The Performance Management Dashboard - Create a new contract

Process: Step 1

Lesson duration

About 20 minutes

What you will **learn:**

- Creating a new performance contract by **copying a previous contract**.

- Creating a new performance contract by **using a contract template**.

- Creating a new Performance Contract by copying a contract **from another employee**. (Manager's function only).

- Creating a new performance contract by **starting on a blank page**.

Create a New Performance Contract

In the previous section, we assumed an existing Performance Contract and looked at ways of engaging with it e.g., by clicking **CONTINUE** to continue listing the performance objectives. On this page, the assumption is that you don't have an existing contract for the current performance year and would like to create one.

If an employee doesn't have an existing contract for the current performance cycle:

If you haven't yet created a contract for the current performance cycle, the dashboard will feature a **START** button at #7 above.
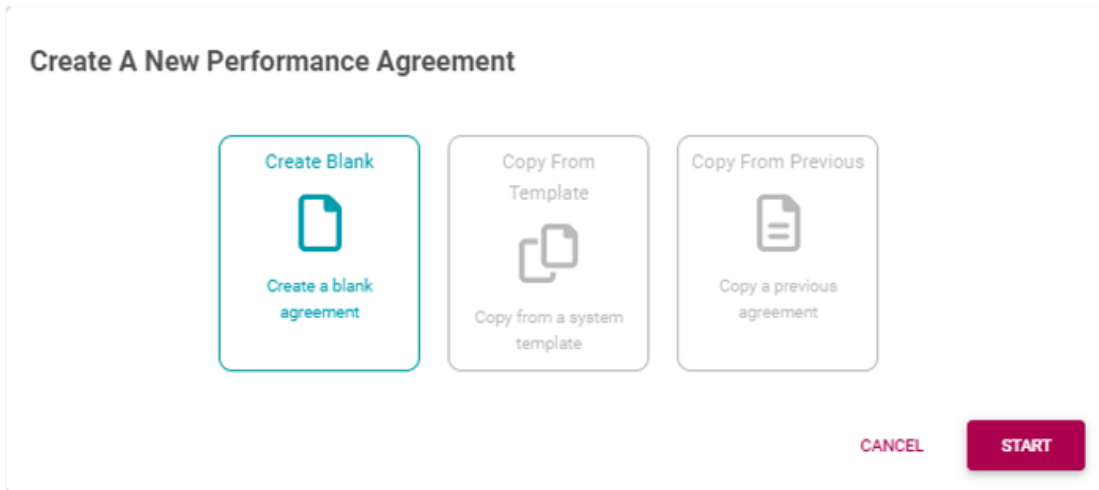
My Progress

| REVIEW PERIOD 1 | **You**: Load, amend and/or confirm the review period's objectives. | 31 Mar 2022 | (2 Weeks Remaining) | ⧗ START |

- Click the **START** button to initiate a wizard which will take you through the steps needed to create a Performance Contract.

An employee has the above three options available; a manager also has access to the fourth option below.

1. **Create Blank** - which means the user will have to type, or select every objective required.
2. **Copy From Template** - which means start your contract from a template example and then customise it as needed.
3. **Copy From Previous** - which means reusing, or starting with last year's performance contract.
4. **Copy an agreement of one of my employees** - only available to a manager, should he/she want to copy contracts between employees.

Decide which option suits you best and then follow the guidelines for each below. We discuss them in order of convenience.

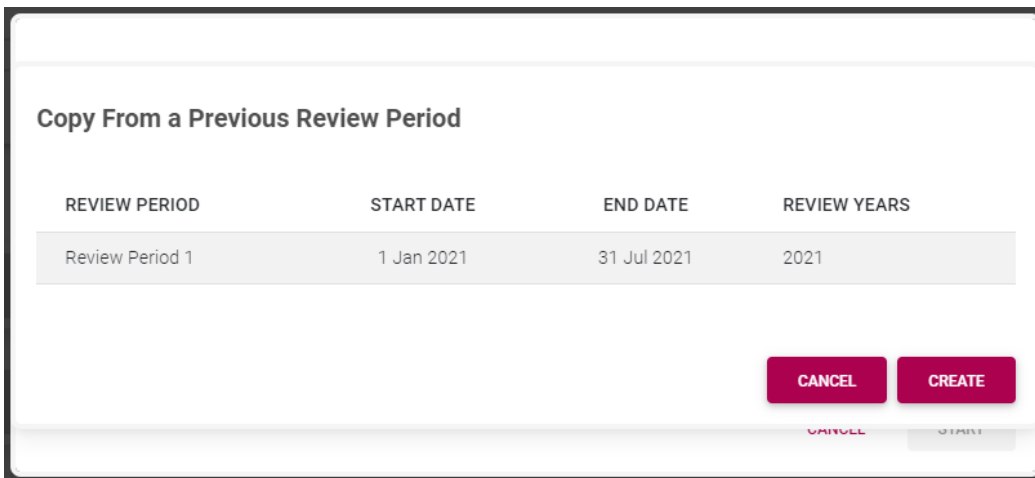# Can I copy one of my historical contracts to start from?

