Administrator: PM Master Data and Templates

How to setup PM Master Data

In the previous chapters we learned how the Performance Management Contract process works from the Manager and Employee's perspective.

The creation and setup of the Performance Management master data can be accessed by the System Administrator.

How did I get here?

• *From the portal, click - System Administration | Modules | Performance Management*

What can I expect in this section?

• How to view, create and modify the Performance Management master data.

How to Access the Performance Management Master Data

How to Access the Performance Management Master Data
Login to the Signify HR system. From the Home page navigate to the System Administration | *Modules | Performance Management*

The following Performance Management master data is available under the **Administration** menu and will be discussed in the following articles:

- Performance Years,
- Review Frequencies,
- Review Periods,
- Contract Weight Items,
- Review Frequency Sections,
- Key Performance Areas,
- Key Performance Indicators,
- Rating Scales,
- Manage Final Scores,
- Employee Review Frequencies,
- Perspectives,
- Leadership Behaviours,
- Review Periods Exclusion Reason,
- Employee/Manager Instructions, and
- Templates.

Working with the Performance Years Library

Working with the Performance Years Library

The year period for which performance contracts will be created can be managed on this screen. The **Add** button and **Edit** Icon will redirect you to the screen below. Records can only be deleted if not already in use.

Add and Edit Performance Years Library

Add and Edit Performance Years Library

When a PM contract is marked as **inactive**, it will not be available for selection when working with contracts in the PM module.

Working with the Review Frequencies Library

Working with the Review Frequencies Library

Review frequencies are the number of performance assessments within a performance year. The most common review frequencies are Annual, Bi-Annual and Quarterly.

The **Add** button and **Edit** Icon will redirect you to the screen below. Records can only be deleted if not already in use.

Add and Edit Review Frequencies

Add and Edit Review Frequencies

Working with the Review Periods Library

Working with the Review Periods Library
Review periods are setup per review frequency. (Example for Bi-Annual: First semester, second semester etc.)

The **Add** button and **View/Edit** hyperlink will redirect you to the screen below. Records can only be deleted if not already in use.

Add and Edit Review Period Details

Add and Edit Review Period Details

Working with the Contract Weight Items Library

Working with the Contract Weight Items Library
Contract weight items are additional contract items that can form part of an employee's total contract score. Example is a 360 Survey.

The **Edit** icon will redirect you to the screen below. Records can only be deleted if not already in use.

The assumption is that the performance agreement automatically gets a weighting of 100% - unless one or more additional contract weight items are added. In the example above the 360 review has a weight of 50%, thus automatically setting the performance agreement weight to 50% (100% - 50%) as well.

Add and Edit Contract Weight Items

Add and Edit Contract Weight Items

Working with the Performance Agreement Section Library

Working with the Performance Agreement Section Library
The different sections available on a performance agreement are listed. The weight distribution per section can be adjusted here as well as the preferred company terminology of each section.

Working with the Key Performance Areas Library

Working with the Key Performance Areas Library
Key Performance Areas and Stretch Targets:

- KPA's are the overall scope of activities that an individual has to perform in his job role.
- Stretch targets are challenging but realistic targets that force us to “stretch” our capabilities beyond our usual performance.

The **Add** button and **Edit** link will enable you to enter a description and to indicate if the KPA is to be published. When a KPA is not published, it will not be available for selection when working with a performance contract. Records can only be deleted if not already in use.

Note: As employees prefer to type up new KPA's (and not selecting existing ones from the library), the new KPA is also added to the library but in an unpublished state. The PM system administrator is welcome to sporadically consider any unpublished items and publish them, thus making them available to all system users.

Working with the Key Performance Indicator Library

Working with the Key Performance Indicator Library
KPI's are the type of performance measurement that acts as a compass, helping you understand how you are performing towards some strategic goals. To be effective, a KPI must be well-defined, quantifiable and be crucial to achieving your goal.

The **Add** button and **Edit** icon will enable you to enter a description and to indicate if the KPI is to be published. When a KPI is not published, it will not be available for selection when working with a performance contract. Records can only be deleted if not already in use.

Note: As employees prefer to type up new KPI's (and not selecting existing ones from the library), the new KPI is also added to the library but in an unpublished state. The PM system administrator is welcome to sporadically consider any unpublished items and publish them, thus making them available to all system users.

Working with the Rating Scales Library

Working with the Rating Scales Library
In the performance management module, a rating scale is a numeric method in which its options represent degrees of a particular characteristic. In this case when a performance competency is scored.

The **Edit** icon will redirect you to the screen below. Records can only be deleted if not already in use.

Add and Edit Rating Scales

Add and Edit Rating Scales

Working with the Perspectives Library

Working with the Perspectives Library
Perspectives can be used for reporting purposes and to categorise KPA’s and stretch targets into smaller groups.

