Chapter 3: Product setup and administration
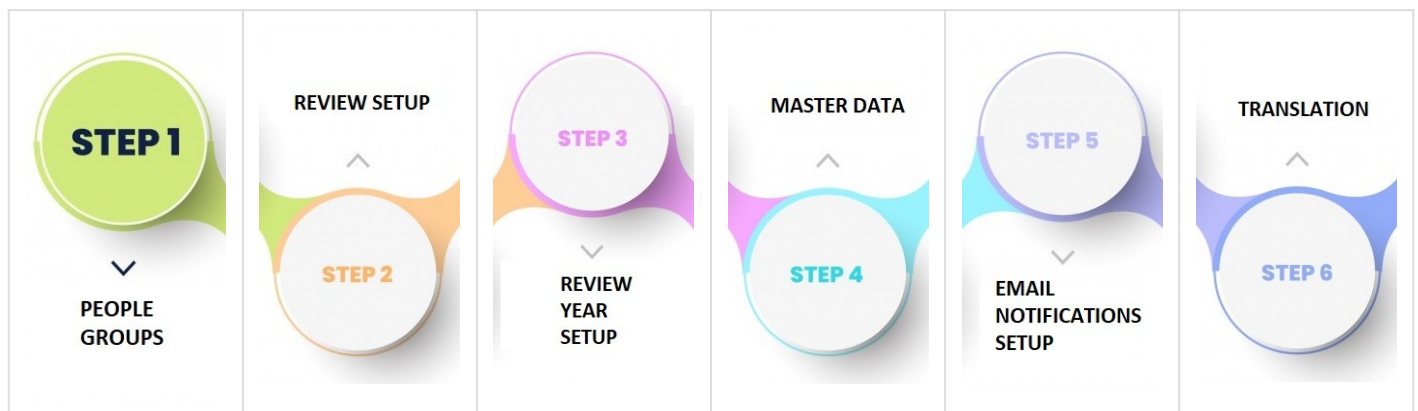
- Performance Management Product Setup and Configuration

Performance Management Product Setup and Configuration

Diagram for Performance Management Setup

The diagram below shows the steps to configure the Performance Management Product. Click on the step images in the diagram for easy access to the sections in the document.

Note: Only steps 1 to 4 is mandatory for the Performance Management Product setup.

Summary of the Product Setup:

