Performance Management

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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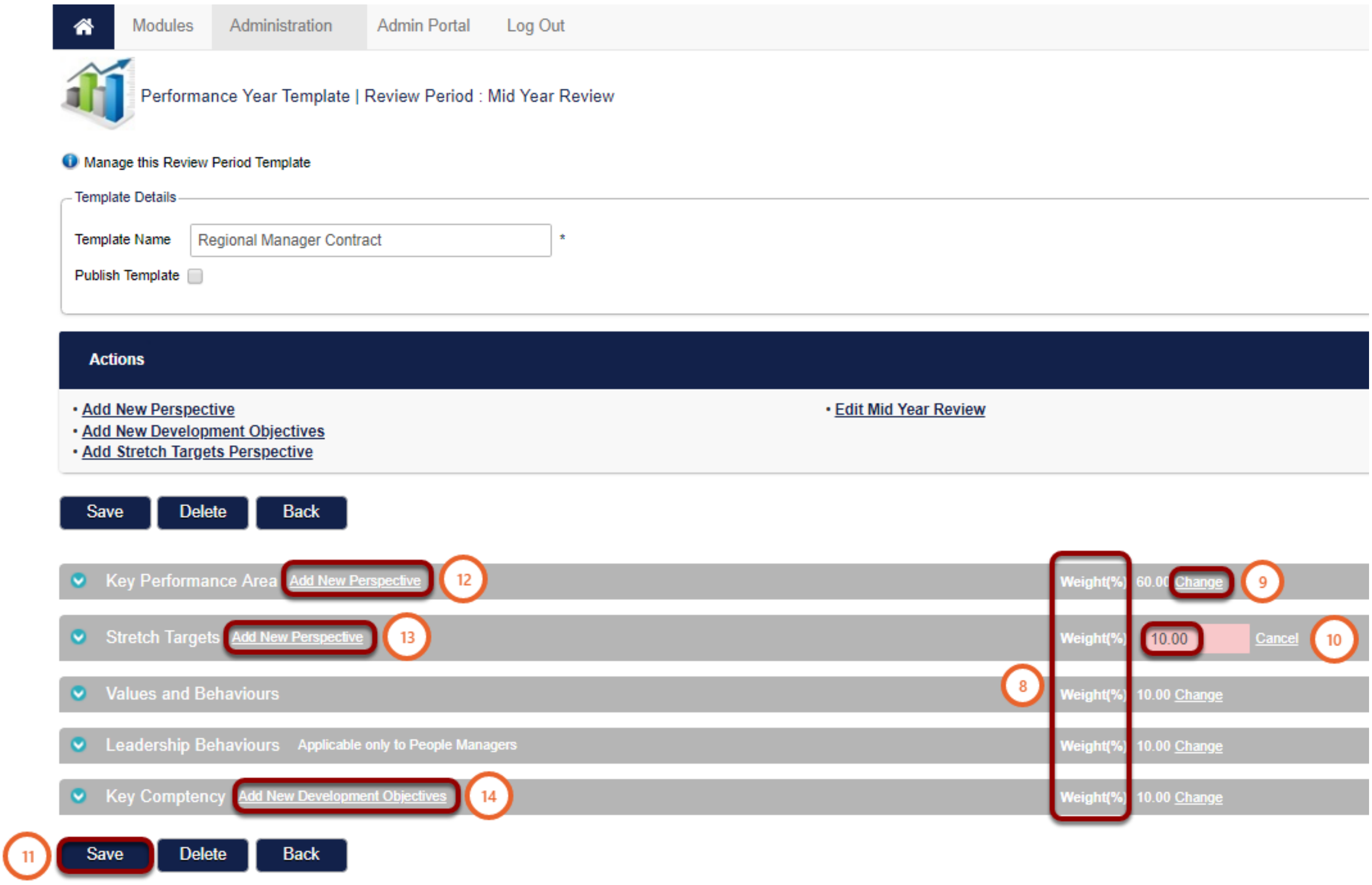
Adding perspectives, themes and objectives

- 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).



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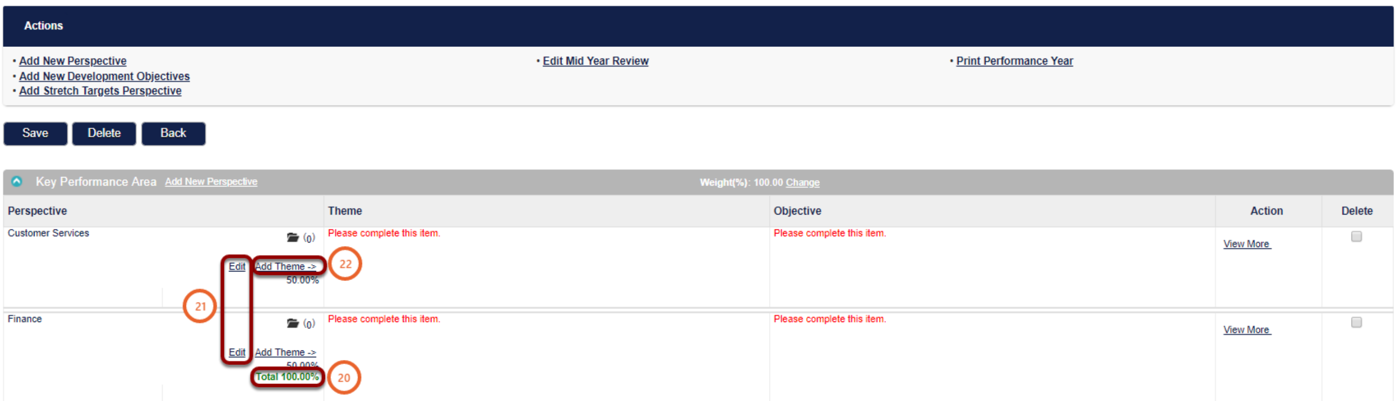
- Ensure the Perspectives added, add up to 100% (20).
- Click on Edit (21) to change the weights per Perspective.
- The next step is click on Add Theme (20).



