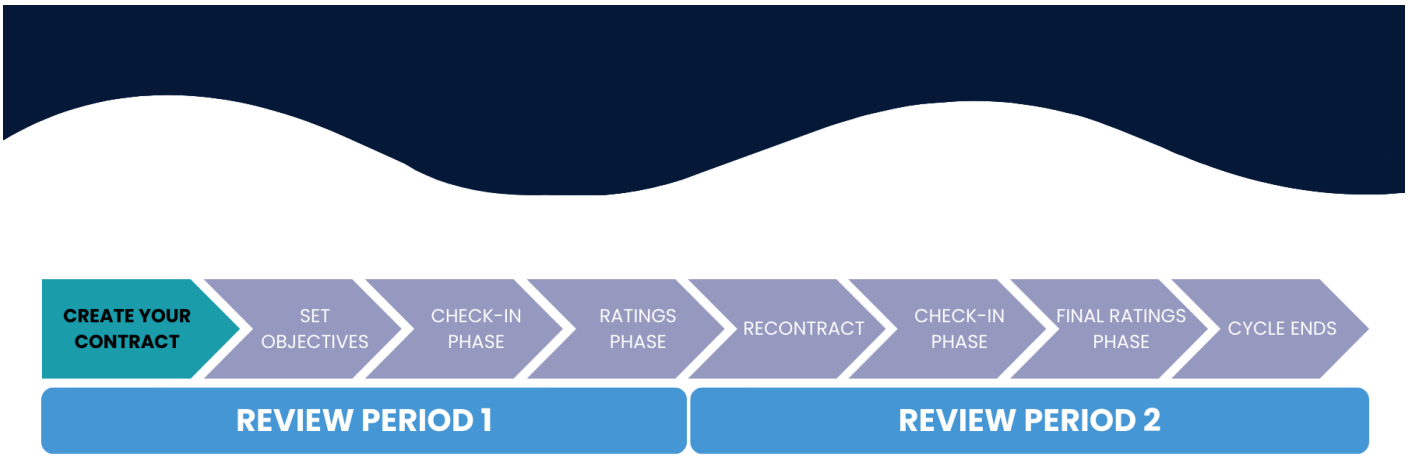
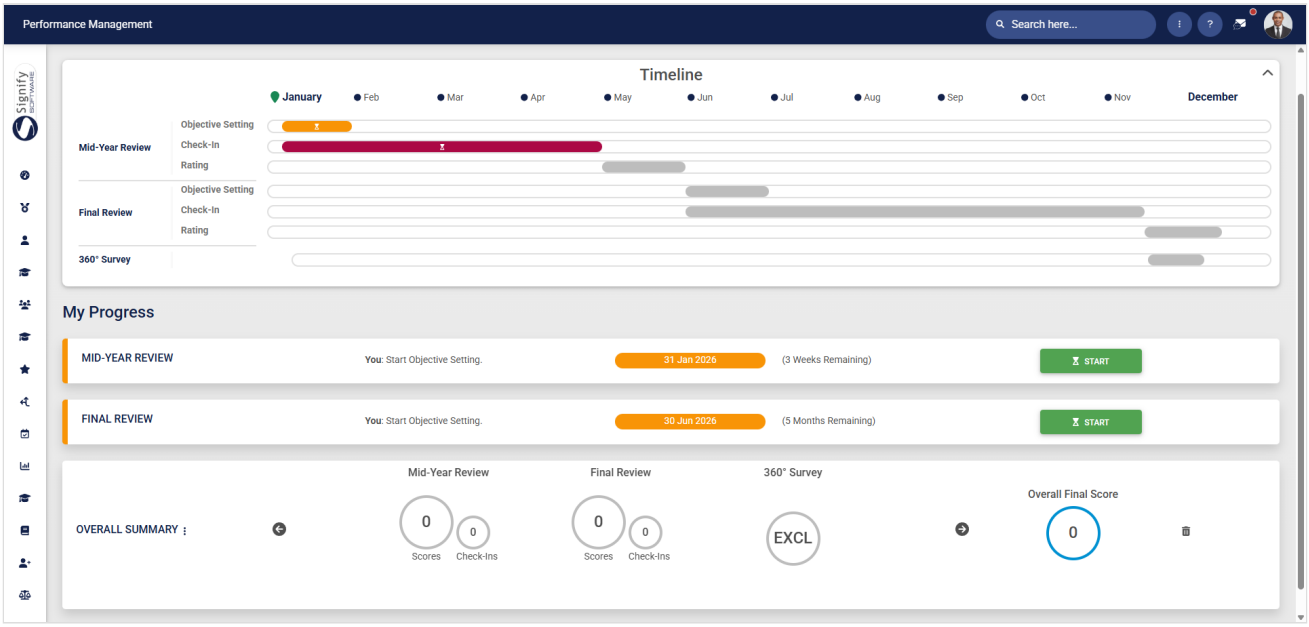
Creating a Performance Agreement



The following section will guide you through creating a performance agreement. The guide assumes you do not have an existing agreement for the current performance cycle and that you wish to create one.

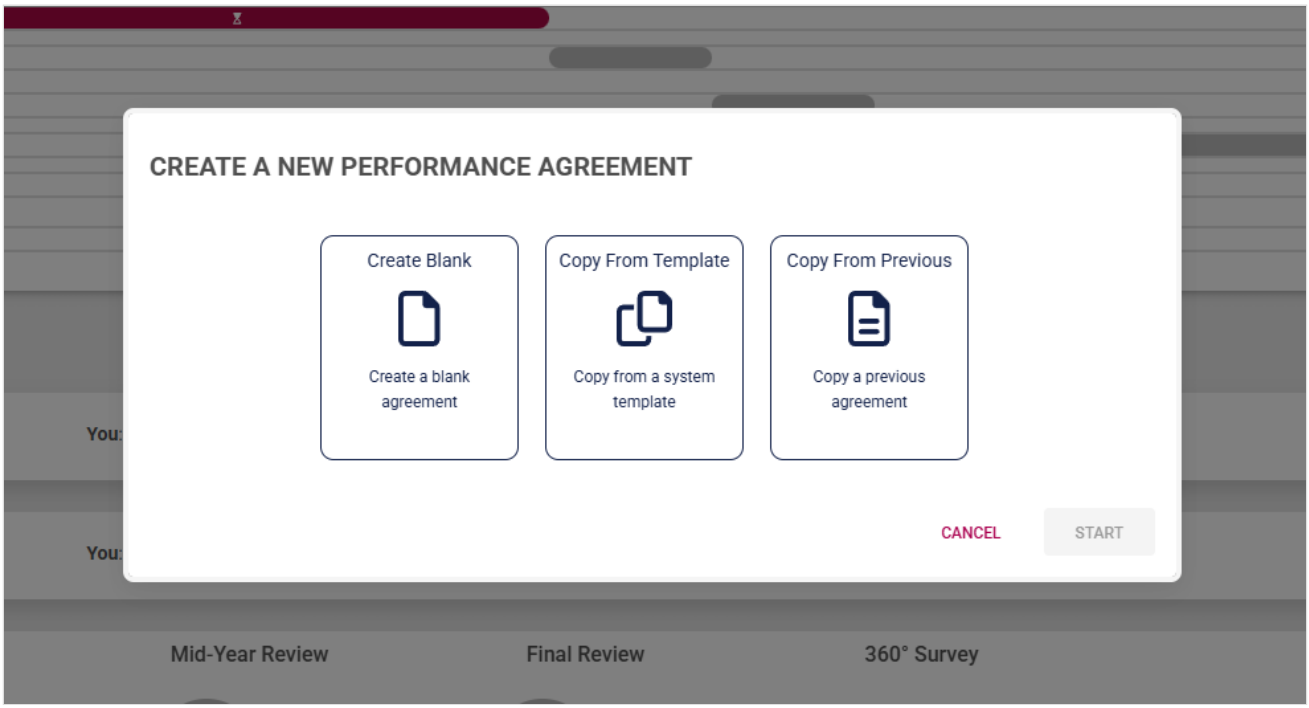
- Begin by navigating to the **Performance Management** dashboard.