- Create a **People Group** as the target audience for the product
- Do the Performance Management configuration
    - How to access the Product Configuration pages
    - How to create **Review Setups**
    - How to create a **Review Year** and link the Review Setup(s)
- Populate Performance Management **master data**
- Customise Performance Management **email notifications**
- Customise **system terminology and messages** using the Translation Module
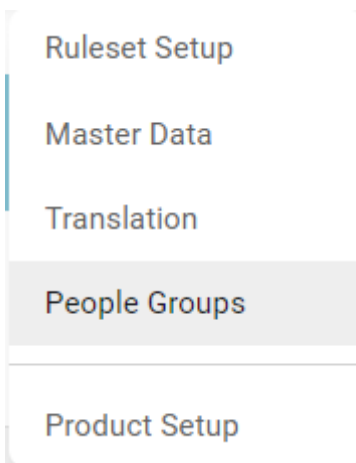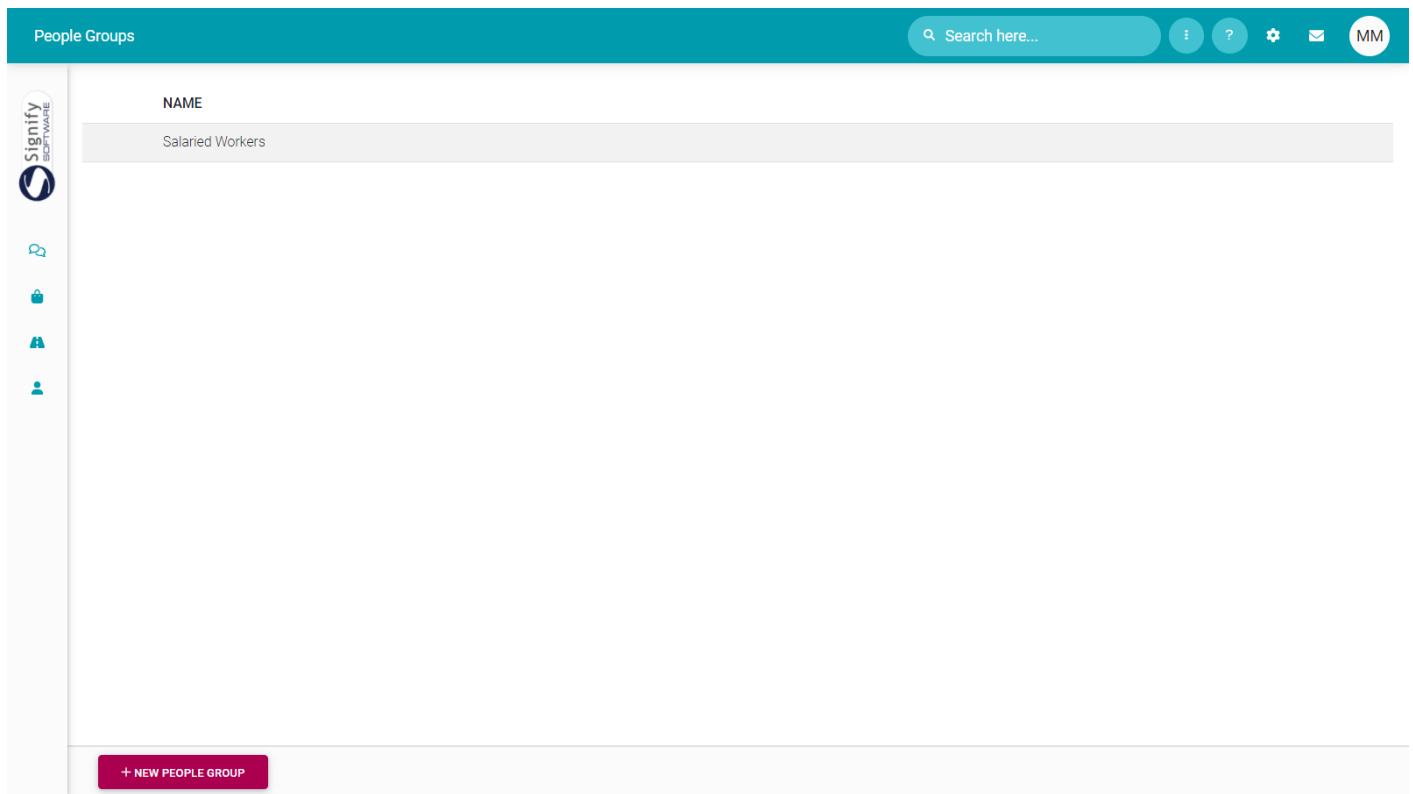
PEOPLE GROUPS

The management of performance does not always apply to all employees in a company. Use the following steps to define your target audience. In the following section you will be required to link the target audience to a performance year.
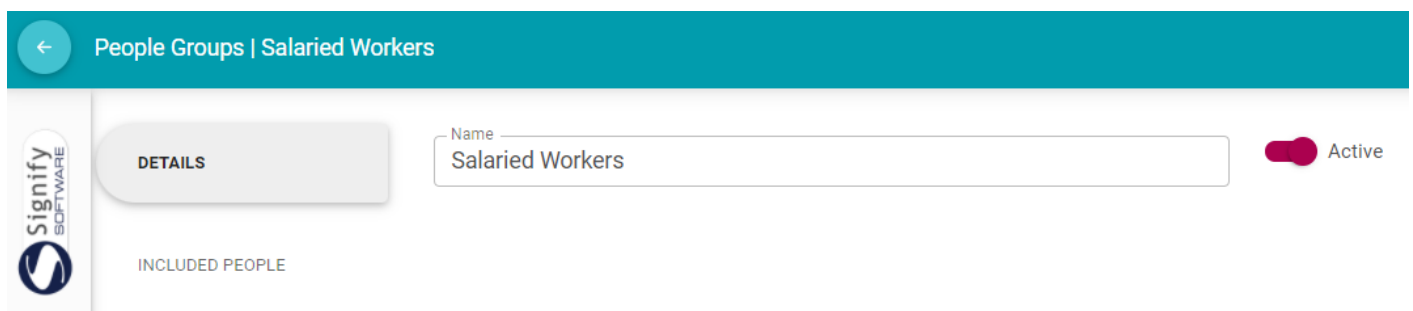
- From the System Settings menu, select **People Groups**.

