Appraisals Catalog PHAP_Catalog

This is the main transaction of the application. It is here where the templates are configured.

1.- Category Group

This is defined for each application (Personnel Appraisals, SAP Learning Solution, E-Recruiting..). There, it’s possible to define:

- The object types allowed in the category group.
- Status Flow. Identify the statuses that will support the business process for performance management and hence the templates below that category. Persons to be supported for workflow as well as the available events to be implemented must be selected at this level.

2.- Category

It contains all the templates of a type. When creating a category it is possible to create it with a predefined configuration (Standard appraisal, Objective Setting, 360° Appraisal). Within a category, the following tabs are available:

- **Participants** - there the user defines the possible participants (appraisee, appraiser, part appraiser and further participants), the allowed objects for each participant and also it is possible to change the text for these participants.
- **Columns** - to select from the available columns, the ones that will be available for the template.
- **Roles** - Definition of roles available for templates in this category.
- **Value List** - Definition of value lists available for templates in this category.
- **Enhancements** - there are about 50 Badi definitions, so this makes the application very flexible for customers. Here the user defines the
enhancements that are going to be available for templates in this category.

- **Status Flow** - here you can modify the statuses and workflow events available at the category level.

### 3.- Templates

It is possible to create a template using a wizard, an example template, uploading it or manually. It corresponds to PD object **VA Appraisal Template**. Below the Appraisal template we have the following objects, **VB Criteria Group** and **VC Criterion**.

Within a template the following tabs are available:

- **Description** – just a description of the appraisal template. It is possible to include there variables (&1 and &2) using enhancement Text substitution in the Layout tab (so the customer can define his own substitution method). There are two kinds of descriptions there: standard (used in backend and when printing) and web layout (used in the browser).

- **Layout** – you determine the layout properties of the template:
  - **Numbering** - in the template how the criteria groups and criteria should be numbered.
  - **Header** - it is possible to select different options for the header of the document.
  - **Links** - to add links to further functionalities like To Qualifications, Scorecard (in case of integration with SEM)...
  - It is also possible to define Additional Data for the employee to be displayed in the header of the document, a Text substitution method, and Print and Web layouts (for all these settings the customer can create their own BADI implementations).

- **Columns** - from the available columns defined at the category level, the user should select here which columns will be available in the document, and also settings like the scale to be used, the value determination, if it is optional or required field, and also if a note should be available in the column.

  Under **Web Settings**, you can define for example, if in the web, the name of the document, the description or both should be displayed, if you want to use dropdowns or radiobuttons for the values and the lines that should be used for the notes (it’s just the lines that will be displayed in the web document).

  In **Dynamic Settings**:
  - **Fixed enhancement** - to define if new elements can be added to the document. If a fixed enhancement is selected then the document will be enhanced in a fix way. Example: add requirements of appraisee position.
  - **Free enhancement** - also to be able to create new elements, but in this case freely. The user can choose the object he/she wants to add, as for example an specific qualification from the catalogue.
  - **Refers to Attributes of** - in case a new element can be created (fixed or free), we need to define from which object this new element will take the attributes.
  - **Deletion of an element** – if it will be possible to delete an object (Criteria group or criterion) from the document and in which statuses.

- **Column access** – here, for the different columns previously allowed in the document, an owner should be defined, and then, for the relevant phases which actions should be allowed for the owner, and for the rest of participants.

- **Value Descriptions** – here you can enter enterprise-specific descriptions for your specific scales. You can also save explanations for certain values.

- **Roles** - The roles have the following aim: every part appraiser can take on a particular role in relation to the appraisee. Roles are particularly important if there are appraisal elements in a template for which you want to restrict evaluation rights.

- **Processing** – On the **Processing** tab page, you determine how documents that are based on the template are processed, and define the follow-up processing.
  - **General Settings**: In this screen area, you can activate several checks. These include the action log, permission for attachments, and so on as well as **Further Template Behavior** (here you can add further enhancement options to your template).
  - **Follow-up processing**: In this screen area, you can determine, for instance, how the qualification adjustment is performed after the final appraisal.

- **Statuses** – Define the statuses relevant for the template, the flow, and the buttons that should appear in each status (who should be able to use them, to which status/substatus the document should be moved when selecting it…). Also allows to configure the system so that e.g. an approval request is sent to the manager after an employee has entered objectives, entering a workflow event.
Main statuses are:

- In Preparation: the phase in which documents are created for employees. This can be done in an automated fashion or individually by the manager or employee.

- In Planning: the phase in which the objectives are established and agreed upon.

- In Review: the phase in which the document is left open for change to objectives.

- In Process: the phase in which all part appraisers have access to the document in order to provide feedback.

- Completed: the phase where the manager controls the closure of the document following final review and appraisal. Integration to other SAP components can occur as well as initiation of approval scenarios that have been established.

Further statuses:

- Approved
- Rejected
- Closed approved
- Closed rejected

Follow-up processes could be workflow-triggered, and be subject to an approval process where, for example, the employee (or another role) approves his or her own appraisal. In this scenario, qualification adjustments and the generation of compensation adjustments would be triggered after approval.

The BAdI Appraisal Document - Alternative for Status Names (HRHAP00_DOC_STATNAME) allows you to define customer status names reflecting the customer process. Also customer can defined their own customer statuses.

5.- Criteria Group/Criterion (objects VB and VC)

Tabs Description, Columns and Value Description are the same as at Template level.

Remark: under Columns tab, area Objective Settings, there is a check box Free input. This is available if OBJ0 column (Objective Setting) is selected. It is possible to set that the short text of a Criteria Group or a Criterion can be entered as a free entry (so, for example, the objective can be defined at the planning phase by the appraiser and the appraisee).

There is also a new tab available:
**Element Access** – Determines the access a participant should have to the element based on type of participant and the participant’s role. The settings in the Element Access group box control element access during the processing phase of the main appraisal document. The settings in the Element Access for Part Appraisers group box control the access authorizations of part appraisers when they process the part appraisal document. If it is defined in the appraisal template that no part appraisers are to take part in the appraisal process, the Element Access for Part Appraisers group box is not shown.