

Chapter 3: Product setup and administration

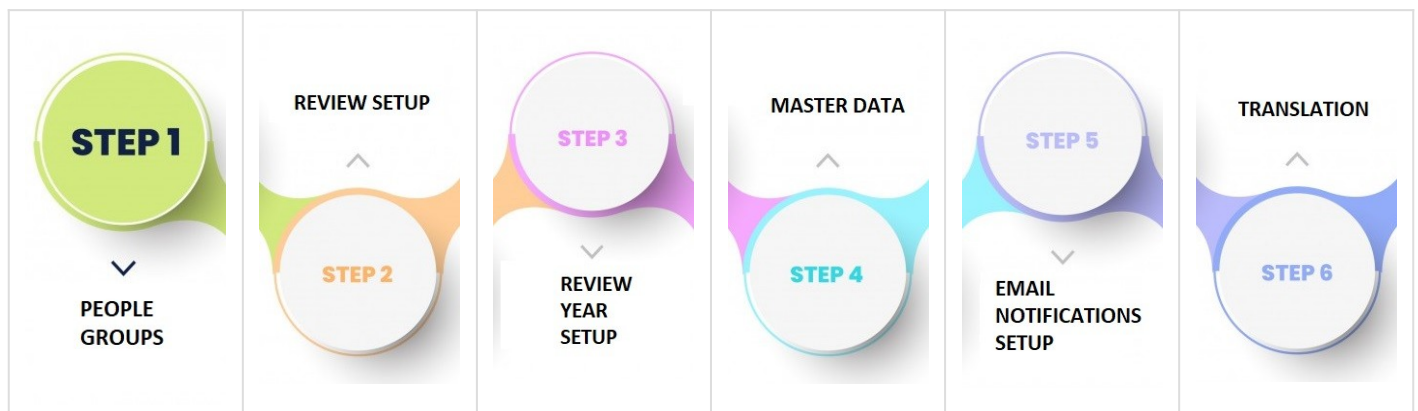
- [Performance Management Product Setup and Configuration](#)