- Click **+NEW PEOPLE GROUP** to add a new People Group. Name it appropriately.

- Activate the group when ready - probably only after adding all relevant people.

- Click **(LINK) PEOPLE** to link people from the HR database to become the product's target audience.

DETAILS

INCLUDED PEOPLE

ⓘ People selected in this condition will always form part of the People Group.

🔗 PEOPLE

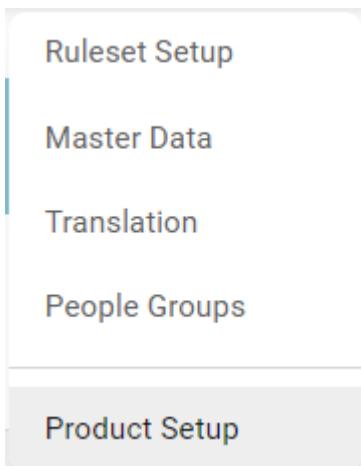| PERSON	JOB TITLE
Ariffa Dawood(AZ0242)	Creditors Clerk
Angela Hall(AD0004)	Financial Manager
Joao De Sousa(AD0155)	Group Financial Director
Leandri Aucamp(SZ006)	Assistant Accountant
Jolanda Brustle(SZ007)	Payroll Administrator
Marlize Fourie(SZ003)	Group HR Executive

REVIEW SETUP

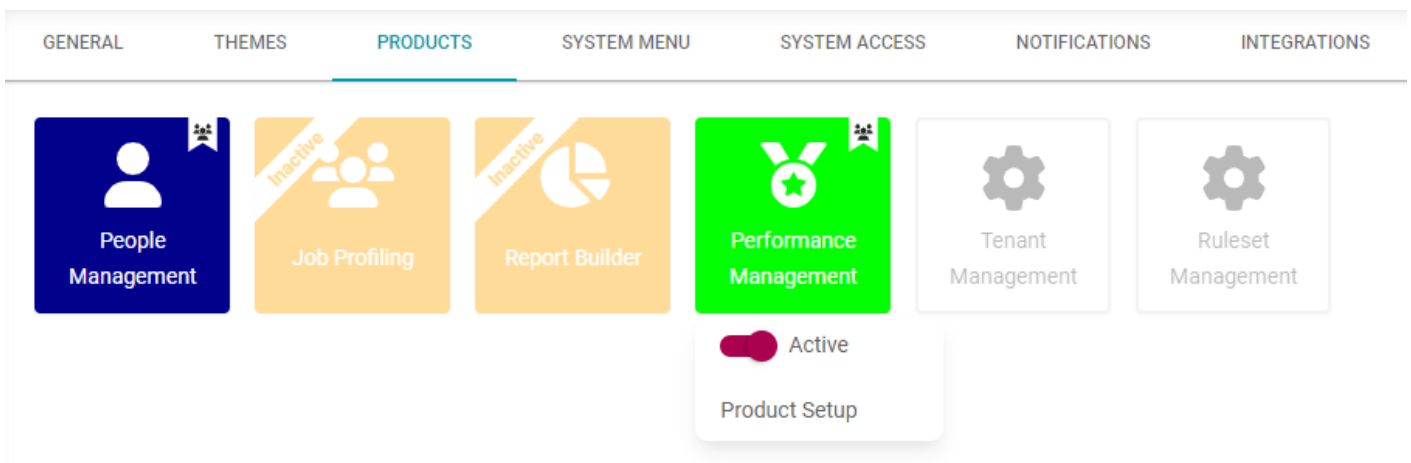Setting up the Performance Management product consists of the following steps.