If you have a previous contract which is still relevant, given your current role, choose the tile **Copy From Previous**, and then select the contract to copy from. All the agreement's contents will be copied to your new performance cycle's contract, except for the approval statuses, ratings, and comments. Then, continue editing and/or adding objectives as needed.

- Select the tile **Copy From Previous**.
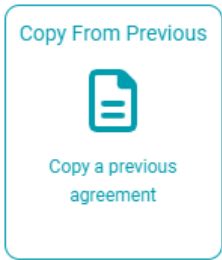
A list of all previous agreement review periods is presented. Note you can, for instance, select a Performance Agreement's first or second (or third or fourth - if applicable) review periods.

- Click the chosen review period and click **CREATE** to create your contract.

Notice that by copying from a previous period you have...

... created the contract

... created the agreement's review period(s)

... populated all the agreement sections with the same content as in the original agreement.

Adding and amending objectives is discussed in another section.

Is there a contract template in the library that closely fits my role?

Use your job title or any other keywords to try and locate a contract template that may fit your job profile. Before choosing the template, ensure to preview its contents to ascertain its relevance to your current job. Then, continue editing and/or adding objectives as needed.

Agreement templates are predefined and prepopulated agreements, set up by the System Administrator, which can be used as a convenient way to create a new agreement.

- Click the tile **Copy From Template**.
- Search for the required template from the library.
- Use the **PREVIEW** button if you are unsure about the contents of a template.


- Click on the chosen template name.
- Click **CREATE** to create the new agreement and to open it in the first review period.

The field **USE TEMPLATE WEIGHTS** has the following impact on new agreements.

TICK ON: You will start with the template's section weights when creating a new agreement.

TICK OFF: You will start with the default company performance management section weights when creating a new agreement, i.e., override the template section weights.

Notice that by copying from an agreement template you have...
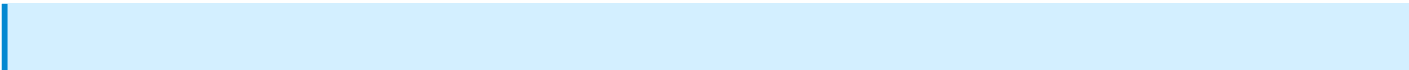
> ... created the contract

> ... created the agreement's review period(s)

> ... populated all the agreement sections with the same content as in the template agreement.


Does another employee's agreement closely fit my current role?