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

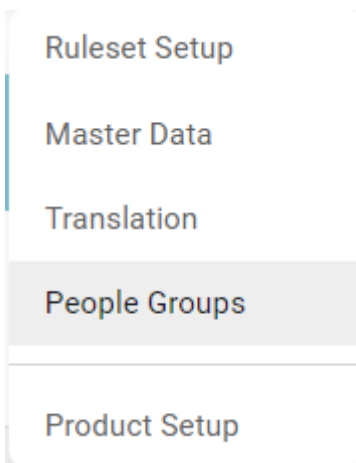


PEOPLE GROUPS

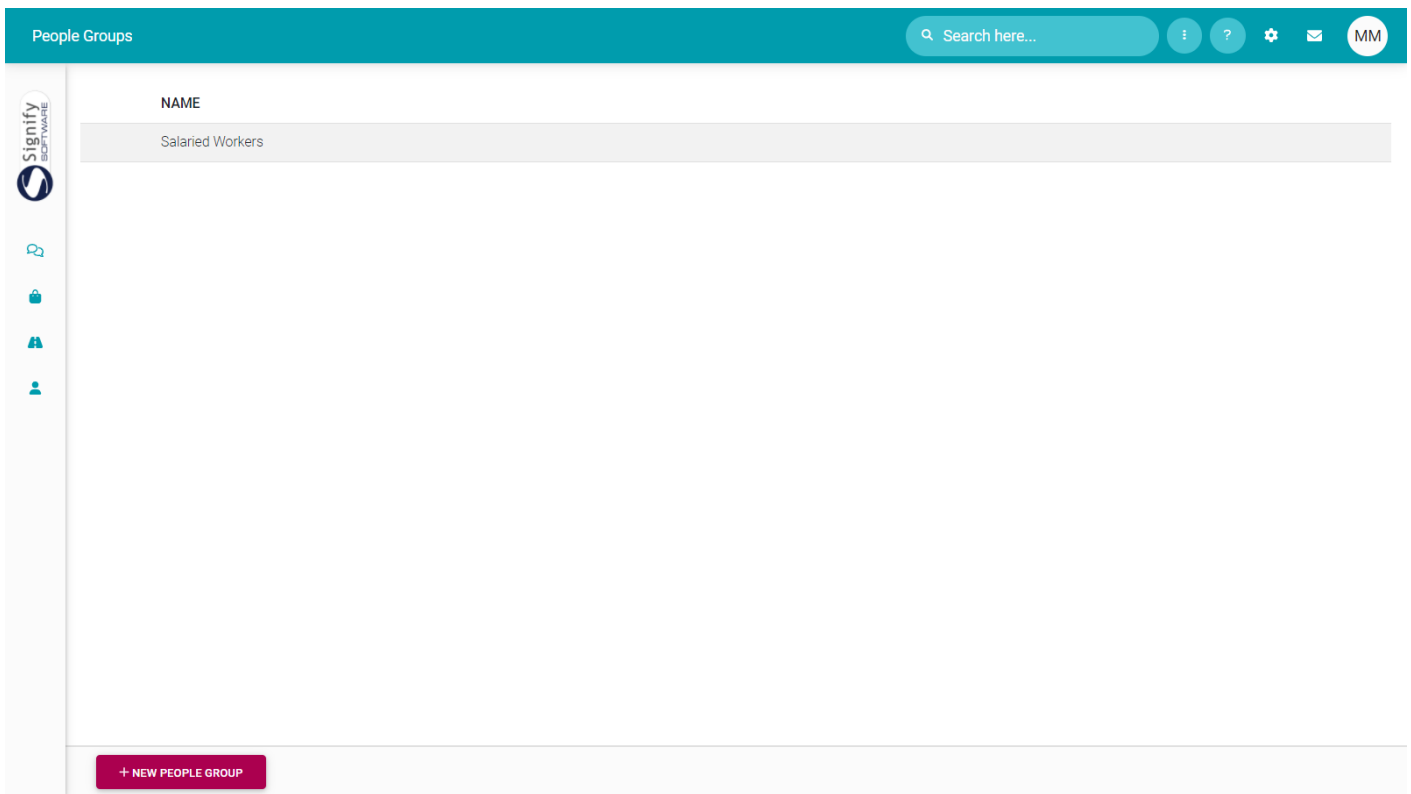


The management of performance does not always apply to all employees in a company. Use the following steps to define your target audience. In the following section you will be required to link the target audience to a performance year.

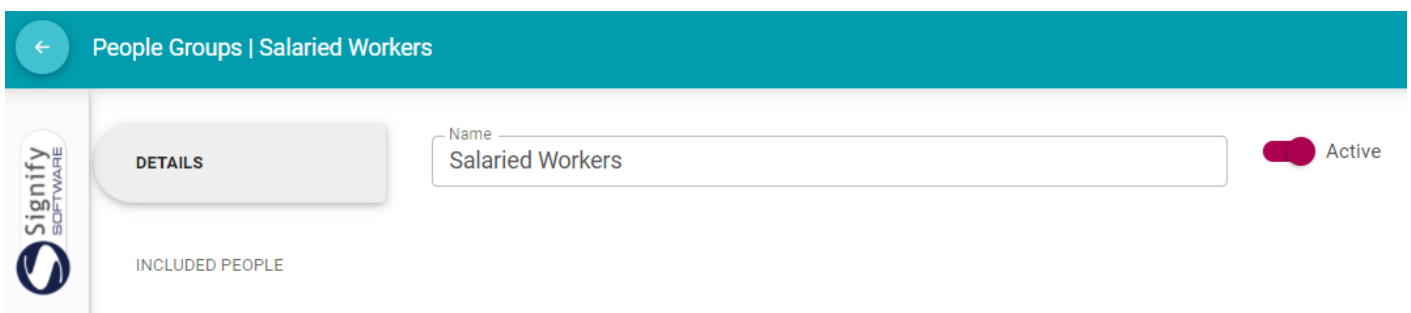
- From the System Settings menu, select **People Groups**.



