

Performance Management

- [How to Create a New Agreement Template](#)

How to Create a New Agreement Template

How to get there?

Click System Administration (1), then with your cursor hover over Modules (2) | Click on Performance Management (3) | With your cursor hover over Administration (4) | Click on Templates (5).

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What to do?

Adding a new agreement template

- Click on Add (1) to add a new Agreement Template.

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- Enter the Name (2) of the template you want to create.
- From the drop down select the template Review Frequency (3).
- Click on Continue (4).

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IMPORTANT: Careful consideration must be made before selecting or unselecting the tick box in the step below:

- *Include this Review Period's rating in the score calculation (6).*

Once this setting is saved you **WILL NOT BE ABLE TO CHANGE** this setting. You will have to delete the Agreement and start from scratch.

- Select a Description (5) for your review period.
- Tick or Untick the tick box Include this Review Period's rating in the score calculation (6).
- Click on Continue (7).

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Adding perspectives, themes and objectives

- Ensure that all the main categories Weights(%) (8) add up to 100%.
- Click on Change (9) to edit the Weights.
- Enter the Weight(%) (10) and ensure they add up to 100%. You will not be able to save if the Weights do not add up to 100%.
- Click on Save (11).
- Click on the Add new Perspective (12) / (13) to add perspectives to KPA's or Stretch Targets.
- Click on Add New Development Objectives (14) to add objectives to Key Competency.

For this example we will only be adding perspectives to KPA's. Kindly click on Add new Perspective (12).



Manage this Review Period Template

Template Details

Template Name *

Publish Template

Actions

- [Add New Perspective](#)
- [Add New Development Objectives](#)
- [Add Stretch Targets Perspective](#)

• [Edit Mid Year Review](#)

[Save](#) [Delete](#) [Back](#)

Key Performance Area	Add New Perspective 12	Weight(%) 60.00 change 9
Stretch Targets	Add New Perspective 13	Weight(%) 10.00 Cancel 10
Values and Behaviours		Weight(%) 10.00 Change 8
Leadership Behaviours <small>Applicable only to People Managers</small>		Weight(%) 10.00 Change
Key Competency	Add New Development Objectives 14	Weight(%) 10.00 Change

11 [Save](#) [Delete](#) [Back](#)

- From the Perspective Drop Down (15) select the Perspective.
- Enter the Weight (16).
- Click on Save (17).
- Click on Save Add New (18) if you would like to add another Perspective.
- Click on Close (19) when you are done.

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- Ensure the Perspectives added, add up to 100% (20).
- Click on Edit (21) to change the weights per Perspective.
- The next step is click on Add Theme (20).

Actions

- [Add New Perspective](#)
- [Add New Development Objectives](#)
- [Add Stretch Targets Perspective](#)

• [Edit Mid Year Review](#) • [Print Performance Year](#)

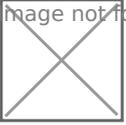
[Save](#) [Delete](#) [Back](#)

Perspective	Theme	Objective	Action	Delete
Customer Services	Add Theme -> 50.00% 22	Please complete this item.	View More	<input type="checkbox"/>
Finance	Add Theme -> 50.00% 20	Please complete this item.	View More	<input type="checkbox"/>
total 100.00%				

- Click on the Hand Icon (23) to select Themes from the database.

- You can also enter the the Theme in the text box (24) if your theme is not in the database.
- Enter the Weight (25) for the theme.
- Click on Save (26).
- Click on Save Add New (27) if you would like to add another Theme.
- Click on Close (28) when you are done.

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- Ensure the Themes added, add up to 100% (29) / (30) for each Perspective.
- Click on Edit (31) to change the weights per Theme.
- The next step is click on Add Objective (32).

Key Performance Area		Add New Perspective		Weight(%)	100.00	Change		
Perspective		Theme		Objective			Action	Delete
Customer Services	Edit Add Theme -> 50.00%	Client Service	Edit Add Objective -> 20.00%	Please complete this item.			View More	<input type="checkbox"/>
		Growth	Edit Add Objective -> 80.00% Total 100.00%	Please complete this item.			View More	<input type="checkbox"/>
Finance	Edit Add Theme -> 50.00% Total 100.00%	Effective Administration	Edit Add Objective -> 60.00%	Please complete this item.			View More	<input type="checkbox"/>
		Innovation	Edit Add Objective -> 40.00% Total 100.00%	Please complete this item.			View More	<input type="checkbox"/>

- Enter an Objective in the text box (33) or click on the Hand Icon (34) to select an Objective from the database.
- Enter the Measures (35) for the Objective.
- Enter the Rating Scale (36).
- Enter the Weight (37).
- Select a Due Date (38).
- Click on Save And Close (39).
- Click on Save Add New (40) if you would like to add another Objective.

Objective

Details regarding a Objective.

Perspective	Customer Services
Theme	Client Service
Item Number *	<input type="text" value="1"/>
Objective *	<input type="text" value="Acurately capture information receive from various sources on the relevant systems daily on a daily basis"/>  34
Measures	<input type="text" value="How many of the documents were captured accurately"/>  35
Rating Scale	<input type="text" value="1 = 0%-20%
2 = 20%-40%
3 = 40%-60%"/>  36
Weight *	<input type="text" value="100"/> 37
Due Date	<input type="text" value="2019/06/30"/>  38

39

40

- Ensure the Objectives added, add up to 100% (41) / (42) / (43) / (44) for each Theme.
- Click on Edit (45) to change the weights per Objective.

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Note: Before Publishing the template ensure there are no **RED** text on the page and all the percentages are **GREEN**.

- When the Agreement is complete and you would like the Publish the template. Click on the Publish Template tick box (46).
- Then click on the Save (47) button.

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More Information

To delete a Theme click on the Delete tick box (48), then select the Delete button (49).

Perspective	Theme	Objective	Action	Delete
Customer Services	Client Service	Accurately capture information receive from various sources on the relevant systems daily on a daily basis	View More	<input checked="" type="checkbox"/>
	Growth	Classify all calls on relevant systems	View More	<input type="checkbox"/>

To add a document click on the Folder Icon (50), then click on Add Document (51).

Document Path: Regional Manager Contract | Key Performance Area | Customer Services | Client Service | Accurately capture information receive from various sources on the relevant systems daily on a daily basis

+ Add Document (51)

No results found for your current search criteria.

Close

Action	Delete
View More	<input checked="" type="checkbox"/>
View More	<input type="checkbox"/>
View More	<input type="checkbox"/>

Enter a Description (52) and select your document (53), then click on Close (54).

