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# Introduction:

**Please download the official PM Admin & Implementation Guide. You should refer to that document for all available options. This document is supplemental that that.** [**http://help.sap.com/cloud4hr**](http://help.sap.com/cloud4hr)

## 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.

# Changes Possible via Admin Tools or Provisioning

These typically apply to new and LIVE forms unless otherwise stated.

|  |  |  |  |
| --- | --- | --- | --- |
| 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** | You can’t change the actual xml level message key, you can only import a new label via admin tools. |  | 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. |
| 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 Map Search 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 Map Search 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 Map Search 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 | Reject button ability. (controls enable-previous-step-button) |
| **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. |

# XML Level Changes for LIVE PM forms.

## Cloud Product Support Evaluation

* We do not support XML level changes for LIVE PM forms. Exceptions to this rule are rare as they put existing program integrity at risk. Most are not technically possible.
* Options listed below will require a delete and relaunch of your forms after adjusting the master template via our [**Change Order (CCOR)**](https://launchpad.support.sap.com/#notes/2090216) Process:
* ***A risk assessment must be signed by the customer before Support can proceed with a CPS evaluation***.
* XML changes can only be made via approved PS engineers.

|  |  |
| --- | --- |
| **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 |
| **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 |

# 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.