

# Chapter 5: FAQs and How-To Guides

Even with comprehensive guidance, users may encounter challenges or have questions about specific features of the module. This chapter addresses the most frequently asked questions, offering practical solutions to common issues, troubleshooting advice, and tips for getting started. By compiling these insights, we aim to provide quick, accessible answers that empower users to resolve concerns efficiently and continue leveraging the module effectively.

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# FAQs for Employees and Managers

## **Why am I, as the employee, unable to submit and approve my ratings?**

Why am I, as the employee, unable to submit and approve my ratings?

## **Why am I as the manager unable to submit and approve my final ratings?**

Why am I as the manager unable to submit and approve my final ratings?

In order to submit final ratings, the employee and manager are required to both submit their ratings. Then the manager can proceed to submit their final ratings.

Additionally, the manager needs to ensure all the objectives have been rated.

## **Why am I unable to submit my objectives?**

Why am I unable to submit my objectives?

To submit objectives, ensure the KPIs for each KPA add up to 100%. Also, ensure there are no duplicate KPAs in a section.

## **Why is the self-rating button not available to employees, but only to managers?**

Why is the self-rating button not available to employees, but only to managers?

The **Dual Participation** setting has been turned off, therefore users are only able to view their performance contracts, while managers will be able to rate.

### Why am I unable to select a perspective from the menu?

#### Why am I unable to select a perspective from the menu?

If a perspective is not currently available, please verify that it hasn't been disabled in the **Master Data Library**. If you find that a perspective is missing from the **Master Data Library**, kindly reach out to your administrator to have it added.

### Why am I unable to set objectives for the new review period?

#### Why am I unable to set objectives for the new review period?

If the "The next review period can only start when the previous one has been completed" setting has been switched on in the review setup, it means that the previous review period's **Objective-Setting Phase, Check-In Phase, and Ratings Phase** must be completed before you can start with the new review period.

If the setting is switched off, an employee can work on all review periods at once.

### Why is the manager unable to approve the employee's ratings?

#### Why is the manager unable to approve the employee's ratings?

There could be several reasons why the manager is unable to approve the employee's ratings:

- The **phase end date** has passed and therefore the manager cannot finalise and approve ratings. Either the review setup's setting that ignores phase end dates should be switched on, or the phase end date needs to be amended.
- The employee has not completed the **final ratings** for each of their KPIs. Once the employee has completed the final ratings, the manager should be able to continue.

### Why am I unable to view the performance agreements of my direct reportees?

#### Why am I unable to view the performance agreements of my direct reportees?

This issue may occur if direct reportees are not assigned to the correct performance manager. After the administrator updates the **reporting lines**, the manager will be able to view the

performance agreements of their reportees.

### **Why am I not given the option to set my objectives?**

Why am I not given the option to set my objectives?

A possible reason for this could be that the **phase end date** for objective setting has passed.

### **Why am I unable to modify my ratings as an employee after I have submitted them?**

Why am I unable to modify my ratings as an employee after I have submitted them?

If the manager has completed their final rating, the manager needs to unapprove their final ratings. This unlocks the ratings phase for the employee. However, if the final ratings have not been completed, the employee can independently proceed with the following step. The employee should unapprove their ratings and can then add their comments alongside the ratings.

### **Why am I unable to modify my objectives as an employee after I have submitted them?**

Why am I unable to modify my objectives as an employee after I have submitted them?

The manager needs to unapprove the performance agreement, then the employee can modify the objectives. Thereafter, both the manager and the employee need to approve the modified objectives for the performance cycle to proceed.

### **I have completed my objective settings phase and ratings as an employee, but now it shows "Incomplete" on the system. What happened?**

I have completed my objective settings phase and ratings as an employee, but now it shows "Incomplete" on the system. What happened?

The manager has selected "Modify Objectives" while the **Objective-Setting Phase** is open, which has unapproved the contract. Therefore, the manager and the employee will have to approve the objectives again and submit their ratings.

## Why is an employee not showing on the "My Team" tab?

### Why is an employee not showing on the "My Team" tab?

Please ensure the employee has been added to the People Group linked to the Review Setup. Ask the administrator to:

- Open the Setup and Configuration menu by clicking on the gear icon at the top of the screen (if available)
- Select the "Product Setup" option
- Go to the "Review Years" tab and select the Review Year to which the phase belongs
- Go to the "Review Setups" tab and click the relevant Review Setup you would like to adjust
- Go to the "Target Audience" tab and ensure the employee has been added to the relevant group

## What do I do if the employee is linked to the incorrect performance agreement?

### What do I do if the employee is linked to the incorrect performance agreement?

If the employee and manager have submitted their ratings, both need to unapprove their ratings. Next, both the manager and the employee need to unapprove their objectives they have set. Finally, the current performance agreement can be deleted.

Alternatively, performance management administrators with the required access can perform a deletion by clicking on the Module-Specific Functions menu, selecting Bulk Actions, and then searching for the correct agreement to delete under the Delete Agreements menu item.

# FAQs for Administrators

## What is the Performance Management module?

The **Performance Management** module is used to manage employee performance agreements, goal setting, check-ins, reviews, ratings, and development planning. It allows organisations to monitor employee performance against set objectives, provide structured feedback, and maintain formal performance records.