1. Doing the product's setup:
   - The Review Setup - **HOW** a performance contract will function in terms of periods, sections, etc.
   - The Review Years Setup - How a review will function in a **SPECIFIC** performance year.

Activate the Product

- Open **Product Setup** from the System Settings menu.

- Click Performance Management's **Product Setup** option.

Create a Review Setup

In this section, we describe <u>how</u> a typical performance contract will function.

- Click **+REVIEW SETUP.**
- Populate the Details screen.

See below for the field definitions.

Setting	Options	Purpose

Name		The review setup's name is be used for all subsequent settings. Choose a descriptive name e.g., Salaried Employees in Grades 10 and Up.
Dual Approval	OFF	The manager can create and approve the contract, and do the rating of objectives without the participation of the employee.
	ON	The manager can create an employee's contract, but submission and rating of the objectives require the participation of the employee.
Allow a manager to override who will approve and rate	OFF	**and Dual Approval = ON** Managers and employees must participate in performance contracting.
	ON	**and Dual Approval = ON** When a manager creates a new performance contract for an employee, the manager will have the opportunity to cancel the employee's participation, i.e., the manager can create, approve, and rate objectives without the participation of the employee.
Allow managers and employees to edit review survey scores	OFF	Managers and employees can type in the employee's survey score, if a review survey is part of the review setup.
	ON	Only the manager can type in the employee's survey score, if a review survey is part of the review setup.
Description		Further clarification of the name of the review setup.
Allow Perspectives	OFF	The KPA and Stretch Targets sections will allow the direct adding of KPAs and KPIs, without the need for a perspective grouping level.
	ON	The KPA and Stretch Targets sections will require a perspective level to be added before allowing KPAs and KPIs to be loaded.
The next review period can only start when the previous one has been completed	OFF	An employee can work on all review periods at once. Not recommended.

	ON	An implicit control mechanism with which to ensure that one review period is completed (submitted, rated, and approved) before the next can be opened. This control is in addition to the Review Years - Review Periods in which individual dates for each review period phase (e.g., Setting of Objectives, Rating, etc.) are stipulated.
Self-ratings and manager's personal ratings should be submitted before the final rating can be completed	OFF	The manager only needs to load the review period's final objective ratings before approving the review period.
	ON	The employee must complete their objective self-rating and the manager must complete their own rating of the employee's objectives before the manager can load and approve the final objective ratings.

- Navigate to **Review Items.**
- Click **+REVIEW PERIOD** to load review items as needed

Each review period added implies a period for which objectives can be loaded across the sections Key Performance Areas (mandatory), Stretch Targets (optional), Values & Behaviours (optional), Leadership Behaviours (optional) and Key Competency (optional).

Each review survey added implies a separate score (for whatever was measured) in addition to the performance agreement's review periods.

Ensure you create all the review periods and review survey (if applicable) BEFORE linking to the Review Years. All periods added after linking will not show on the performance dashboards and may cause those contracts to be re-created.

- Navigate to **Sections.**
- Configure the sections using the guidelines below.
- Click **SAVE** when done.

Most sections require one or more of the following decisions:

Active or not

Relative weight percentage

Weight (%)

70.0

Can an employee/manager change the section weight while contracting?

Allow Section Weight Change

Description of the rating scale to be used when scoring the objectives in this section

Performance Rating Scales

DESCRIPTION

1 - Does not meet expectations

2 - Partially meets expectations

3 - Fully meets expectations

4 - Above expectations

5 - Exceeds expectations

Rating scale for the section if check-ins are allowed on its objectives.

Check-in Rating Scales

DESCRIPTION

Not On Track

On Track

- Navigate to **Templates.**
- Click **+NEW TEMPLATE** to load performance agreement templates from which employees and managers can choose when creating their contracts.

Search here...

