Chapter 4: How to

- How To's and FAQs

How To's and FAQs

Topics Addressed

PERFORMANCE MANAGEMENT DASHBOARD

- What are all the fields on the dashboard there for?
- How do I select the performance year?
- How do I know what to do with an existing Performance Contract?
- How do I create a new blank Performance Contract?
- Why can't I create a new performance contract, or work on an existing contract?
- How do I copy a Performance Contract from one of my colleagues?
- How do I use an old contract for a new performance year?
- How do I start a new contract using a template from the library?
- How do I delete a review period on a contract?
- I want to re-open my agreement, but the **MODIFY OBJECTIVES** button on the dashboard is disabled. What must I do?
- In the setup, there are three items (2 reviews and one survey) but on my dashboard, I can only see one review period. Why?
- How can I see my team's contracts?
- Where can I see the contracts of my indirect employees?

PERFORMANCE AGREEMENT (GENERAL)

- How do I change the section weights on my Performance Agreement?
- How do I include/exclude an assessment period from being scored?
- How do I link an action to a KPI?
- How do I submit my agreement objectives to my manager?
- How do I (as manager) approve the agreements of my employees?

PERFORMANCE AGREEMENT (SECTIONS)

- How do I add a KPA?

- How do I add a KPI?
- How do I attach a document to an item on my agreement?
- How many KPAs should I have in my Performance Agreement?
- What is the purpose of the Measures field (part of a KPI)?
- What is the purpose of the Rating / Target field (part of a KPI)?
- How do I balance my perspectives, KPAs and KPIs?
- How do I balance my agreement sections?
- How do I add/remove a Company Value?
- How do I add/remove a Leadership Behaviour?
- How do I add/remove a Key Competency?

CHECK-INS

- What is a check-in used for?
- How do I check in on an objective?
- How do I change a comment left on a user's objective check-in?
- How can I reply to my manager's check-in feedback?

PERFORMANCE AGREEMENT (RATING OF OBJECTIVES)

- I am busy scoring my first assessment/review period, but then I realised one of the objectives on my Performance Agreement changed substantially in character. What is the best approach?
- How do I include/exclude a KPI from being scored?
- How do I submit my self-rated agreement objectives to my manager?
- How do I finalise a review period of my employees (that is, after doing the personal rating and final rating) ?

Q: What are all the fields on the dashboard there for?

A: The dashboard fields help you to:

> Select the correct performance year

> Select the appropriate team of people (if you are a manager)

> Be aware of the timelines

>

> Know your progress in a review period

> See the results of a review period - if available

Click **here** for more details.

Q: How do I select/change the performance year?

A: Use the performance year dropdown at the top of the page.

Click **here** for more details.

Q: How do I know what to do with an existing contract?

A: Use the progress messages in each review period to determine what to do if you already have an existing contract.



Click **here** for more details.

Q: How do I create a new blank Performance Contract?

A: Firstly, decide if starting with a blank Performance Contract is your best course of action. Refer to the contract creation options for an overview. Start creating the contract and then select the **Create Blank** option.

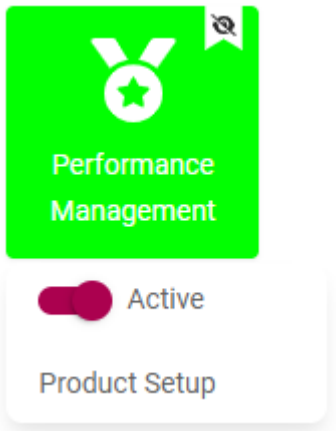
Click **here** to learn about your options.

Click **here** for more details on creating a blank contract.

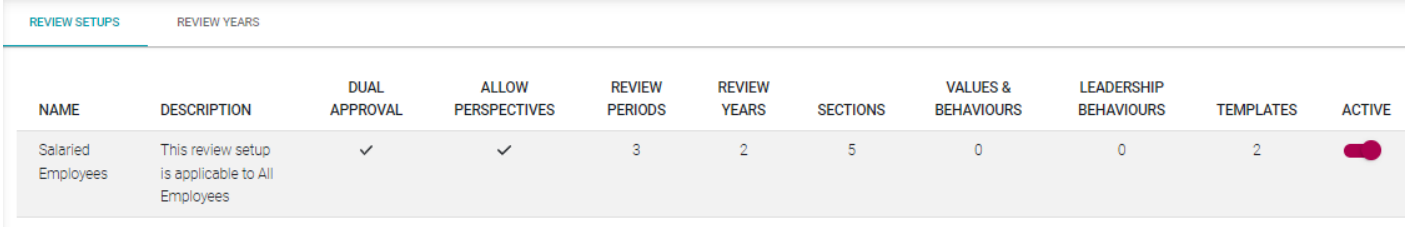
Q: Why can't I create a new Performance Contract, or work on an existing contract?