- 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.

←

People Groups | Salaried Workers

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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

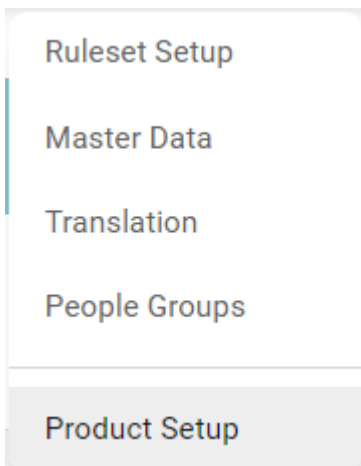
REVIEW SETUP

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

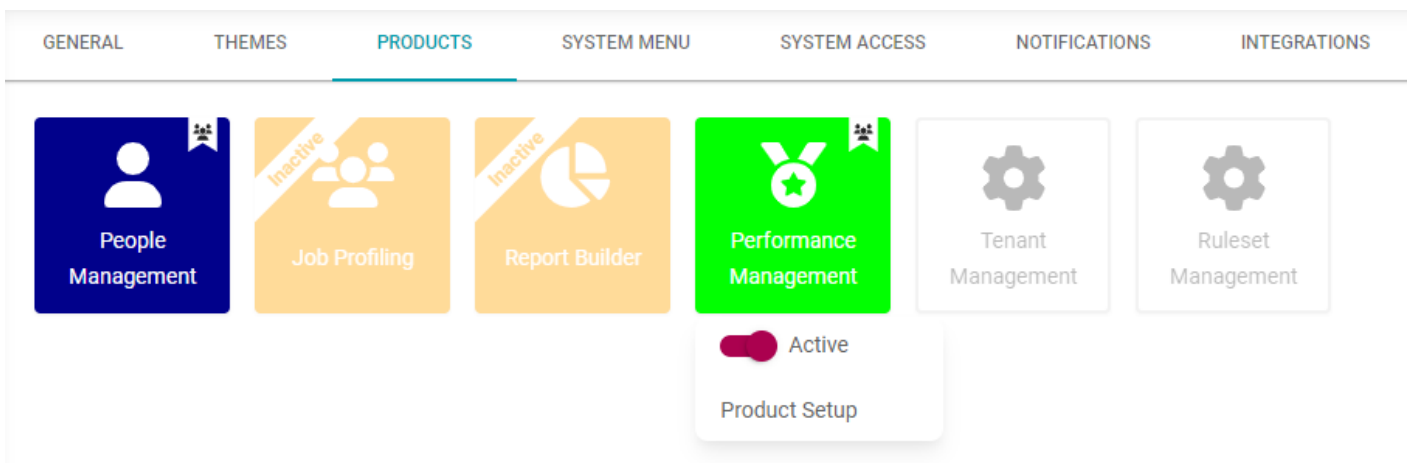
- Doing the product's setup:
 - The Review Setup - **HOW** a performance contract will function in terms of periods, sections, etc.
 - The Review Years Setup - How a review will function in a **SPECIFIC** performance year.

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 how a typical performance contract will function.

Performance Management

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REVIEW SETUPS

REVIEW YEARS

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

+ REVIEW SETUP

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

← Performance Management | Salaried Employees

Search here...

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DETAILS

REVIEW ITEMS

SECTIONS

TEMPLATES

Name

Salaried Employees

Description

This review setup is applicable to All Employees

Dual Approval

Allow manager to override who will approve and rate

Allow managers and employees to edit review survey scores

Allow Perspectives

The next review period can only start when the previous one has been completed

Self-ratings and manager's personal ratings should be submitted before the final rating can be completed

SAVE

CANCEL

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	<p>An implicit control mechanism with which to ensure that one review period is completed (submitted, rated, and approved) before the next can be opened.</p> <p>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.</p>
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

Performance Management | Salaried Employees

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DETAILS

+ REVIEW PERIOD

+ REVIEW SURVEY

REVIEW ITEMS

SECTIONS

TEMPLATES

NAME	WEIGHT	ACTIVE
Review Period 1	20.00%	<input checked="" type="checkbox"/>
Review Period 2	70.00%	<input checked="" type="checkbox"/>
Value Survey	10.00%	<input checked="" type="checkbox"/>

SAVE

CANCEL

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.