DETAILS

REVIEW ITEMS

SECTIONS

TEMPLATES

NAME	PUBLISHED	USE TEMPLATE WEIGHTS	KEY PERFORMANCE AREAS	STRETCH TARGETS	VALUES & BEHAVIOURS	LEADERSHIP BEHAVIOURS	KEY COMPETENCIES
Financial Clerk	✓	✓	70%	10%	5%	5%	10%
Manager: Talent	✓	✓	70%	10%	5%	5%	10%

+ NEW TEMPLATE   COPY TEMPLATE

For each template created, ensure the following is in place:

Template created with a descriptive name e.g., Engineering - Financial Clerk - Salaried - Gr10. The more templates you create and the smaller their differences the more descriptive their names should be.

The template is published (made visible to employees) when ready.

Stipulate if the company's default section weights are used, or if the weights assigned to sections in the template get precedence.

Use Template Weights

Sections contain appropriately described objectives.

REVIEW YEARS

In this section, we will see how a general performance review (created above) will function in a specific performance year.

- Click the **Review Years** tab.
- Click **+REVIEW YEAR** to add a new performance/review year.

- Provide the basic details for the new performance year under the Details tab.

See below for the field descriptions.

Setting	Options	Purpose
Name		A descriptive name for the performance year or performance cycle. Examples are: • 2022 • 2022 - Academic Staff • 2022 - Support Staff
Max Performance Rating		Although an extended rating scale can be created for each section, this setting determines the maximum value a rating scale will have in this performance year.
Start Date **End Date**		The range of the performance year.
Locked	ON	This performance year is temporarily (e.g., to do system maintenance) or permanently (e.g., once the performance year has been closed out) locked. Users are not able to create new contracts or work on existing contracts.
	OFF	This performance year is available for existing and new contracts.
Active	ON	This performance year is available when employees created new contracts.
	OFF	This performance year is not active. Users are not able to create new contracts or work on existing contracts.

- Navigate to **Review Setups**.
- Click **+REVIEW SETUP** to link a Review Setup (from the ones created earlier) to this Performance Year.

NAME	DESCRIPTION	DUAL APPROVAL	ALLOW PERSPECTIVES	REVIEW PERIODS	SECTIONS	VALUES & BEHAVIOURS	LEADERSHIP BEHAVIOURS	TEMPLATES
Salaried Employees	This review setup is applicable to All Employees	✓	✓	3	6	5	5	2

DETAILS

REVIEW SETUPS

🔗 LINK REVIEW SETUP   CANCEL

Define the Review Periods and Phases for the Performance Year

- With the review setup (e.g., containing the agreement sections) now linked to a performance year, give the details of each review period's phases in the context of the current performance year.

REVIEW PERIODS

TARGET AUDIENCE

Review Period 1   20.00%

StartDate
01/Jan/2022

EndDate
31/Dec/2022

PHASE	START DATE	END DATE	ACTIVE
Setting of Objectives	2022-01-01	2022-03-31	
Check-Ins	2022-02-01	2022-05-31	⬤
Ratings	2022-06-01	2022-06-30	

Review Period 2   70.00%

StartDate
01/Jul/2022

EndDate
31/Dec/2022

PHASE	START DATE	END DATE	ACTIVE
Setting of Objectives	2022-07-01	2022-07-31	
Check-Ins	2022-07-01	2022-11-30	⬤
Ratings	2022-12-01	2022-12-31	

Value Survey   10.00%

💾 SAVE   ⚖ UPDATE PERIOD WEIGHTS   CANCEL

For each review period and its phases, pay attention to the following:

> The review period's date range e.g., if it is an annual, bi-annual, or quarterly contract.

> The dates of each phase in a review period. These dates will determine when a phase becomes available to employees.

> For each review period, if its Check-in phase is active or not.

> Don't forget about the Value Survey dates.

> Click **UPDATE PERIOD WEIGHTS** at the bottom of the screen to stipulate the relative importance of the review periods and value survey.
>
> ⚖️ UPDATE PERIOD WEIGHTS

Update period weights

Review Period 1

20.0

Review Period 2

70.0

Value Survey

10.0

CANCEL   UPDATE

- Click **(LINK) PEOPLE GROUP** to link a target audience to this performance year from the predefined People Groups.
- View who is part of the Target Audience (i.e., the selected People Group) by clicking **(VIEW) TARGET AUDIENCE.**

MASTER DATA

Master data comprises all company-specific information contained in dropdowns, lookups, and customer-specific messages.

