Permission Control > and set it to “Enable 360 Detailed Report Permission for:” | Immediately applies to the 360 reports and all forms using this template. | Roles you can enable or disable Immediately are: Process Owner, Manager, Employee, HR Rep., Users With Detailed Reports Privilege, Approvers, Manager of Employee`s Manager |
| **Restrict Access to 360 report until enough people complete** | Admin Tools > Template > Hide Detailed 360 Report link unless x no. of participants complete their forms | Immediately applies to the 360 report and all forms using this template. |  |
| **Change the information to hide in 360 reports** | Admin Tools > Template > Participants Threshold Control:Apply to Participant or Item level. | Immediately applies to 360 reports using this template. | Specifies the level of information to be excluded in 360 reports for this form. You might want to exclude responses to protect anonymity or to ensure an accurate sampling of data |
| **Disable 360 Report Button Access from Routing Bar** | Admin Tools > Template > Disable Detailed 360 Report button in routing bar. | Immediately applies to the 360 report and all forms using this template. |  |
| **Permission controls for 360 Detailed Report when people send copies to others** | Admin Tools > Template > Inherit Permissions through Send Copy > 360 Detailed Report | Immediately applies to all forms using this template | When people send copies of their form, you may want to restrict the access they inherit. |
| Compensation & VarPay Worksheets |
| Notes: Typically compensation does not allow changing anything on live worksheets at the xml level or functional feature level. You should see a warning that live worksheets exist so changes cannot be made, anytime you attempt to make a design change to the template. We do support updating data within the worksheets as described below. |
| **Column Designer Changes** | Unsupported |  | Changes only apply to new worksheets |
| **Worksheet connected to wrong PM form** | Unsupported | Correct config by mapping to new PM ID and realunch | System automatically picks up most recent PM form at time of launching worksheet. If PM form ID is hardcoded, this cannot be changed on live worksheets. |
| **Updating data in worksheet** | Admin Tools > compensation imports. You may also need to use Admin Tools > Compensation Administration > Update Compensation Forms for Template | Requires the field was created as “reloadable=true” and field is read-only. | Reloadable status cannot be changed once worksheets are live. |
| **Quickcards** | Unsupported |  | These are always show in the system for all customers. |
| **Alerts/Messages and warnings** | Unsupported | Some messages can be changed at xml level prior to launch | Many are system level messages that have no customization |
| **Start-End date of period** | Unsupported |  |  |
| **Add/Show Field Column** | Unsupported |  |  |
| **Delete/Hide Field Column** | Unsupported |  |  |
| **Reportable fields** | Unsupported |  | Changing from reportable to not reportable or vice versa is not possible |
| **Proration Variables** | Unsupported |  |  |
| **Rating Source** | Unsupported |  |  |
| **Message Keys/Localization** | Unsupported |  | We don’t support any label changes that use msgKey |
| **Worksheet Tab names** | Unsupported |  |  |
| **Add or Delete people in worksheets** | Admin Tools > Plan > Manage Worksheet > Add Employee/Delete Employee | Applies only to 1 worksheet |  |
| **Person on wrong worksheet** | Admin Tools > Plan > Manage Worksheets > Move Employee | Applies to 1 user |  |
| **Plan Setup Settings** | Unsupported | Any of the settings in this screen need to be set before the worksheets are launched. Updates will not apply to live worksheets. |  |
| **Rollup Reports** | Admin Tools > Compensation > Template Advanced Settings > Enable Roll-up Report | Immediately applies to all worksheets using this template |  |
| **Change Items Per Page** | Admin Tools > Compensation > Template Advanced Settings > Maximum Page Size | Immediately applies to all worksheets using this template |  |