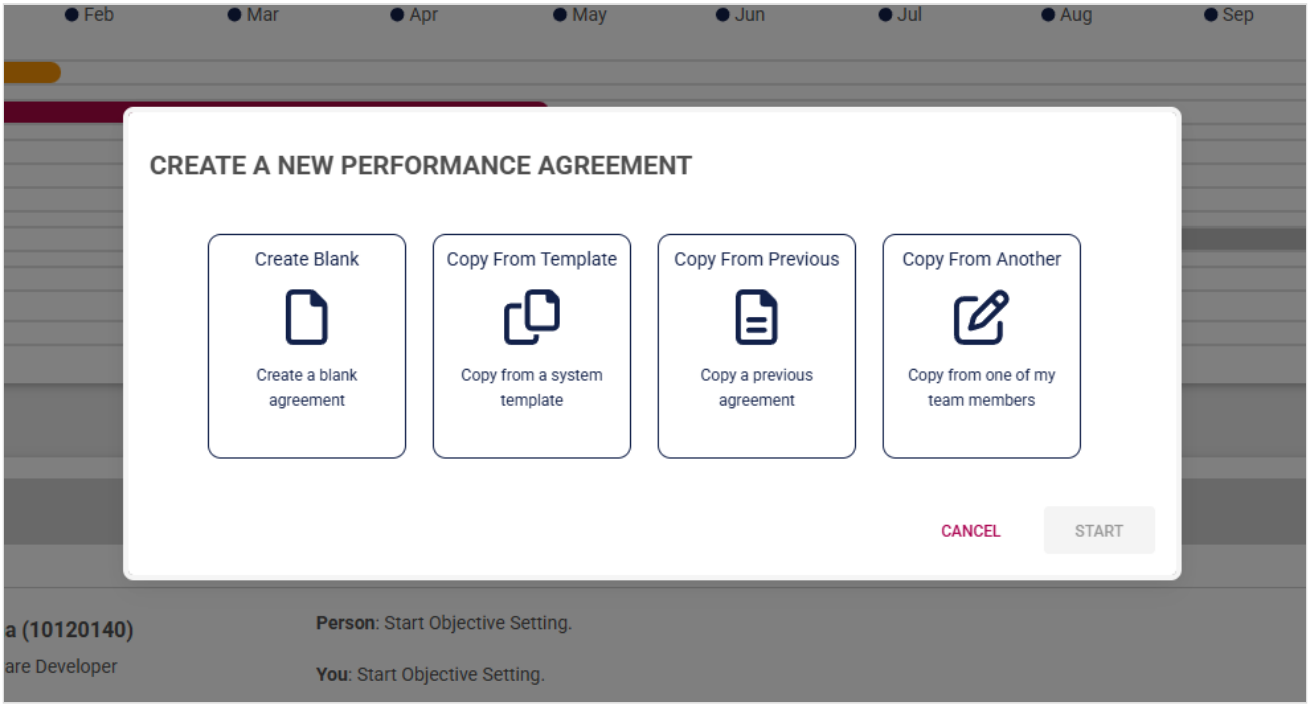
- Click **START** to create a new performance agreement.



- The **Performance Management** module allows a performance agreement to be created in three ways for employees.



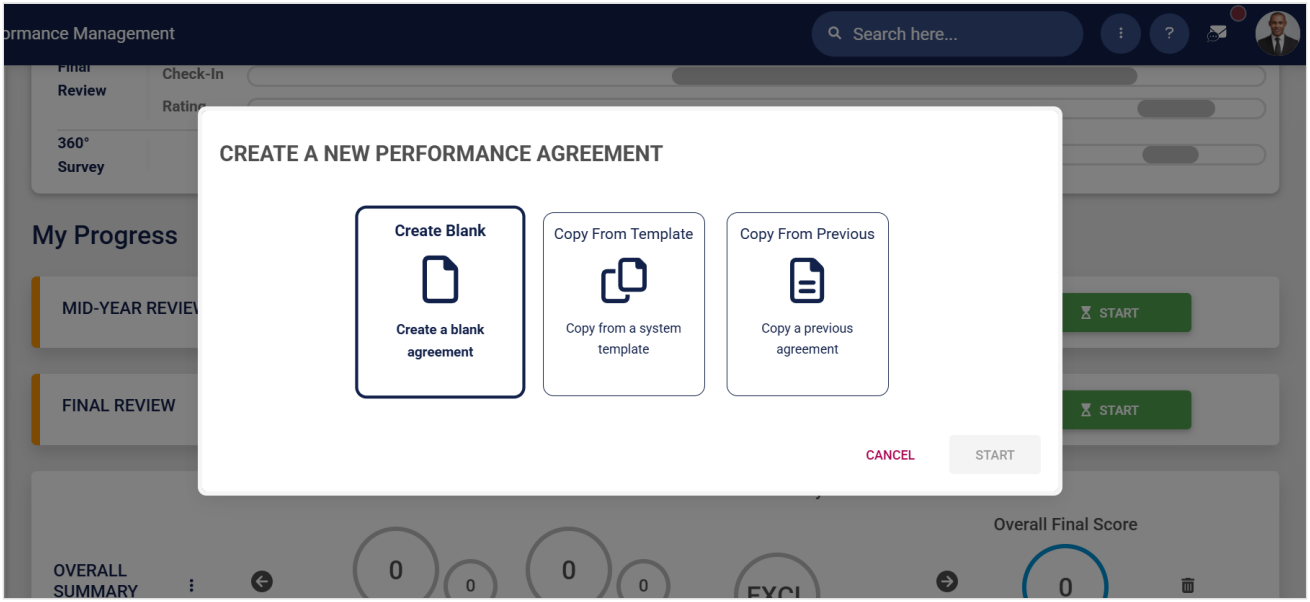
- Managers are offered an additional option to create a performance agreement for a reportee using a template from another team member.



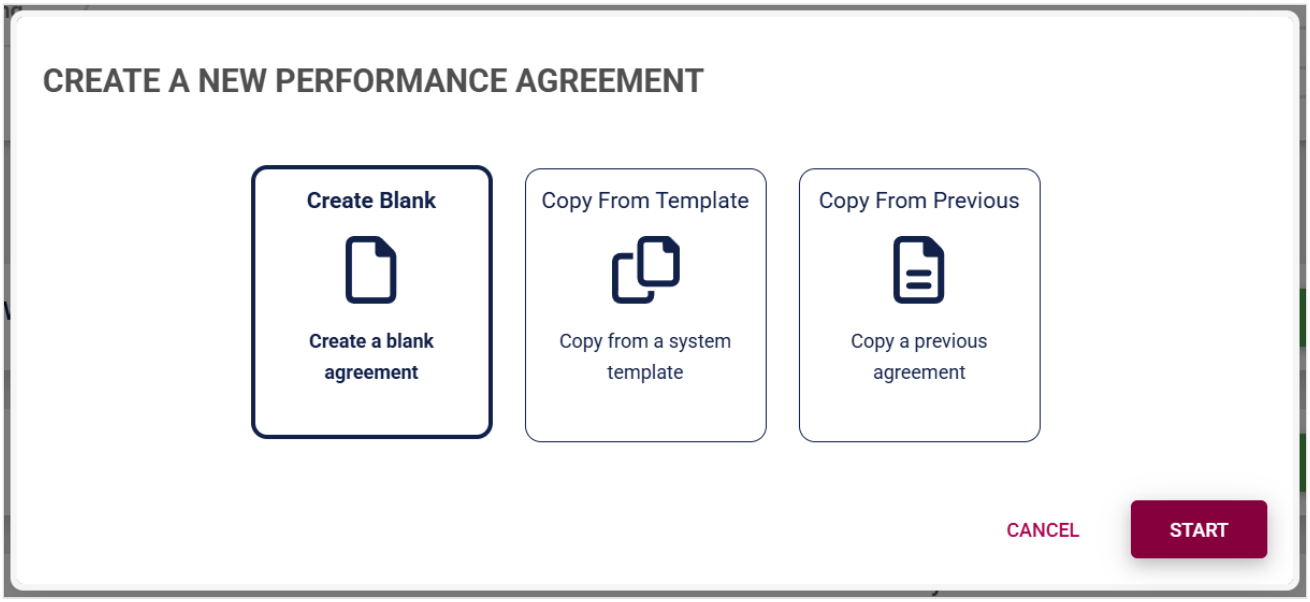
Click on the following tabs to expand the step-by-step instructions.