A: There are a few possible reasons why you might not be able to create a new Performance Contract or work on an existing contract. See below for a list.

1. The Performance Management Product is not active. (Settings | Product Setup | Performance Management | Active)



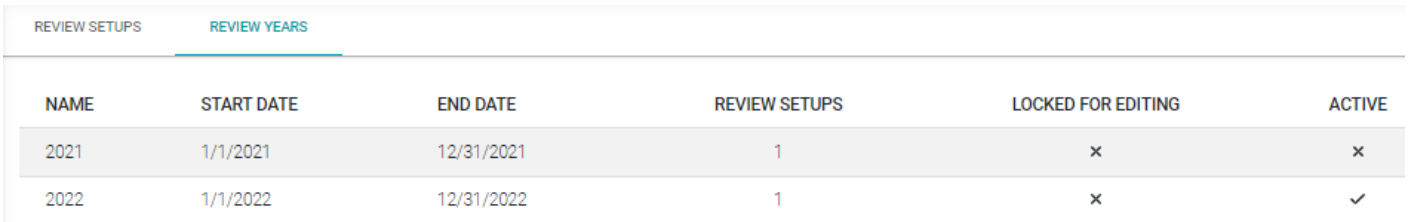
2. The Performance Management Product's review setup is not active. (Settings | Product Setup | Performance Management | Product Setup | Review Setup | Active)



3. The current review period is not active. (Settings | Product Setup | Performance Management | Product Setup | Review Setups | Review Items | Review Period | Active)



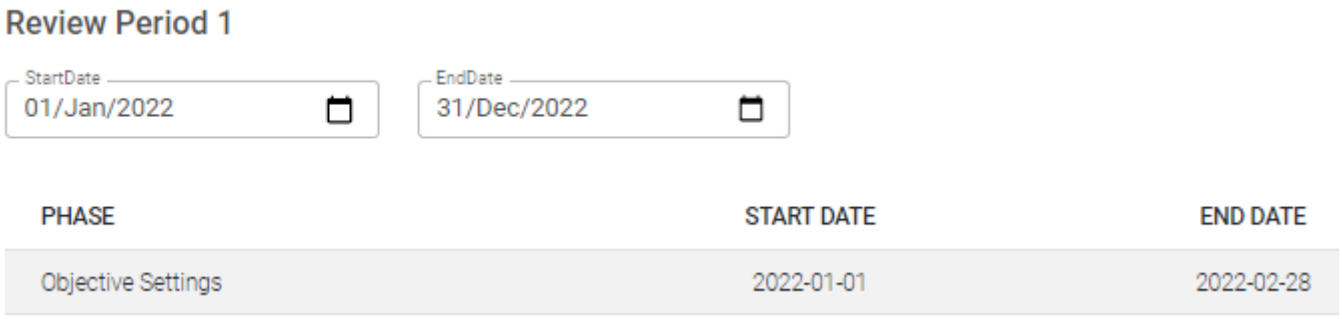
4. The current review year has not yet reached its starting date, is not (yet) active, or is perhaps temporarily locked for editing. (Settings | Product Setup | Performance Management | Product Setup | Review Years | Active)



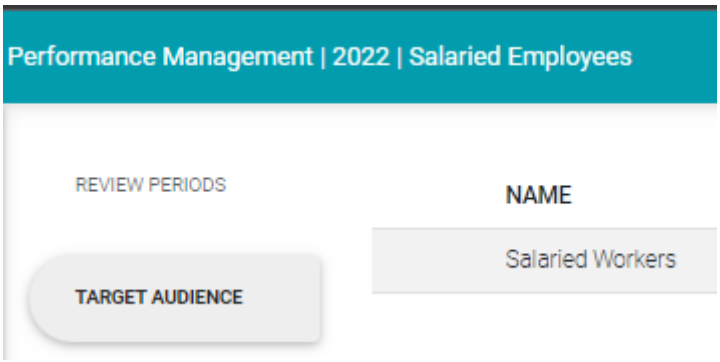
5. The current review year has not yet been linked to a Review Setup. (Settings | Product Setup | Performance Management | Product Setup | Review Years | Review Setups)