Performance Management | Salaried Employees

Search here...

DETAILS

REVIEW ITEMS

SECTIONS

TEMPLATES

KEY PERFORMANCE AREAS

Weight (%) 70.0 Active

Allow Section Weight Change

Performance Rating Scales

DESCRIPTION	RATING	ACTIVE
1 - Does not meet expectations	1.00	<input checked="" type="checkbox"/>
2 - Partially meets expectations	2.00	<input checked="" type="checkbox"/>
3 - Fully meets expectations	3.00	<input checked="" type="checkbox"/>
4 - Above expectations	4.00	<input checked="" type="checkbox"/>
5 - Exceeds expectations	5.00	<input checked="" type="checkbox"/>

Click to add another item

Check-in Rating Scales

DESCRIPTION	ACTIVE
Not On Track	<input checked="" type="checkbox"/>
On Track	<input checked="" type="checkbox"/>

Click to add another item

STRETCH TARGETS

VALUES & BEHAVIOURS

LEADERSHIP BEHAVIOURS

KEY COMPETENCIES

ACTION PLAN

SAVE CANCEL

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.

←

Performance Management | Salaried Employees

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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.



Sections contain appropriately described objectives.

Template Details

Name
Manager: Talent



Published



Use Template Weights

Template Content

KEY PERFORMANCE AREAS

70.00% ^

+ PERSPECTIVE

1. Teams / Leadership

100.00%

+ KEY PERFORMANCE AREA

1.1 Succession Management 🗑

50.00%

KEY PERFORMANCE INDICATOR

MEASURES

RATINGS

WEIGHT

Implement online tool, Dashboard and report configuration.

System aligned to configuration document as per company requirements and outputs.

August 2022

100.00%

[Click to add another key performance indicator](#)

1.2 Project participation 🗑

50.00%

KEY PERFORMANCE INDICATOR

MEASURES

RATINGS

WEIGHT

Drive collaborative culture through various projects

Full delivery to execution phase.

100.00%

[Click to add another key performance indicator](#)

💾 SAVE

⚙ UPDATE SECTION WEIGHTS

CANCEL

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.

Performance Management

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REVIEW SETUPS

REVIEW YEARS

NAME	START DATE	END DATE	REVIEW SETUPS	LOCKED FOR EDITING	ACTIVE
2021	1/1/2021	12/31/2021	1	×	×
2022	1/1/2022	12/31/2022	1	×	✓

+ REVIEW YEAR

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

← Performance Management | 2022

Search here...

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DETAILS

REVIEW SETUPS

Name

2022

Performance Max Rating

5

Start Date

01/Jan/2022

End Date

31/Dec/2022

Locked

Active

SAVE

CANCEL

See below for the field descriptions.

Setting	Options	Purpose
Name		<p>A descriptive name for the performance year or performance cycle.</p> <p>Examples are:</p> <ul style="list-style-type: none"> • 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	<p>This performance year is temporarily (e.g., to do system maintenance) or permanently (e.g., once the performance year has been closed out) locked.</p> <p>Users are not able to create new contracts or work on existing contracts.</p>
	OFF	This performance year is available for existing and new contracts.
Active	ON	This performance year is available when employees created new contracts.
	OFF	<p>This performance year is not active.</p> <p>Users are not able to create new contracts or work on existing contracts.</p>

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

Performance Management | 2022

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DETAILS

REVIEW SETUPS

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

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.

Performance Management | 2022 | Salaried Employees

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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**.

Performance Management | 2022 | Salaried Employees

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REVIEW PERIODS

TARGET AUDIENCE

NAME

Salaried Workers

⌕ PEOPLE GROUP

⌕ TARGET AUDIENCE

CANCEL



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.

