Administrator Functions

The Administrator has the ability to create the periods, categories, participant roles, participant assessments, create evaluations and adding participants. Employee Evaluation mappings can be imported by the Administrator or the auto-mapping functionality can also be done.

The following sections will explain the above-mentioned functions.

5.1.1 Periods

The evaluation period can be defined as the period that evaluations needs to be completed. Overlapping periods are allowed. Each period has specific setup that can be specified. Only one period can be active at a time where the setup can be done.

A new period can be created for the evaluation period. The evaluations for the participants will only show during the active period. The list of all periods are displayed and only one period at a time can be active. The Active Period is the one you use for all the setup.



A new period can be created. The following fields needs to be completed:

- Name of the period - Unique Name for this period.
- Start Date - The date that the period starts and evaluations are available to participants.
- End Date - The date that the period ends and closes.
- Max Mappings per Participant - The maximum number that a participant can be mapped for this period.
- Questionnaire Landing Page Instructions - Details included in the Questionnaire Landing Page Instruction field will be displayed on the Questionnaire Landing Page.
- Period Email Description - The Period Email Description will be displayed in the email sent to the participant.
- Lock after Completed - This setting will prevent participants from making any changes once the entire evaluation has been completed.



5.1.2 Categories

A category can be defined as a grouping of evaluations to which an employee to be evaluated can be linked to. An example is Supervisory Categories and Non-supervisory Categories.

Categories are to be linked to periods and assessments. New categories can be added and the name and a description can be specified.



5.1.3 Participant Roles

A participant role can be defined as the role in which a participant will evaluate an employee. The most used roles are:

- Manager
- Self
- Colleagues / Peers
- Subordinates / Stakeholders

These roles can be setup to be auto mapped and whether this role's score are included in the overall evaluation score used for Performance Management.

When creating a participant role, the following can be specified to that particular role:

- Include this role's score in the overall evaluation score - This score will be included in Performance Management Module.
- Is included for Auto Mapping - This role will be included when the auto mapping functionality is used.
- Auto Mapping Type:
  - **Self**: The employee being evaluated, will be mapped to him-/herself (Can only have 1 mapping)
  - **Manager Type**: Only the employee’s Performance Manager will be mapped (Will only have 1 mapping)

    - **Subordinates**: Only applicable if a Performance Manager is evaluated: Only employees reporting to the selected PM manager, will be mapped.
    - **Subgroup**: Random employees in the selected subgroup, equal to the number of mappings, will be mapped as participants
- Auto Mapping Rules:
    - Only managers / employees employed in a **primary** position, that is active during the selected period, can be mapped.
    - Auto mapping can only be applied when **no participants** have been linked to an Employee Being Evaluated.
    - **Participants** will only be mapped if they haven’t reached their maximum number of evaluations
    - If no employees are found for the conditions specified below, no participants will be mapped for the specific type.



5.1.3.1 Typical Participant Roles

5.1.3.1.1 Colleagues

An example of the setup for a colleague:



5.1.3.1.2 Manager

An example of the setup for a manager:



5.1.3.1.3 Self

An example of the setup for self:



5.1.3.1.4 Subordinate

An example of the setup for a subordinate:



5.1.4 Participant Assessments

A participant assessment can be defined as the grouping per period, assessment, category and participant role.

In other words, a participant is linked to a period, an assessment, category and participant role.

A participant assessment needs to be created per participant role. The assessment is built in the Assessment Builder module. (Please refer to the manual for more details)



5.1.5 Employees to be Evaluated

A list of employees that needs to be evaluation for a specific category and period.



Once the employees to be evaluated has been identified, the participants can be manually or auto mapped. The participants are mapped as follow:



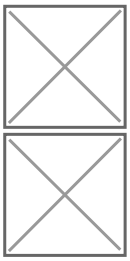
5.1.5.1 Manually create a participant

By selecting the "Create New Participant" button, a list of participants will display for selection.



5.1.5.2 Auto Map Participants

By selecting the "Auto map participants" link, the participants will be mapped according to the rules of the periods and participant roles.



5.1.6 Employees evaluating others

The participants who is evaluating employees.

The list of participants are managed individually. New participant evaluations can be created from this page and notifications can be sent.

An evaluation linked to a participant can be deleted at any time.



5.1.6.1 Create New Participant Evaluation

By selecting the "Create New Participant Evaluation" button, the participant, role and employee to evaluate are selected from lists.



5.1.6.2 View Participant Evaluation

A participant's evaluations are viewed and from here more evaluations can be added as well. A new evaluation can be added from here as well for a specific participant.



5.1.6.2.1 Create New Participant Evaluation

When creating a new participant evaluation, the role and employee to evaluate are selected from lists.



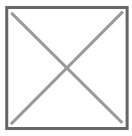
5.1.6.3 Sending Notifications

Notifications are sent from the system to notify a participant that he needs to evaluate employees. These email notifications are sent either for all participants at once or it can be sent to an individual participant.



5.1.7 Job Title Exclusions

These exclusions are applicable to participant when using the auto-mapping function or manually mapping participants.



By selecting the "Link/De-link Job Titles to Exclude" button, a list of job titles will be displayed and job titles can be linked in the exclusion list or de-linked in order to be mapped again.



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