This option is only available to managers. Managers have access to copy contracts between employees and then edit them as needed. If you are aware that a colleague's role (i.e., Performance Agreement) is similar to yours, ask your manager to copy it to you and then change it as needed. Your manager will perform the following steps on your behalf.
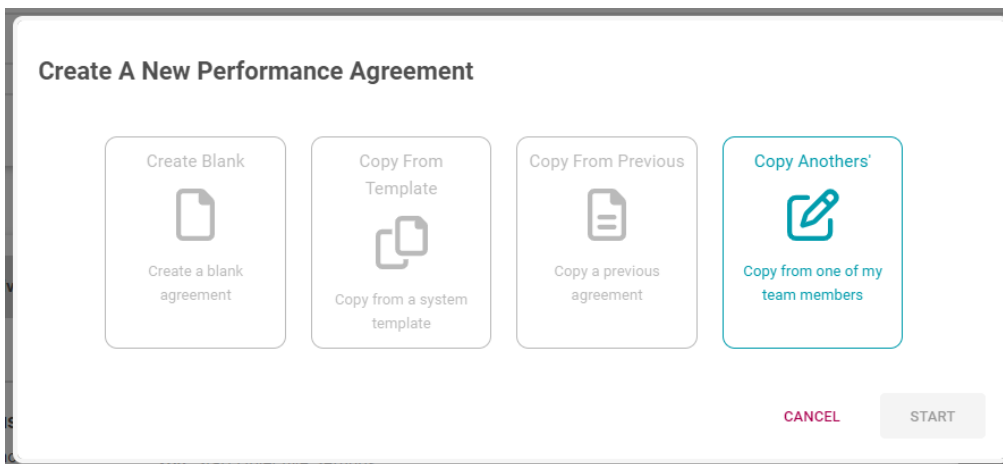
- Click the tile **Copy Another's**.
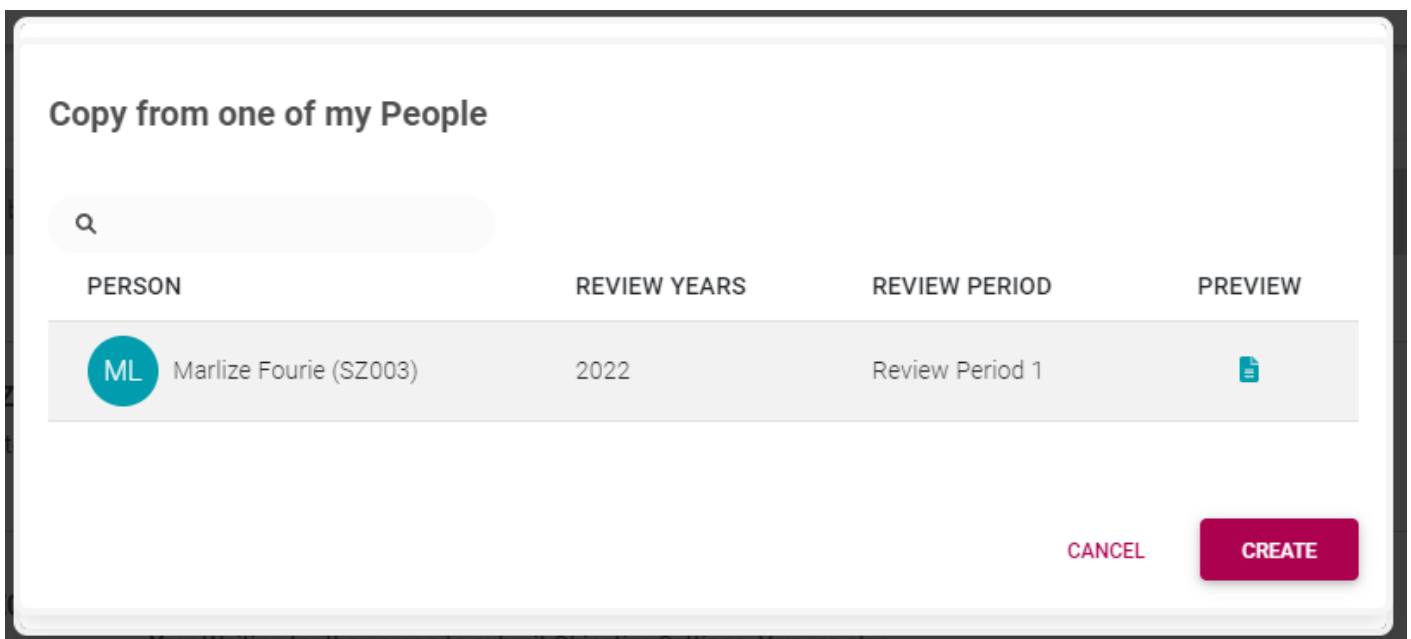
- Search for the applicable employee, and review period.
- Click the record's **PREVIEW** icon to make sure this is the correct agreement.
- Click on the chosen item and then click **CREATE**.

The new agreement is created and is opened in the first review period.

Notice that by copying from another employee's agreement, your manager has...

> ... created the contract

> ... created the agreement's review period(s)

> ... populated all the agreement sections with the same objectives as in the source agreement.

Is there no other option but to start with a blank agreement?

If you don't have any previous contracts, there are no matching templates in the library, and your work is unlike any of your colleagues', then choose this tile to create a blank agreement for you. You will have the opportunity to create a new Performance Agreement from scratch in cooperation with your manager.

To create a new blank agreement for the selected performance year:

- Choose the **Create Blank** tile,
- then click **START** to create your contract.
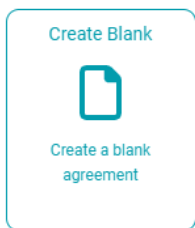
Your Performance Agreement screen will display, showing the different sections, but without any objectives. Adding objectives is discussed in another section.

What can I expect to see once I have created a contract for a new performance cycle?

Whatever you choose from the above options, the system might ask a question or two to identify the most appropriate template or historical contract. But, once that has been settled, the contract is either copied or created and the following will happen.

> The new contract is created (including its one, two, three or perhaps four assessment periods).

> The screen opens in the first review period.

> If a template or historical contract was selected as a source, its contents will reflect in the first assessment period.

> When you exit the assessment period (using the BACK TO DASHBOARD button), you will return to the Performance Dashboard and see the contract stages and phases reflected there.

See below for a typical Performance Agreement. Depending on your choices above there may be some objectives loaded.

The details of the screen are discussed on another page.

Recommended further reading:

- [Glossary](#) of terminology and definitions
- [How to Use Performance Management with Success](#)
- [The Employee's Performance Management Dashboard](#)
- [Open an Existing Contract](#)
- [Create a New Contract](#)
- [Functionalities and Layout of the Performance Management Dashboard](#)
- [The Manager's Performance Management Dashboard](#)
- [Overview of The Performance Agreement Screen](#)
- [Set your objectives - Part 1 (Working with KPAs and KPIs)](#)
- [Set your objectives - Part 2 (Working with the other sections)](#)
- [Perform a Check-in](#)
- [Rate your objectives](#)

Revision #45
Created 18 February 2022 08:15:34 by Eduard
Updated 22 January 2025 09:51:43 by Chanan Booysen