## How do I activate the Performance Management module?

To activate the module: - Navigate to **Setup and Configuration** - Open **Ruleset Setup** - Select the relevant ruleset - Open the **Products** tab - Select the **Performance Management** product card - Toggle the product status to **Active** Once activated, the module becomes available for setup.

## Why can users not see the Performance Management menu item?

There are several possible reasons: - The product has not been activated - The system menu item has not been enabled - User permissions are restricted - The user is linked to the wrong ruleset Ensure both the product and system menu item are active.

## What is a review setup?

A **review setup** defines the structure, settings, and rules of the performance review process. It controls: - Review workflows - Rating permissions - Approval requirements - Employee participation - Performance agreement structure A review setup forms the foundation of the performance cycle.

## What is a review year?

A **review year** represents a full performance cycle for a specific year. It contains the review periods, surveys, timelines, and performance agreements used during that cycle.

### What is dual participation?

**Dual participation** allows both employees and managers to participate electronically in the performance review process. This includes: - Creating agreements - Setting objectives - Completing self-ratings - Completing manager ratings - Approving final ratings If disabled, only managers participate electronically.

### What are perspectives?

**Perspectives** are the highest level of categorisation in a performance agreement. When enabled, **Key Performance Areas (KPAs)** are grouped under perspectives. When disabled, KPAs can be added directly without perspective grouping.

### What is a review period?

A **review period** is a weighted performance evaluation phase within a review cycle. Examples include: - Quarterly reviews - Mid-year reviews - Annual reviews Each review period contributes to the overall performance score.

### What is a review survey?

A **review survey** is an evaluation tool used during performance reviews. It may include: - Survey questions - Weightings - Scores - Mandatory comments - Revised scores Survey results contribute to the overall performance outcome.

### What sections can be included in a performance agreement?

A performance agreement may include: - **Primary Goals** - **Stretch Goals** - **Values and Behaviours** - **Leadership Behaviours** - **Key Competencies** - **Action Plan** Only **Primary Goals** are mandatory by default.

### What are Primary Goals?

**Primary Goals** are the core performance expectations of an employee's role. They define the essential responsibilities and outputs required for effective job performance.

### What are Stretch Goals?

**Stretch Goals** are optional, ambitious objectives designed to push performance beyond routine expectations. They are often linked to: - Innovation - Strategic growth - Transformation - Long-term development

### What are Values and Behaviours?

This section evaluates *how* employees achieve results. It focuses on workplace behaviours such as: - Professionalism - Teamwork - Accountability - Communication - Integrity This complements goal-based performance measurement.

### What are Leadership Behaviours?

**Leadership Behaviours** measure leadership effectiveness and influence. This section may evaluate: - Strategic thinking - Decision-making - Team leadership - Coaching - Governance It is especially relevant for senior roles.

### What are Key Competencies?

**Key Competencies** measure the skills and capabilities that support strong performance. Examples include: - Problem solving - Communication - Innovation - Technical expertise - Critical thinking These measure capability, not just results.

### What is an Action Plan?

An **Action Plan** is used to address performance gaps, risks, or development needs. It links performance feedback to concrete improvement actions and development planning.

### Why am I getting a section weight error?

This error usually occurs when the combined weights of all active sections do not equal **100%**. Before saving, ensure all enabled sections total exactly 100%.

### What is interpolation?

**Interpolation** maps actual KPI values to a performance rating scale. For numerical KPIs, the system automatically converts actual values into ratings based on predefined ranges.

### Can other people besides the manager rate an employee?

Yes, if **Allow Non-Manager Ratings** is enabled. This allows selected individuals such as peers or project leads to provide KPI-level ratings. This is useful for: - Peer reviews - 360-degree feedback - Cross-functional evaluations

### Can non-manager ratings be anonymous?

Yes. The system supports several anonymity options: - Fully anonymous - Anonymous to employees only - Anonymous comments only - Hidden evaluation summaries This helps reduce bias.

### What are locked agreements?

**Locked agreements** prevent managers and employees from editing performance agreements. When enabled: - Agreements remain viewable - Editing is disabled - Finalised records remain protected This preserves data integrity.

### What does auto-copy objectives do?

**Auto-copy objectives** automatically copies objectives from the previous review period into the next one. This reduces administrative effort when objectives remain similar across review periods.

### What are Performance Management Section Items?

These are master data items used in performance agreement sections. Examples include: - Values - Behaviour items - Leadership items - Competency items They can be reused across templates and review setups.

### Why should I configure evaluation periods?

**Evaluation periods** define the official date range for performance reviews. They help manage:  
- Review start dates - Review end dates - Rating deadlines - Review schedules This ensures reviews remain aligned with business timelines.

### Why should I use templates?

Templates help standardise and speed up performance agreement creation. Benefits include: - Consistency - Reduced setup time - Easier administration - Better scalability Templates are especially useful in large organisations.

### What are People Groups used for?

**People Groups** allow administrators to group employees based on: - Organisational units - Reporting lines - Job roles - Custom criteria They simplify large-scale assignment of performance structures.

### What is the main responsibility of a Performance Management Administrator?

A **Performance Management Administrator** is responsible for configuring and maintaining the performance management environment. This includes: - Managing review setups - Creating templates - Maintaining master data - Configuring sections and ratings - Monitoring performance cycles - Supporting managers and employees Their role ensures the performance process runs efficiently and accurately.