Master Data			Search here...						MM
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)

Master Data SectionItems					
Search here...					
+ ITEM					
SETUP					
ORDER	NAME	SET ORDER BY 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.	
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TRANSLATION



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

Ruleset Setup

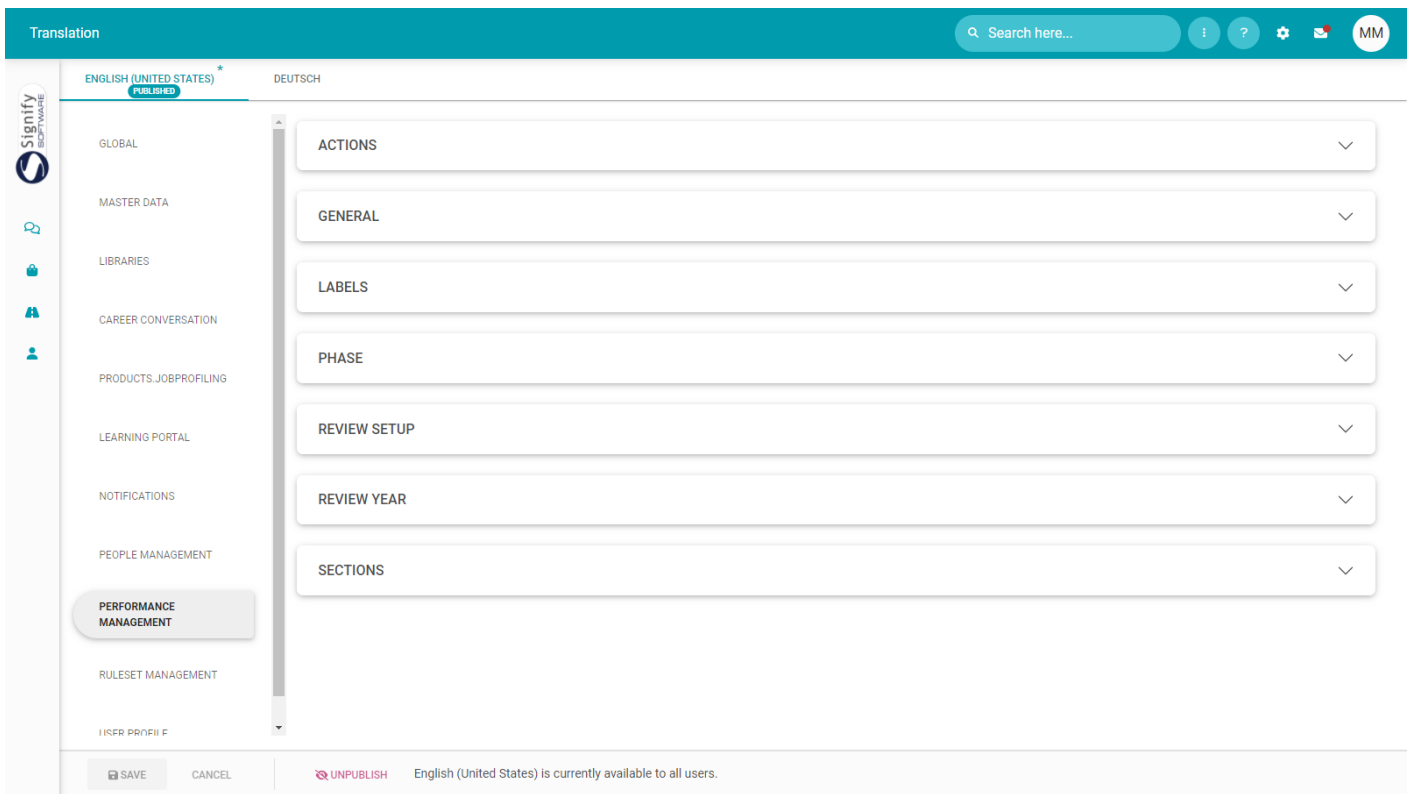
Master Data

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.