Create a blank agreement

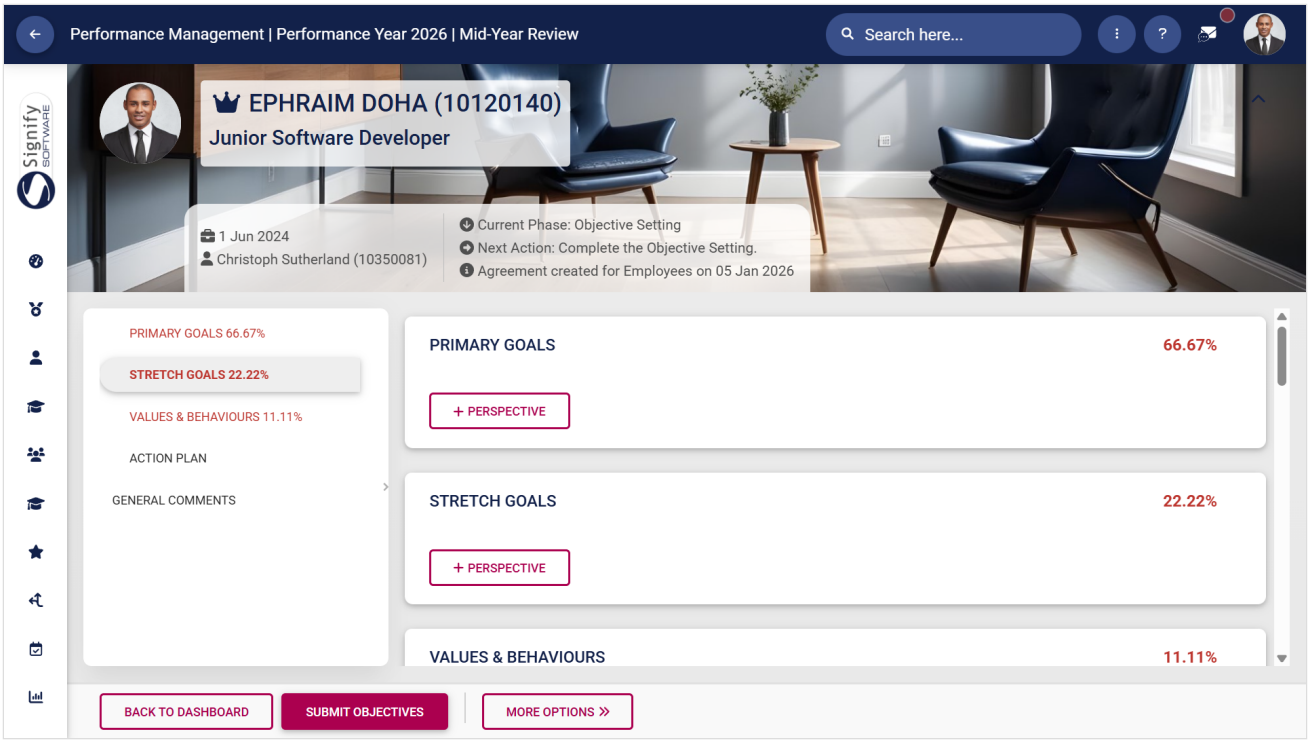
- Click **Create Blank** to start creating a performance agreement from the beginning.



- Click **START**.

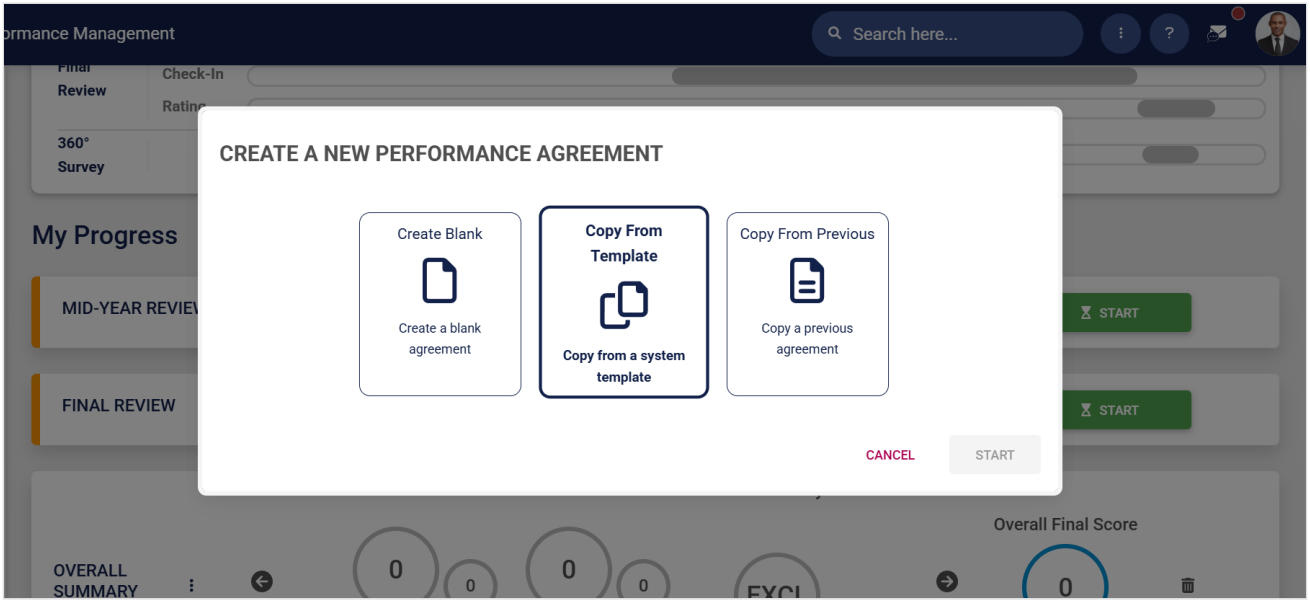


- The performance agreement screen will display, showing the different sections, though it won't include any objectives at this stage. Adding objectives is covered in the next section.