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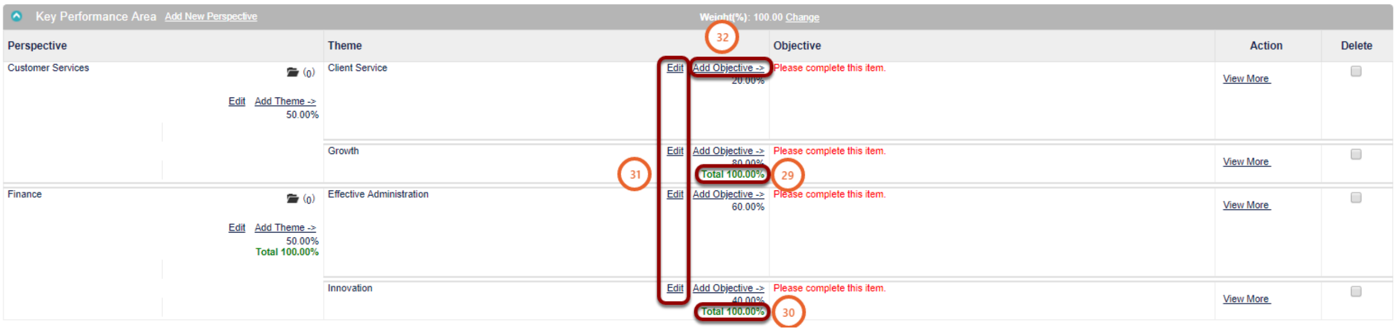
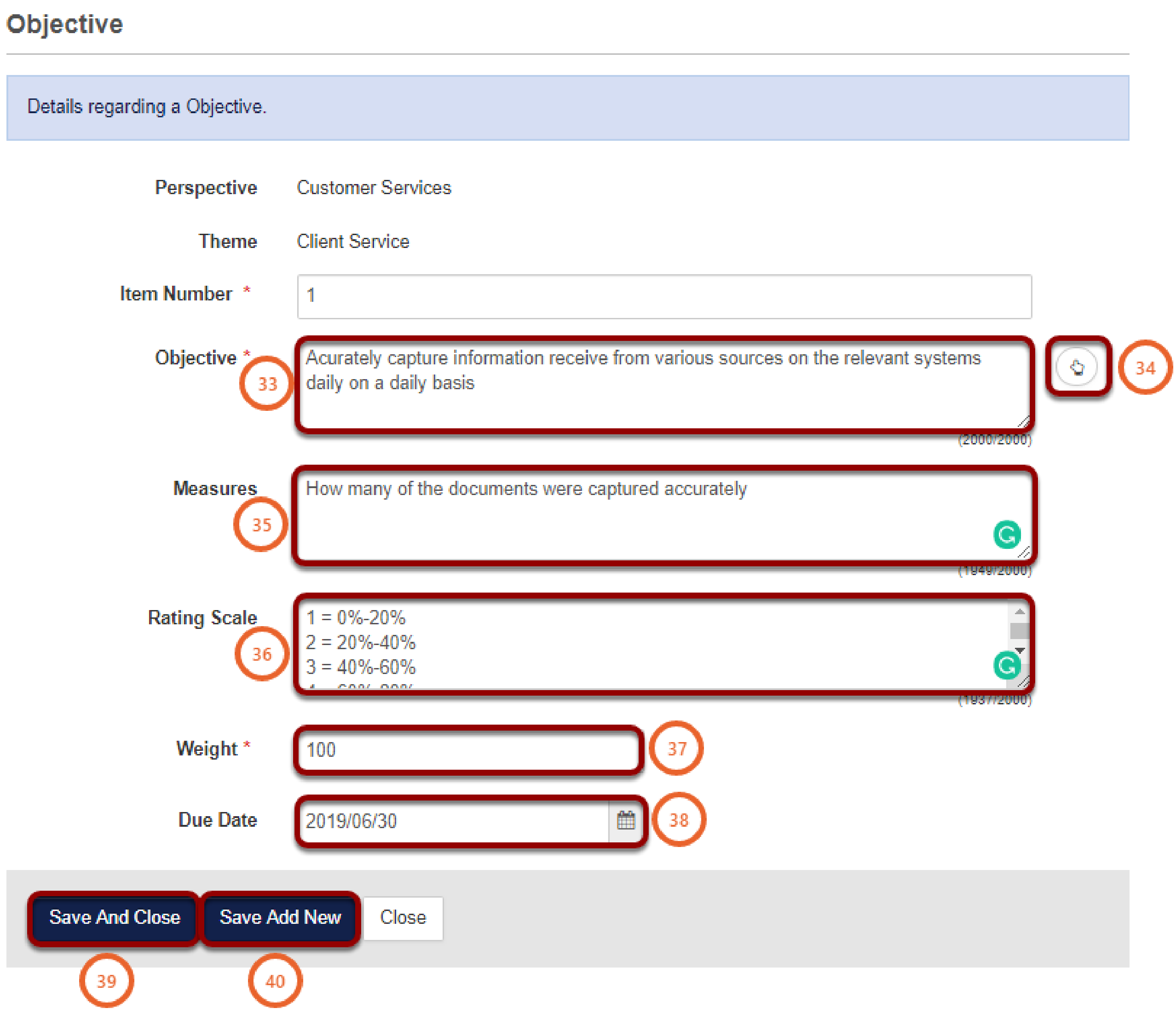
- Ensure the Themes added, add up to 100% (29) / (30) for each Perspective.
- Click on Edit (31) to change the weights per Theme.
- The next step is click on Add Objective (32).