| **Add or remove Youcalc widget** | Unsupported |  |  |
| **YouCalc Size** | Admin Tools > Compensation > Template Advanced Settings > Maximum YouCalc Entry Size | Immediately applies to all worksheets using this template |  |
| **Improve executive review performance** | Admin Tools > Compensation > Template Advanced Settings > Executive Review: do not automatically retrieve compensation data. | Immediately applies to all worksheets using this template | Maybe you just do not want executive review to pull in worksheet data automatically, but it’s often used when there is too much data slowing performance and don’t really need it to be dynamic on every page load. |
| **Edit completed worksheets** | Admin Tools > Compensation > Template Advanced Settings > Allow edit of completed Compensation forms | Immediately applies to all worksheets using this template |  |
| **Budget holdback** | Admin Tools > Compensation > Template Advanced Settings > Include holdback amount in planner budget | Immediately applies to all worksheets using this template |  |
| **Executive review: enable team budget view** | Admin Tools > Compensation > Template Advanced Settings > Executive review: enable team budget view | Immediately applies to all worksheets using this template |  |
| **Inline Edit for Executive Review** | Provisioning > Company Settings > Use edit-in-place for executive review edit | All executive reviews |  |
| **Offline Editing in Excel** | Provisioning > Company Settings > Enable Compensation Excel Offline Edit | System setting |  |
| **HBA** | Admin Tools > Compensation > Template Advanced Settings > Enable Compensation Hierarchy Based Approvals | Immediately applies to all worksheets using this template | Not typical to ever change mid-cycle. |
| **Hide Statements** | Go to Admin ToolsConfigure Employee Files, make sure the status of Comp or Variable Pay Statement is unchecked. | Can hide all statements to all employees immediately | Used when you want to generate a statement but hide it from employees for a time. |
| **Calculations** | Unsupported | Once set these cannot be changed on live worksheets |  |
| **Eligibility Rules** | Admin Tools > Compensation > Template Advanced Settings > Eligibility Rules > Apply | Will apply updated rules to all worksheets using this template |  |
| **Guidelines** | Unsupported | Changes only apply to new worksheets |  |
| **Budgets** | Depends on implementation | If budgets are hardcoded % of a field then it is not possible to update % on live worksheets |  |
| **Currency Conversion rates** | Admin > Compensation > Manage Currency Conversion Rate Tables | Immediately applies to all worksheets, including completed worksheets. | Use a new table for each new program to avoid accidental changes to other programs |
| **Currency Format Display** | From any page > Options Menu > Compensation Number Format | Immediately applies to all worksheets |  |
| **Set Number Format Rules (rounding & decimal precision)** | Admin Tools > Plan > Plan Setup > Set Number Format Rules | Unsupported on live forms | Changes made here only apply to new worksheets |
| **Profile: Salary Position** | Admin Tools > Text Replacement | Immediately applies to Profiles | Compa Ratio text, Range Penetration text, and section name may be customized using the text replacement admin tool. |
| **Profile: Compensation Period History View** | Admin Tools > Compensation > Actions For All Plans > Compensation Profile page and select the plan to edit > Define Compensation Period History View | Immediately applies to Profile of selected plan |  |
| **Changing Currency views: Functional Currency, Planner Currency, Local Currency** | Unsupported | Change config and relaunch worksheets. |  |
| **VarPay Program Properties Screen** | Unsupported |  | Changes to program properties apply only to new worksheets |
| **EC Integration Points** | Unsupported |  |  |
| **VarPay Goal Sections** | Unsupported |  | If not connected to the right business goal plan, this cannot be changed on live programs |
|  |  |  |  |