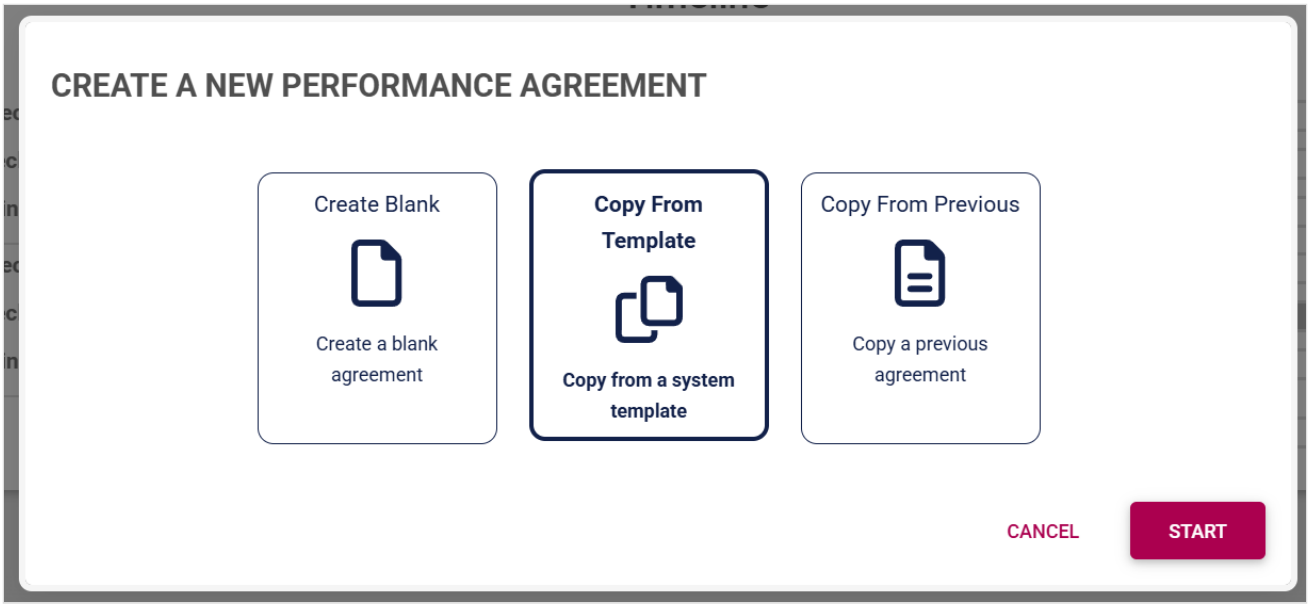


Use a performance agreement template

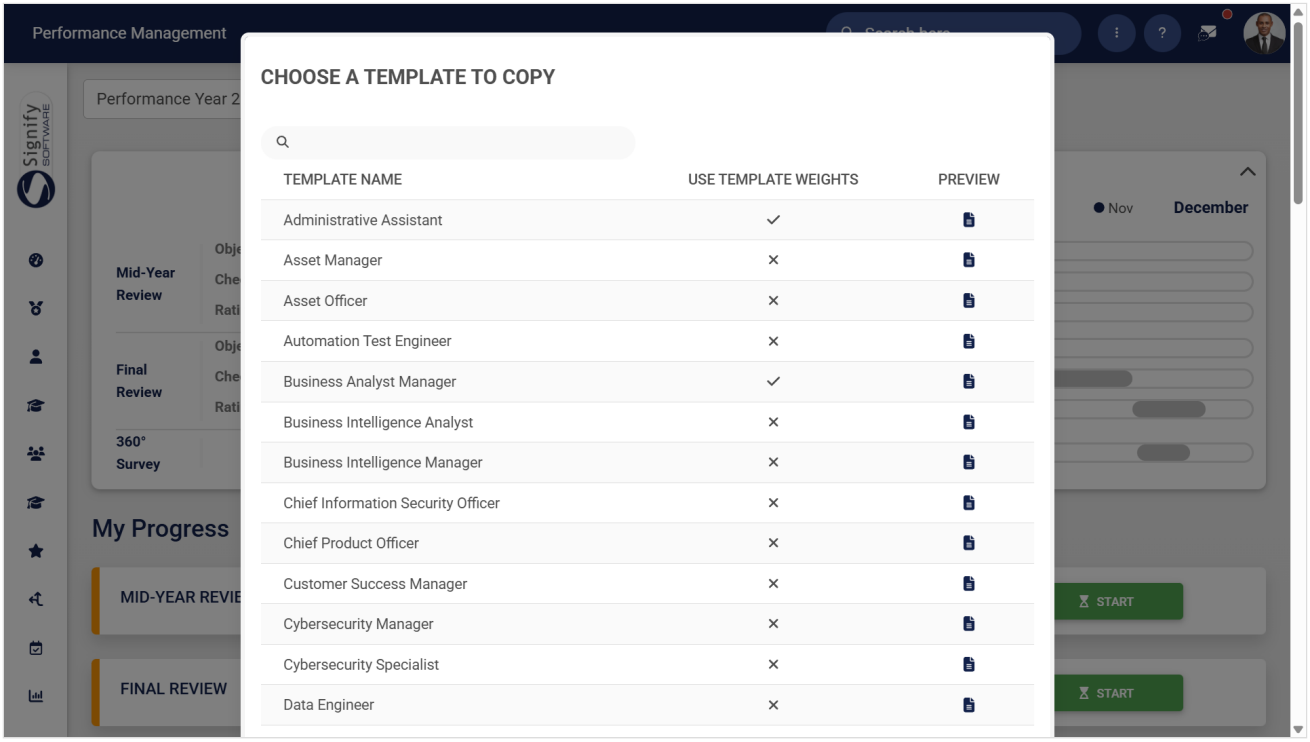
- Click **Copy From Template** to create a performance agreement based on a system template.



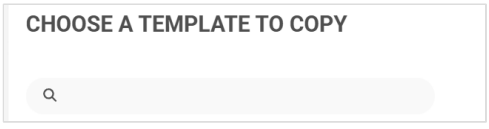
- Click **START**.



- A list of the templates currently on the system will be shown.



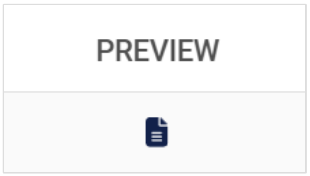
  - Use the search bar to search for a template based on a job title or specific keywords.



  - A **tick** will be displayed if the template's weights override the review setup's weights. A **cross** indicates that the review setup's weights will be used.



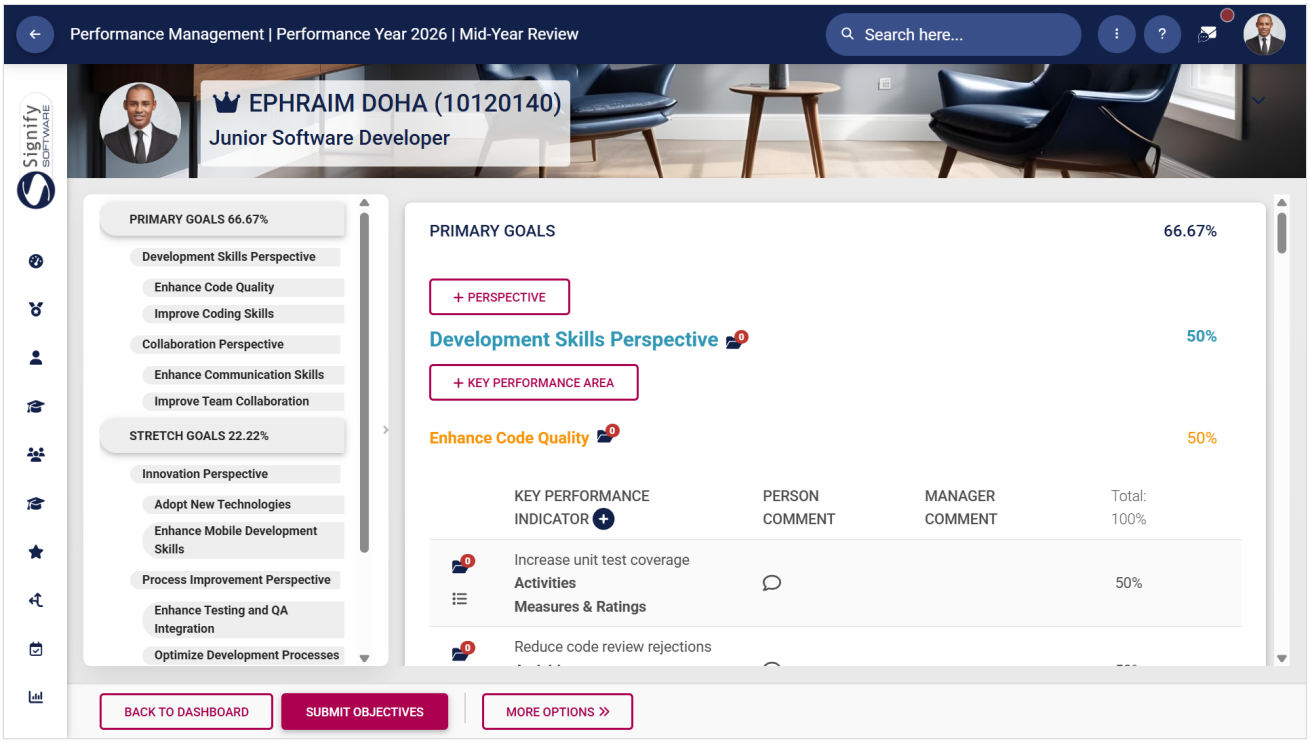
- To ensure you select the correct template, click the **PREVIEW icon** to view. The preview will open in a new tab.