- 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.



- 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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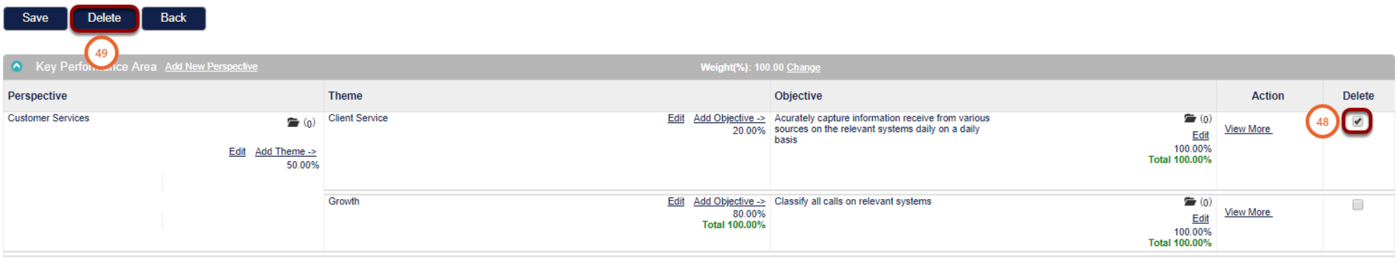
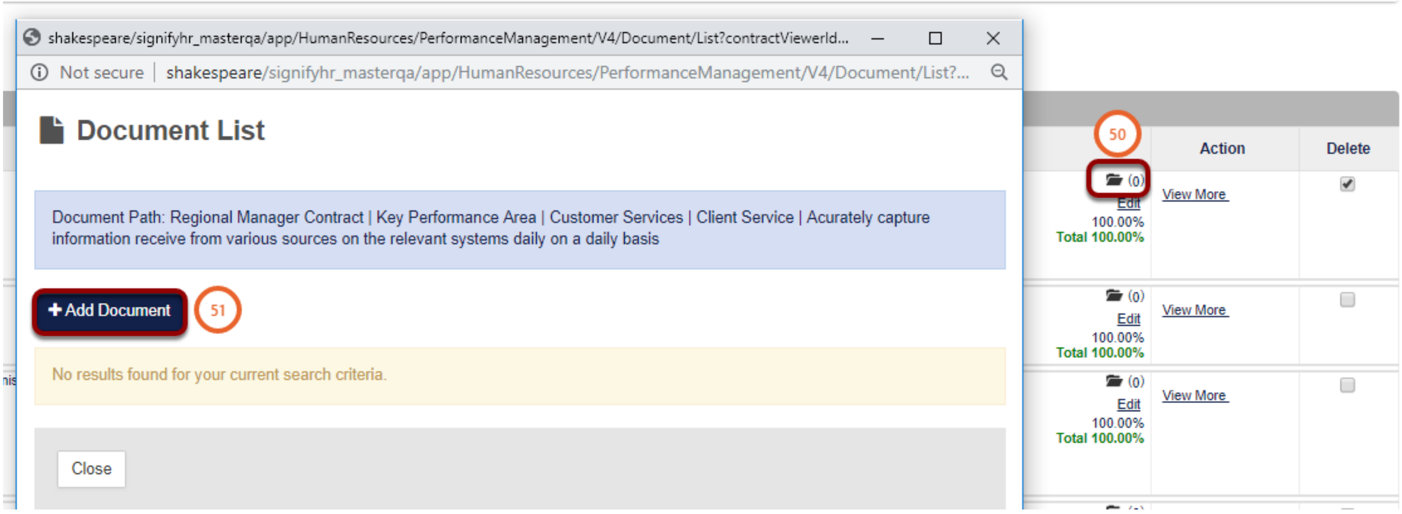
More Information

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



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



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