6. The current review year's period dates were not properly configured. (Settings | Product Setup | Performance Management | Product Setup | Review Setups | Review Periods)



7. You are not part of the target audience for Performance Management and therefore don't have access to the product, i.e., you cannot see the Performance Management menu on the main menu to the left of the screen. (Settings | Product Setup | Performance Management | Product Setup | Review Setups | Target Audience)



8. You don't have a performance manager assigned to you. Contact your performance administrator for assistance.

Q: How do I copy a Performance Contract from one of my colleagues?

A: You need your manager's assistance to copy a colleague's contract.

Click **here** for more details.

Q: Can I use an old Performance Contract for a new performance year?

A: You can copy the old contract to the new year and amend its contents as needed. You cannot change an old contract's performance year to a new year. Start creating the contract and then select the **Copy from Previous** option.

Click **here** for more details.

Q: How do I create a new Performance Contract using a template from the library?

A: Start creating the contract and select the **Copy from Template** option. Search the library using appropriate key words. Use the **Preview** icon to check the template contents before creating the contract.

Click **here** for more details.

Q: How do I delete a review period on a contract?

A: Look for and click the **DELETE** icon in the applicable review period. Confirm your intention by providing a reason and acknowledging the deletion.



> Your Performance Contract's number of review periods is fixed. Therefore, clicking the **DELETE** button below does not delete the review period, it clears out all objectives you may have loaded into any section on your agreement from the chosen review period.

Q: I want to re-open my agreement, but the **MODIFY OBJECTIVES** button on the dashboard is disabled. What must I do?

A: Once your manager approves your agreement, the **MODIFY OBJECTIVES button** is disabled. The solution needs two steps.

1. Ask your manager to click **MODIFY OBJECTIVES** on your contract from his/her Performance Management Dashboard.
2. Then, you have to click **MODIFY OBJECTIVES** on your contract, from your Performance Management Dashboard.

Click **here** for more details.

Q: In the setup of the Performance Management module, a performance year has three items (2 reviews and one survey), but on my dashboard, I can only see one review period. Why?

A: If the configuration of the Performance Management module is changed after people started creating contracts, existing contracts might not necessarily be changed accordingly. A Performance Contract is created with certain parameters defined in the configuration; if the configuration is changed the contract is not. Ask your Performance Administrator for assistance, but it will probably entail the removal of your Performance Contract and the creation of a new contract.

FOR THE PERFORMANCE MANAGEMENT ADMINISTRATOR: During the configuration of the performance management product, you have to do the following steps in this exact order.

1. Create a new Review Setup.
2. Add all the review items (review periods) at once. I.e. not one now and another later on.
3. Create a new Review Year.
4. In the review year's Review Setup, link a review setup comprising the three review items. If the review items are changing after the linking took place, there will be a mismatch. Delink the review setup and relink it again.

Q: Where can I see my team's contracts?

A: Every employee - who is part of the performance management process - can see their performance management dashboard and performance years. A manager can also see the teams they are responsible for by switching between their dashboard, and those of the teams.

Look for the toggle button at the top of your performance dashboard to switch between your own contacts and the contacts of your team.



Click **here** for more details.

Q: Where can I see the contracts of my indirect employees?

A: Yes, it will be possible, but only in the next version.

Q: How do I change the section weights on my Performance Agreement?

A: The default section weights are automatically assigned when a contract is created, or even when a performance template is used to create a new contract. Sometimes users are not allowed to change the default section weights, but if they are allowed, here are the steps.

- At the bottom of the Performance Agreement screen, look for and click the button **EDIT SECTION WEIGHTS**.
- Change the section weights as needed, ensuring they add up to 100%.
- Save the popup screen.

Click **here** for more details.