- Choose a template you would like to copy, then click **CREATE**.

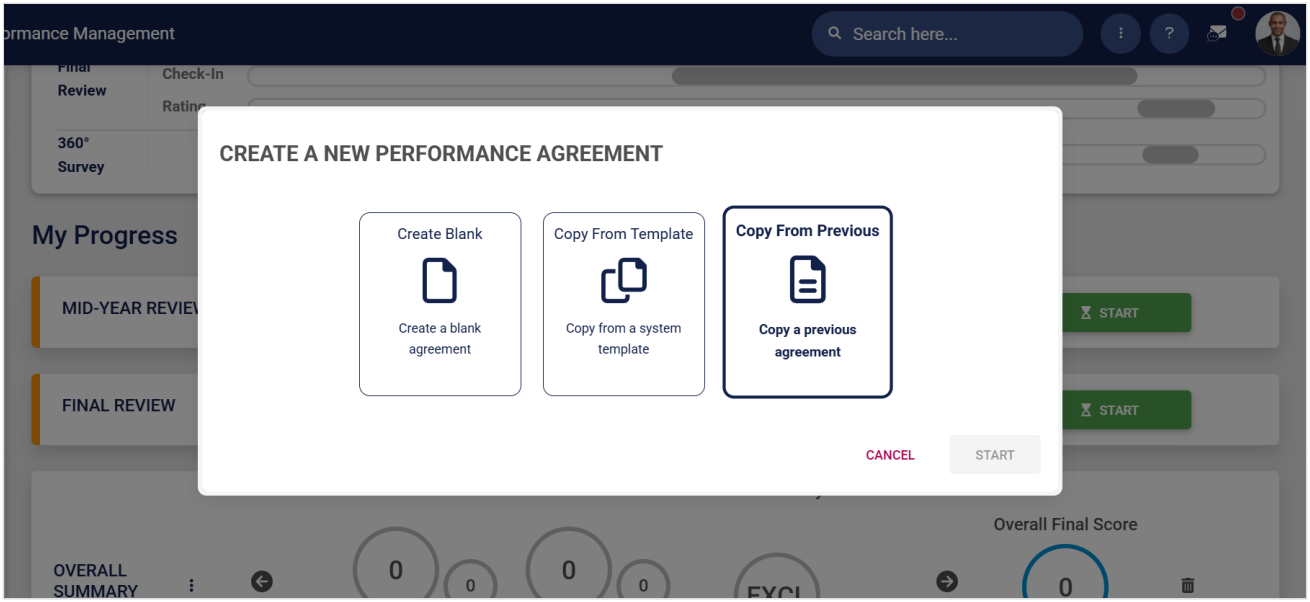


- The performance agreement screen will display, with the **Perspective**, **Key Performance Area**, and **Key Performance Indicator** fields filled in from the template.

