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.

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