- Open the system's Master Data.

Ruleset Setup

Master Data

Translation

People Groups

Product Setup

- Locate and click **SectionItems** under the Performance Management Primary Product column.

TITLE	DESCRIPTION	PRIMARY PRODUCT
Appointment Types		Job Profiler
Termination Reasons		Job Profiler
OrgUnitTypes		Job Profiler
Marital Statuses		People Management
Races		People Management
Genders		People Management
initials		People Management
Home Languages		People Management
Disabilities		People Management
Citizenships		People Management
Titles		People Management
UserFileCategories		People Management
SectionItems		Performance Management

- Add all required library items e.g.:
  - Perspectives (Type 1)
  - Key Performance Areas (Type 2)
  - Key Performance Indicators (Type 3)
  - Leadership Behaviours (Type 4)
  - Values & Behaviours (Type 5)
  - Key Competencies (Type 6)

ORDER	NAME	DESCRIPTION	TYPE	LAST EDITED
53	Career paths populated online in line with HR input.	Career paths populated online in line with HR input.	3	sz003 02/28/2022 15:44:22
54	Compliance to audit requirements in HR.	Compliance to audit requirements in HR.	3	sz003 02/28/2022 15:44:30
55	Data validation for systems.	Data validation for systems.	3	sz003 02/28/2022 15:44:45
56	Policies	Policies	2	sz003 02/28/2022 15:47:37
57	Compliance to business and environment changes	Compliance to business and environment changes	3	sz003 02/28/2022 15:47:52
58	Deciding and Initiating Action	Takes responsibility for actions, projects and people; takes initiative and works under own direction; initiates and generates activity and introduces changes into work processes; makes quick, clear decisions which may include tough choices or considered risks.	6	sz003 02/28/2022 15:53:46
59	Leading and Supervising	Provides others with a clear direction; motivates and empowers others; recruits staff of a high calibre; provides staff with development opportunities and coaching; sets appropriate standards of behaviour.	6	sz003 02/28/2022 15:54:07
60	Working with People	Shows respect for the views and contributions of other team members; shows empathy; listens, supports and cares for others; consults others and shares information and expertise with them; builds team spirit and reconciles conflict; adapts to team and fits in well.	6	sz003 02/28/2022 15:54:23

EMAIL NOTIFICATIONS

Performance Management email notifications can be activated and customised.

- From the System Settings menu, select **Ruleset | Notifications**.

Below is the list of email templates available:

Nr	Name	Description	Default Active (Yes/No)
1	Objective Settings Approved By Person	A person submitted the objective settings of an agreement.	

2	Objective Settings Approved By Manager	A person submitted the objective settings of an agreement.	
3	Objective Settings Modified By Person	A person modified the objective settings of an agreement.	
4	Objective Settings Modified By Manager	A manager modified the objective settings of an agreement	
5	Objective Settings Deadline For Person	Notification sent as reminder of the objective settings deadline.	
6	Objective Settings Deadline For Manager	Notification sent as reminder of the objective settings deadline.	
7	Check-In Phase Started	When the start date of the check-ins has been reached.	
8	Check-In Deadline For Person	Notification sent as reminder of the Check-In deadline.	
9	Check-In Deadline For Manager	Notification sent as reminder of the Check-In deadline.	
10	Self-Ratings Approved	When a person submitted the self-ratings of an agreement	
11	Manager Rating Submitted	When the manager has submitted the final rating of an agreement.	
12	Self-Ratings Modified By Person	When a person modifies the self-ratings of an agreement.	
13	Manager Ratings Modified	When a manager modifies the manager rating of an agreement.	
14	Ratings Deadline For Person	Notification sent as reminder of the Ratings deadline.	
15	Ratings Deadline For Manager	Notification sent as reminder of the Ratings deadline	
16	Manager Final Rating Submitted	When the manager has submitted the final rating of an agreement.	

| 17 | Manager Final Rating Modified | When the manager has submitted the final rating of an agreement. | |