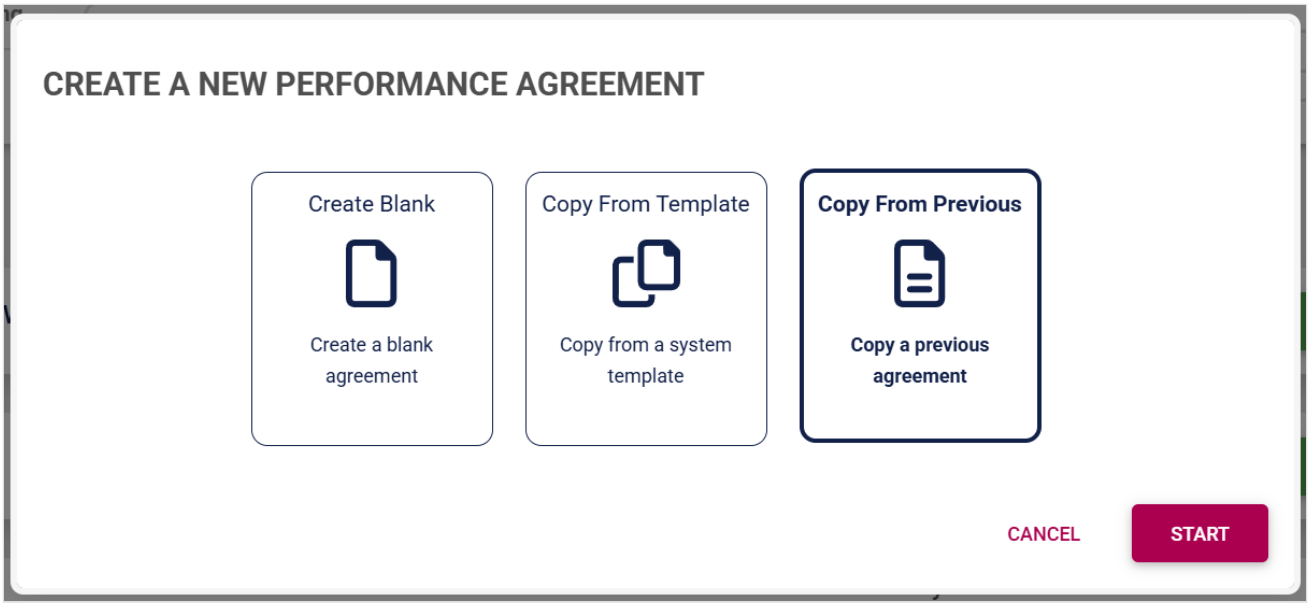


Copy from a previous agreement

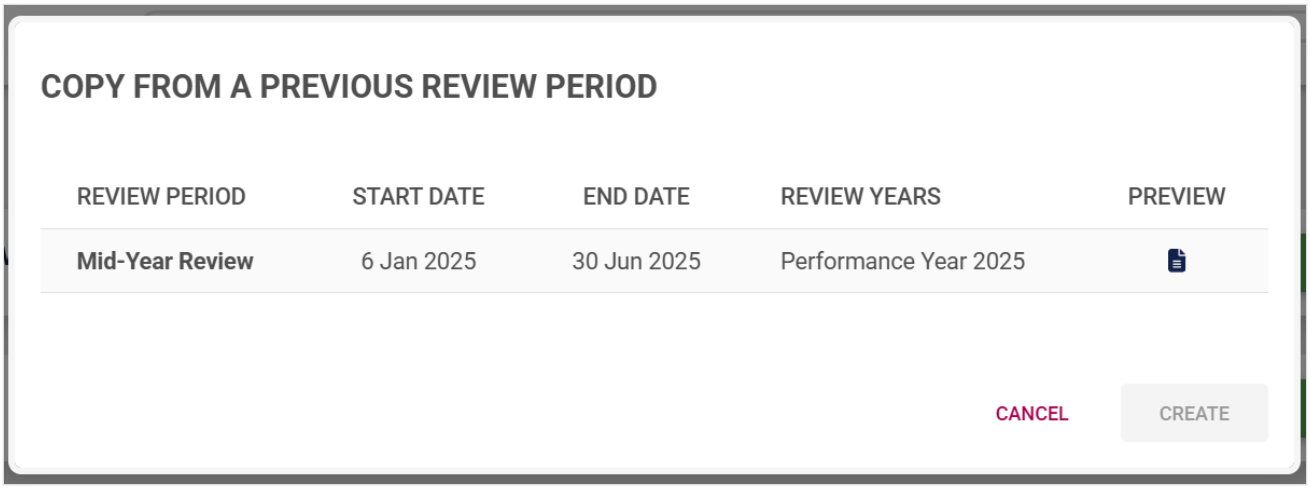
- Click **Copy From Previous** to create a performance agreement based on an agreement from a previous performance cycle.



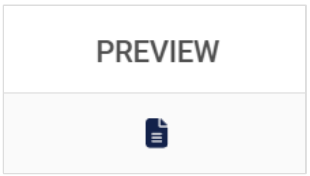
- Click **START**.



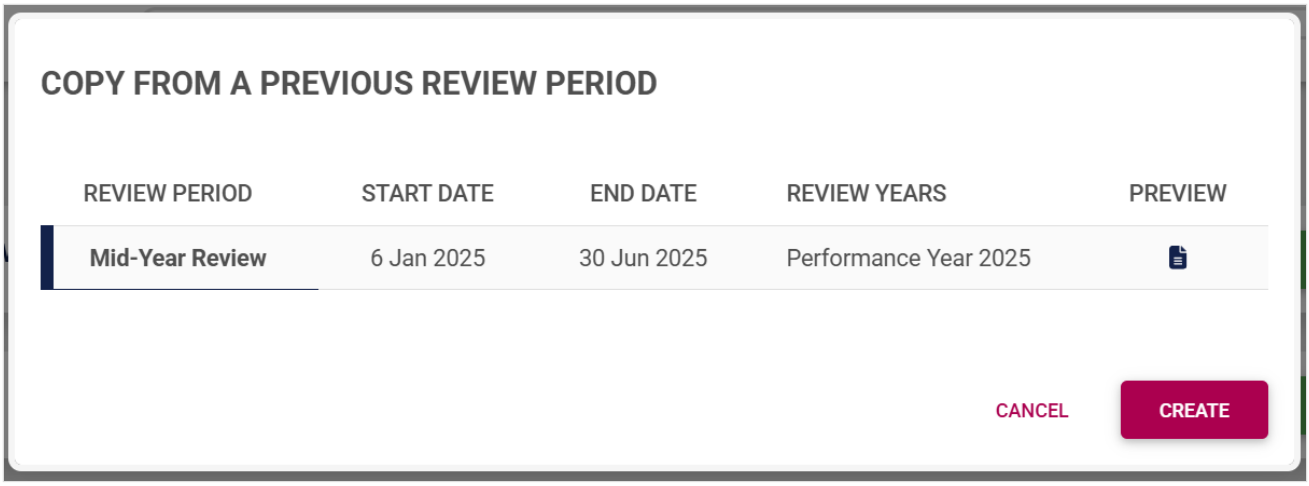
- A list of the performance agreements from previous review periods will be shown.



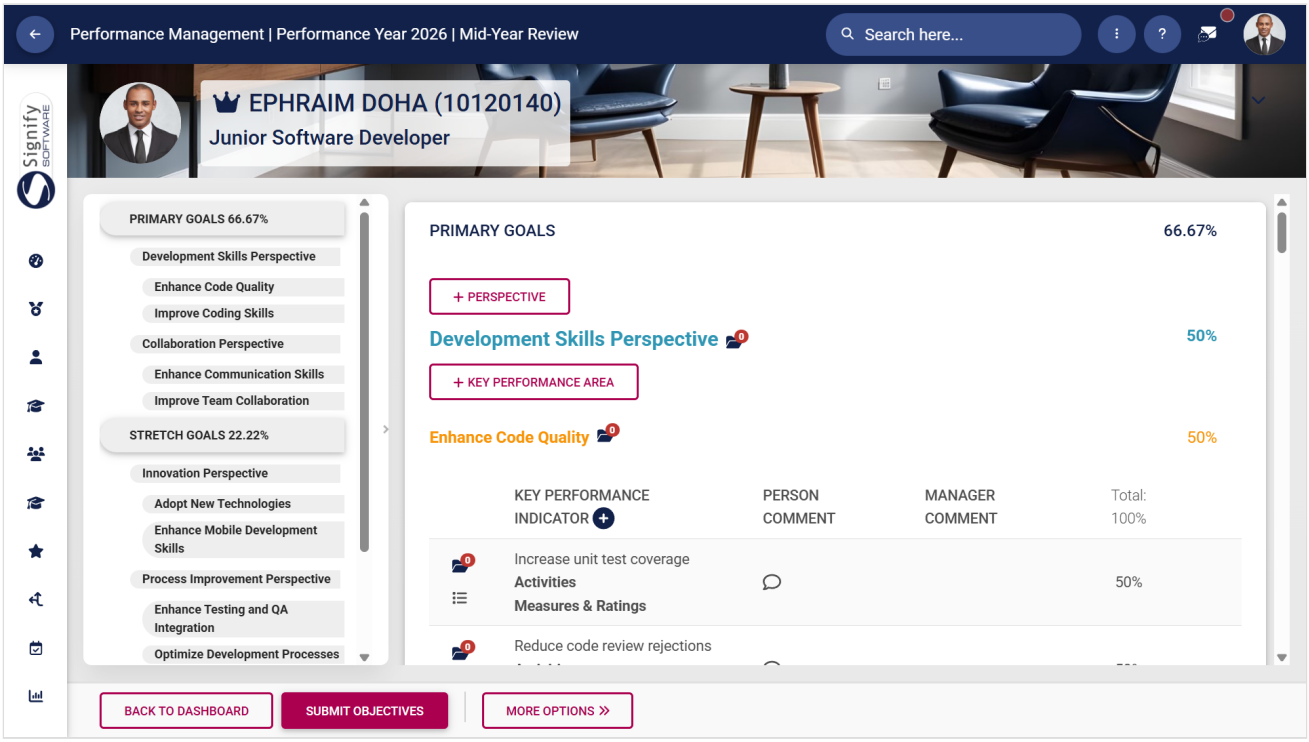
  - To ensure you select the correct performance agreement, click the **PREVIEW icon** to view. The preview will open in a new tab.



- Select the performance agreement you would like to copy, then click **CREATE**.