The **View/Edit** link will enable you to enter a description and sort order for perspectives. Perspectives closely correspond to the use of the balanced scorecard pillars.

Working with the Leadership Behaviours Library

Working with the Leadership Behaviours Library
Leadership behaviours are components in a performance agreement only available to employees in a leadership position.

The **View/Edit** link will enable you to enter a description and sort order for leadership behaviours. Records can only be deleted if not already in use.

How to Change Employee Review Frequencies

How to Change Employee Review Frequencies
An employee's contract review frequency can be changed with this functionality. This is usually needed in case a contract was initially created with the wrong review frequency. Review frequencies can only be changed from a lower to a higher frequency e.g. from annual to bi-annual, or from bi-annual to quarterly.

The **View/Edit** hyperlink will redirect you to the screen below.

Edit an Employee's Review Frequency

Edit an Employee's Review Frequency

Working with the Review Periods Exclusion Reason Library

Working with the Review Periods Exclusion Reason Library
A predefined list with reasons why a review period is to be excluded from an assessment.

Working with PM Contract Instructions

Working with PM Contract Instructions
The instructions that are visible on the Performance Management Contract screen can be managed here. Instructions can be provided for both the content and scoring phases, and from the perspective of employee and manager.

Working with PM Templates

In the previous chapters we learned how the Performance Management Contract process works from the Manager and Employee's perspective.

We've also learned how an Administrator can create and setup Performance Management master data.

In this section you will learn how to create Performance Management Templates that can be used when creating an employee's PM contract.

How did I get here?

• *From the portal, click* **-** *System Administration | Modules | Performance Management*

What can I expect in this section?

• How to view, create and modify a Performance Management Template.

How to Access the Performance Management Templates

How to Access the Performance Management Templates
Login to the Signify HR system. From the Home page navigate to the System Administration | *Modules* | *Performance Management*

In the Administration menu, click on **Templates.**

View a List of Templates

View a List of Templates
A list of existing templates is displayed.

To view or edit an existing template, click on **View/Edit** and continue with the section "How to Edit an Existing Template" below.

How to Add a New Template

How to Add a New Template
Click on the **Add** button on the Template list screen. Enter the template name and review frequency and click **Continue**.



Enter the review period description and indicate if this review period's rating should be included in the score calculation. Click **Continue**.

How to Edit an Existing Template

How to Edit an Existing Template
Click on the **View/Edit** link of the Assessment Period to open the template detail screen discussed in the next article.

How to Manage a Review Period Template

How to Manage a Review Period TemplateZoom: How to Manage a Review Period Template

The following links are available in the Actions Toolbox:

- **Edit Assessment Period**: This functionality gives you the opportunity to change the Assessment Period Detail.
- **Print Performance Year**: View/Print the Template contents.
- **Add New Perspective:** New KPA's can be added to the template.
- **Add New Key Competency:** New Key Competencies can be added to the template.
- **Add New Stretch Target Perspective:** New Stretch Targets KPA's can be added to the template.

The template contains all the sections necessary to manage a performance contract i.e.

- Key Performance Areas,
- Stretch Targets,
- Company Values and Behaviours,
- Leadership Behaviours and
- Key Competencies.

A checkbox indicates if the template should be published, meaning the template will be made available to copy from, when a new PM contract is created for an employee.

From here the steps to manage a template are the same as discussed in the previous articles.

How to Add a Key Performance Area

Click on the **Add New Key Performance Area** link





Enter the a new KPA description or select from the KPA library. Enter the weight for the KPA.

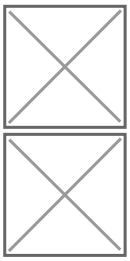
Click **Save an Close** to return to previous screen or **Save Add New** to add another KPA.

Note: The total percentage of all the KPA's weights should be 100%.

The text marked in **red** indicates that this section is still to be completed or the weights do not add up to 100%.

How to Add a Key Performance Indicator

Click on the **Add Key Performance Indicator** link next to the KPA you are working with.



Enter the a new KPI description or select from the KPI library. Enter the measures, rating scale and weight for the KPI.

Click **Save an Close** to return to previous screen or **Save Add New** to add another KPI.

Note: The total percentage of all the KPI's weights for each KPA, should be 100%.

The text marked in **red** indicates that this section is still to be completed or the weights do not add up to 100%.



How to Delete a Key Performance Indicator

Select the check box in the row you want to delete. Click on the **Delete** button.



How to Delete a PM Template

Open the Performance Agreement Template List

Select the check box in the row you want to delete. Click on the **Delete** button.



How to Change the Section Weights

Click on the **Change** link in the heading for the different sections.

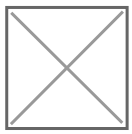
Note: The total percentage of all the Section weights should be 100% before the template will be saved successfully.



How to Print a PM Template

Open the Performance Agreement Template List

Click on the **Print** link next to the template you want to print.



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