TRANSLATION

Translate system terminology and messages. This functionality depends on the Translation module, accessed from the System Settings.
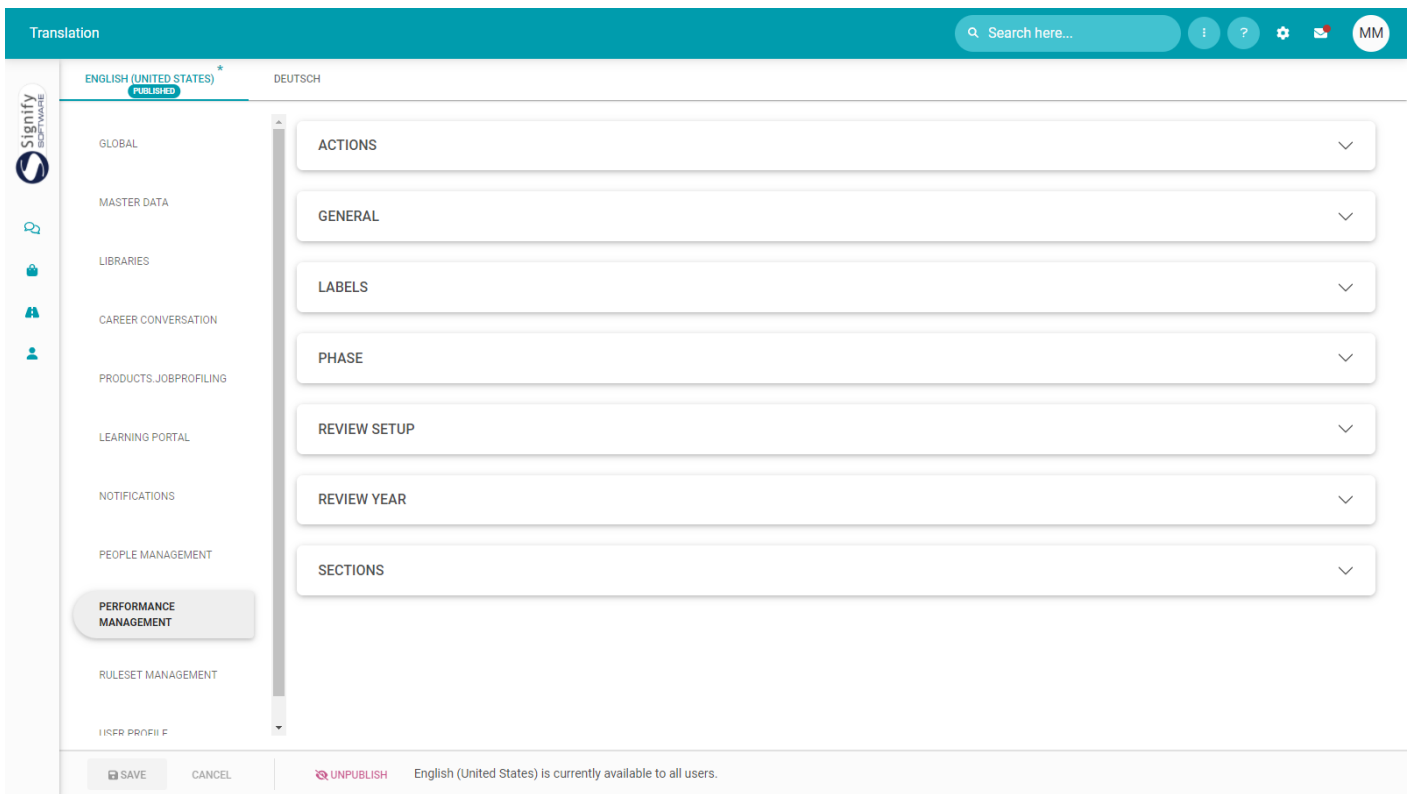
Ruleset Setup

Master Data

Translation

People Groups

Product Setup

- Locate and click **Performance Management**.

There is no set way of customising the system terminology except by searching for a word or phrase in the general search area. See example below.