# XML Level Changes

## Cloud Product Support Evaluation

All of the following options require a CPS Evaluation. It is SuccessFactors firm recommendation that customers do not attempt to apply live xml changes to live production programs. Results are unpredictable due to the complexities in how data is stored across the suite, so even when a change appears to be ok on the form, it often introduces out-of-sync issues in the program.

The following options are “possible” in theory, but may not work for some customer configurations due to interdependencies of existing data within programs. ***A risk assessment must be signed by the customer before Support can proceed with a CPS evaluation***.

* XML changes should never be made to forms already completed or in a signature stage due to audit concerns.
	+ Forms should be moved to in-progress for any change to be made and then signed off again, with the exception of the options listed in the ***Signature & Completed sections*** above.
* Forms that you update may be removed from their original launch group preventing further bulk updates via admin tools.
* All forms should generally be in-progress, and even better in the same steps, as otherwise form integrity can be broken. If half your forms have one configuration, whereas half in completed do not get updated with the same changes, unexpected issues in reporting could arise. Plus, would it be correct that some users’ forms were evaluated against different criteria? These are questions for customers to consider.
* Global Product Support will make a best effort to explain the impacts a change may make, but since every instance is somewhat customized, we cannot always predict all outcomes.
* Changes made via provisioning will be approved via senior support.
* All XML changes via templates require a written change order from the customer.
* Complex or extensive changes at the xml level require a paid Professional Services engagement.

|  |  |
| --- | --- |
| **Things have disappeared when forms go to completed** |  |
| **Things have become visible when forms go to completed** |  |
| **9-Box Matrix Grid – Show/Hide** | show-9box=true/false |
| **Any Elements at xml level related to data a user inputs** | fm-element |
| **Changes to Obj/Comp Section** |  |
| **Changes to Perf/Pot Section** |  |
| **Any Elements at xml level for fm-meta data** | Only supported elements are: meta-due-date, meta-start-date, meta-end-date, rater-id-permission, button-permission, enable-previous-step-button |
| **fm-sect-config** | Many templates now leverage msgKey localization, which is Unsupported. So all elements can be changed except when they use localization which is quite common now. |
| **Employee Information Section not changing.****Want to add or remove employee information field** | Re: sync-until-completion= true/false |
| **Hide a form section or show a section to someone** |  |
| **Changes to Required Fields** | Re: fm-sect-config required-field |
| **Changes to Section Colors** | Re: section-color |
| **Section Label/Name - Title** | So long as label does not use msgKeys |
| **Comment Fields: Not laid out or showing for roles as desired** | Re: attribute cmt-opt |
| **General permission changes** | rater-id-permission, button-permission, field-permission, section-permission, action-permission |
| **Turn off the rating option in a section** | Change the no-rate=true/false flag |
| **GOALS in PM** |  |
| **Control how many goals on PM form** | Modify the attributes min-goals-required, max-goals-allowed |
| **More granular xml tags within Goal section of PM template** |  |
| **Goals – Enable or Disable Autosync** |  |
| **Goal Section – Delete** |  |
| **Enabling users to add Goals in PM form**  | Editable=false flag can be changed to editable=false/true |
| **Competencies** |  |
| **Add or remove Competency Section** |  |
| **Competency Category Filters are wrong** | Change the attribute category-filter-opt |
| **Behavior descriptions and content are changing. Making behavior content dynamic.** | lock-behavior-content |
| **More granular xml tags within Competency section** |  |
| **Ratings** |  |
| **Changing Rating Scales anywhere on form** |  |
| **Enable or disable Scale Adjusted Map** | scale-adjusted-map |
| **You don’t want a rating to show from competency or goal section in the Summary or Obj/Comp section** | in-objcomp-summ-display=true/false |
| **Enable or disable a Manual Rating option in the Summary or Obj/Comp Sections** | Change the attributes manual-rating or comp-manual-rating, obj-manual-rating, |
| **Don’t include ratings from a competency or goal section**  | in-overall-rating=true/false |
| **Remove the weighting set for the form** | If no-weight=false |
| **Prevent users from changing weights** | attribute lock-item-weights |
| **You don’t want empty sections to skew ratings** | if-no-ratings-then-ignore-section |
| **Buttons** |  |
| **Add Goal Button** | configurable=true/false flag |
| **Add Existing Goal Button** | hide-addexistinggoals-btn=true/false  |
| **Add Competency Button** | configurable=true/false flag |
| **PMv12 Pods****Overall Score Pod overall-score-pod** **Incomplete Items Pod incomplete-item-pod** **Team Rank Pod team-rank-pod** **Supporting Information Pod supporting-information-pod** **Gap Analysis Pod** | <button-permission type="none"> <role-name>E</role-name> |
| **Compensation Worksheets** |  |
| **Reloadable Field True/False** | This also needs to include readonly true/false to be set appropriately |
| **Read-only from true/false** | Needs to be adjusted depending on reloadable attribute |