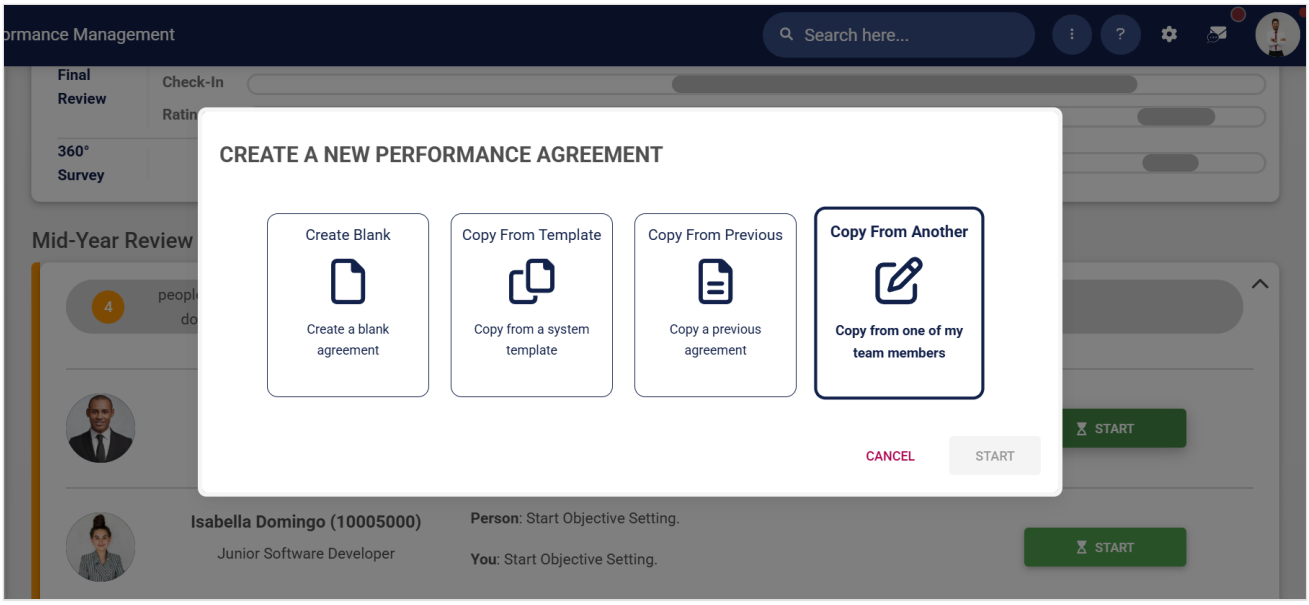


- The performance agreement screen will display, with the **Perspective**, **Key Performance Area**, and **Key Performance Indicator** fields filled in from the previous agreement.

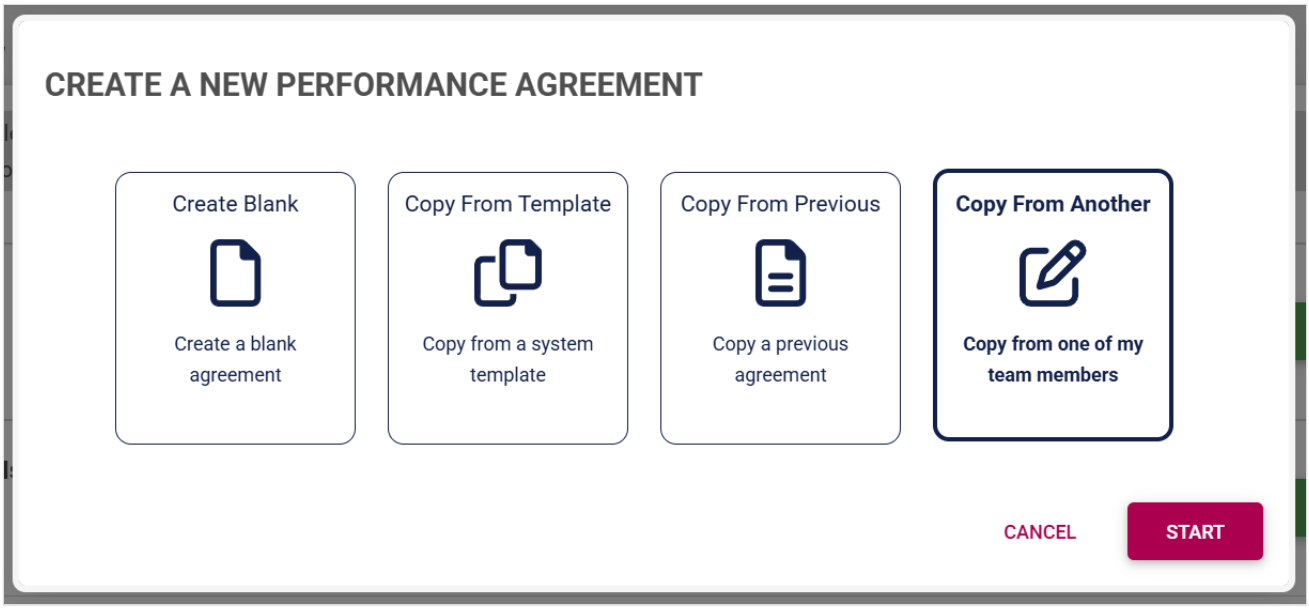


Copy an agreement from another employee (Managers only!)

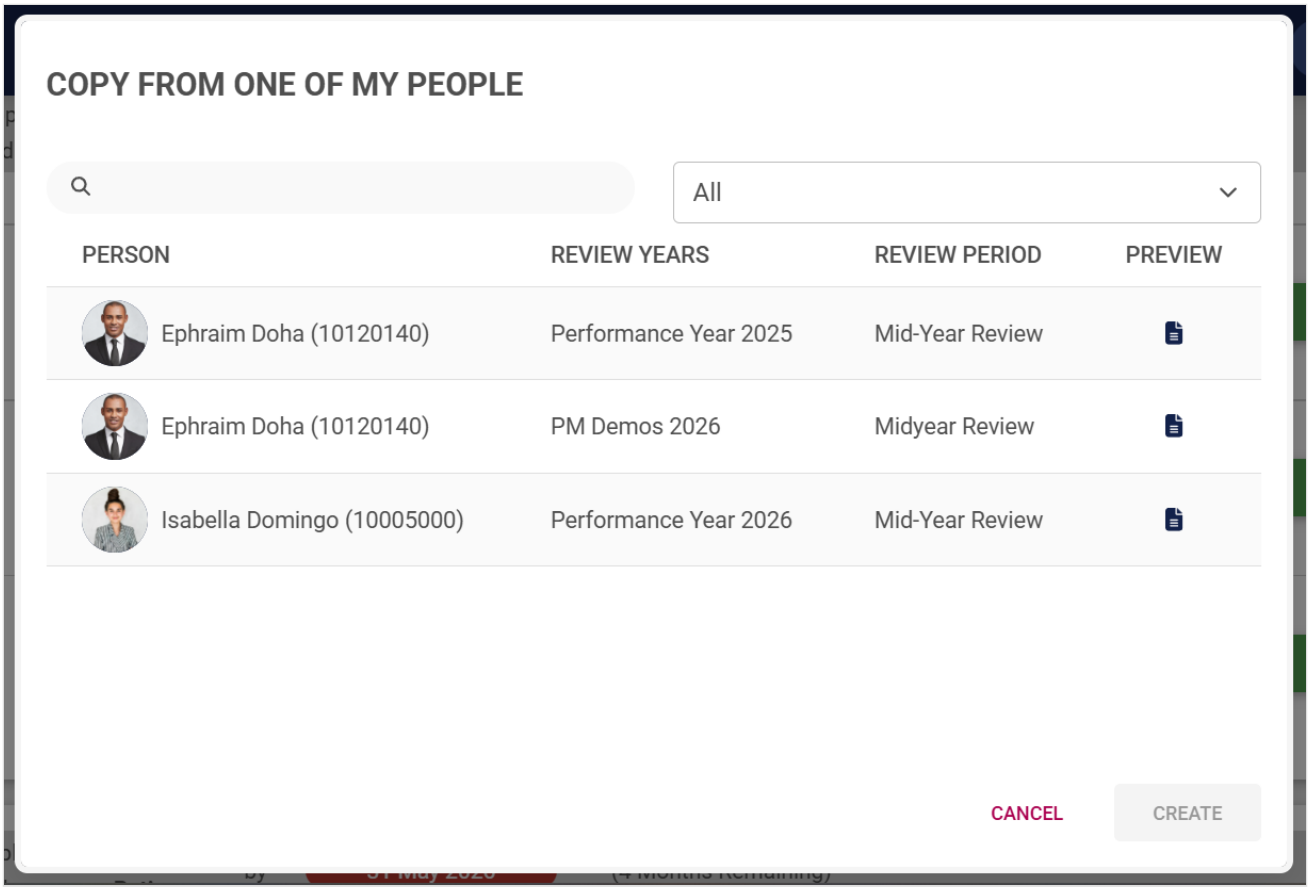
- Click **Copy From Another** to create a performance agreement based on another employee's agreement.



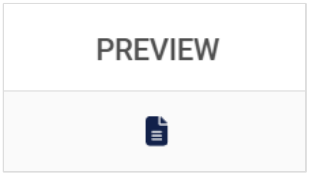
- Click **START**.



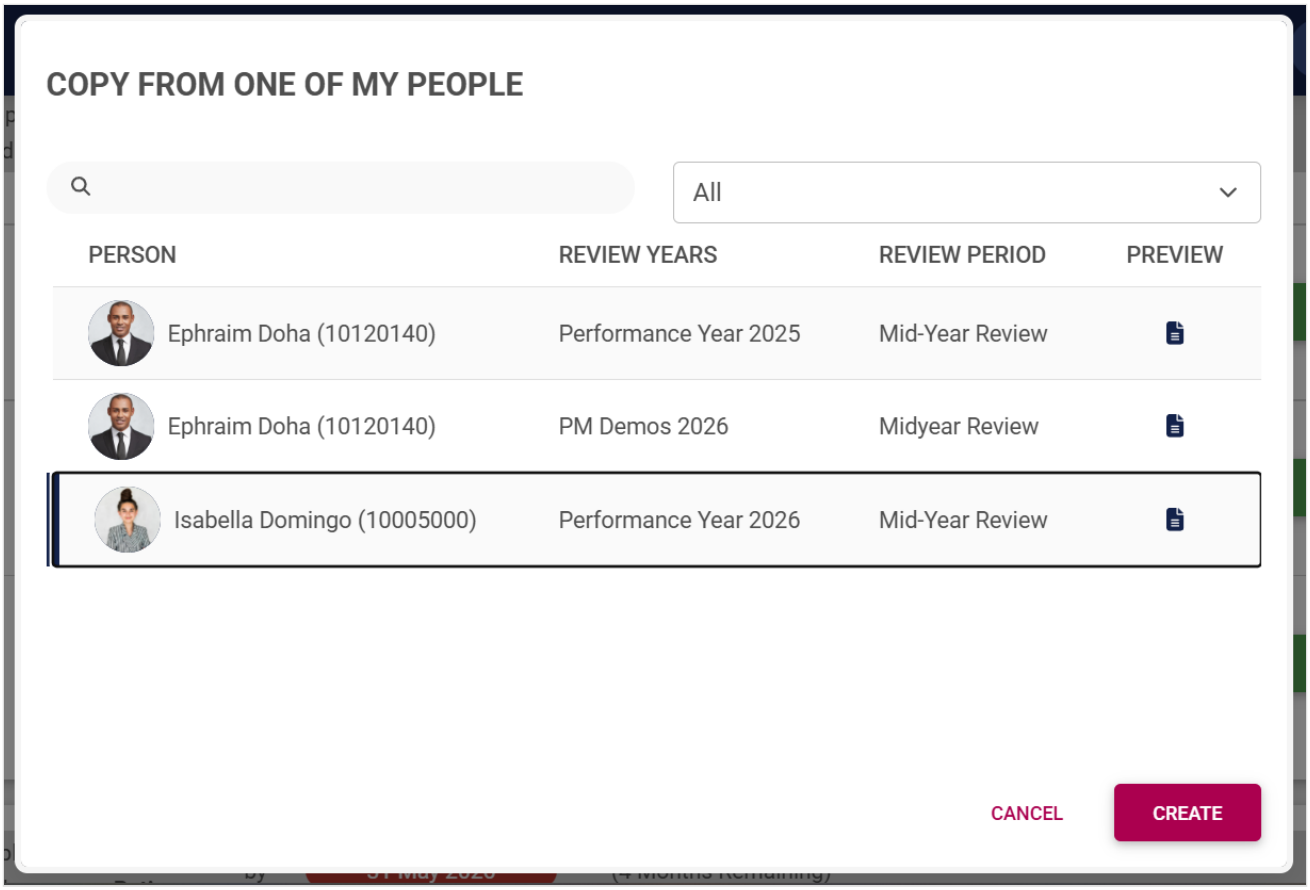
- A list of the other employees in your team's performance agreements will be shown. These agreements are from the current and previous review periods.



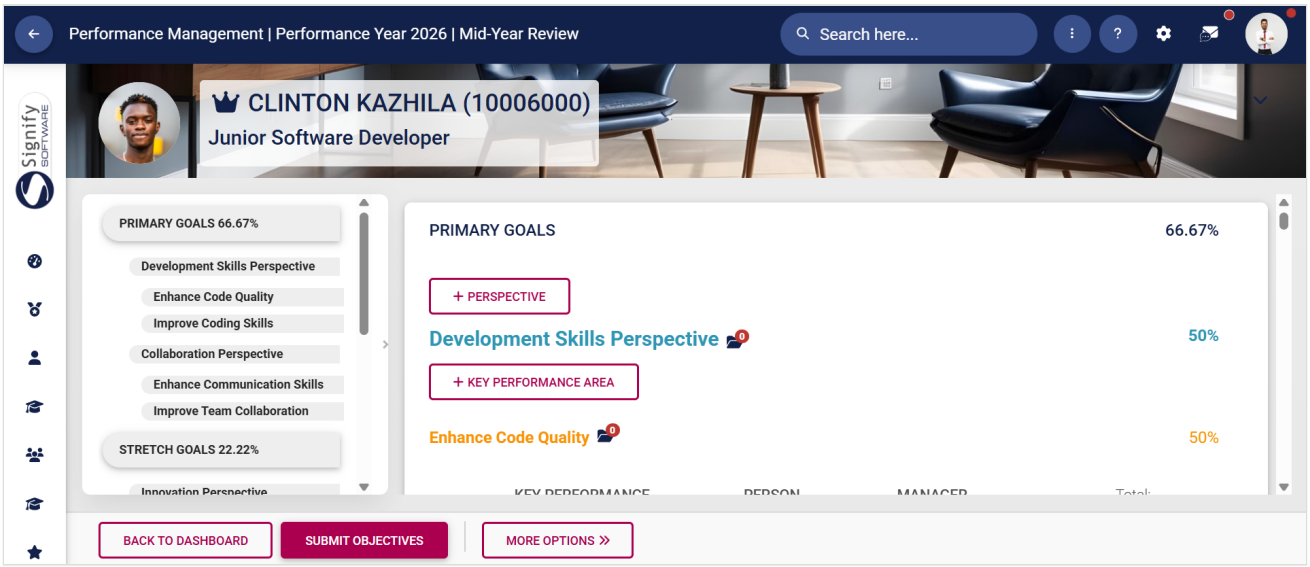
- To ensure you select the correct performance agreement, click the **PREVIEW icon** to view the agreement. The preview will open in a new tab.



- Select the performance agreement you would like to copy, then click **CREATE**.



- The performance agreement screen will display, with the **Perspective**, **Key Performance Area**, and **Key Performance Indicator** fields filled in from the other employee's performance agreement.



Your feedback matters! How helpful was the support content?

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Created 2025-02-03 13:41:25 UTC by Chanan Stenden
Updated 2026-06-23 18:33:57 UTC by Carla Botha