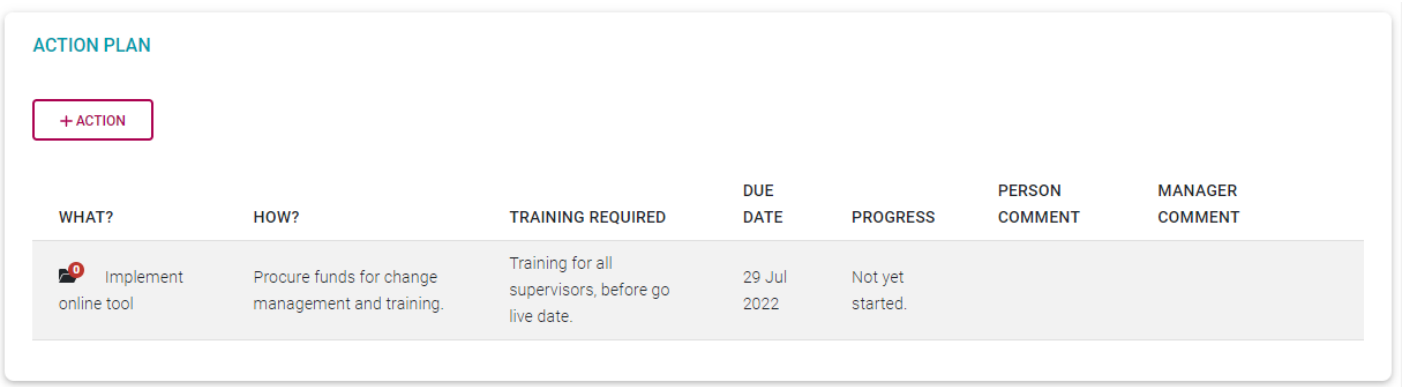
Q: How do I include/prevent a review period from being scored?

A: Yes, it will be possible, but only in the next version.

Q: How do I link an action to a KPI (or any other objective item)?

A: It is possible to link actions to objective items, but after being added, note they are all grouped under the Action Plans menu item.

1. Go to the objective item to which you would want to add an action.
   
2. Click the objective's **More/Action** icon.
3. Complete the Action screen's details and click **SAVE**.



Click **here** for more details on a KPI-specific action.

Click **here** for more details on a generic action.

Q: How do I submit my agreement objectives to my manager for approval?

A: Besides adding the objectives to your agreement; and balancing the section and objective percentages to separately add up to 100%, you only need to click the button **SUBMIT OBJECTIVES** to:

- Close the agreement for editing on your side.
- Send a notification to your manager requesting approval.
- Allow your manager to consider and approve your objectives.

Carefully take note if any verification messages require your attention

Click **here** for more details.

Q: How do I (as manager) approve the agreed-on objectives of my employees?

A: After discussing and confirming the objectives with an employee, you only need to click the button **SUBMIT OBJECTIVES** to:

- Prevent further editing of the agreement.
- Send a notification to the employee, communicating your approval.
- Open the agreement for check-ins on objectives (if activated and within the set time limits), and prepare the agreement for the rating phase (which will open at a set time).

Take note if any verification messages require your attention.

Click **here** for more details on how employees will submit their objectives.

Click **here** for more details on how a manager will approve the objectives of an employee.

Q: How do I add a KPA?

A: The assumption is you have already managed to create a Performance Contract, and you find yourself on either the Key Performance Areas or Stretch Targets (if using) sections.



1. If the Perspectives level is switched on, click the **+PERSPECTIVE** button and choose an appropriate perspective.

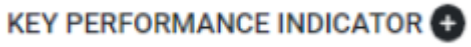


2. Once loaded, click the **+KEY PERFORMANCE AREA** button to start adding a KPA.

Click **here** for more details.

Q: How do I add a KPI?

A: The assumption is you have already managed to create a performance contract and you have added a perspective and a KPA.



1. Under the loaded perspective and KPA, click the **+KEY PERFORMANCE INDICATOR** button to start adding a KPI.

Click **here** for more details.

Q: How do I attach a document to an item on my agreement?

A: Documents can be attached to most items on your Performance Agreement. Look for the **Document** icon next to an item and click to open the **Document View and Upload** screen, which lists existing documents and allows the upload of new documents.

Click **here** for more details.

Q: How many KPAs should I have in my Performance Contract?

A: In the Key Performance Areas section, the system requires at least one KPA and KPI under a perspective (if using). It does not enforce a maximum number of KPAs, although suggestions range from a maximum of five KPAs up to ten, depending on job complexity.

Q: What is the purpose of the Measures field (part of a KPI)?

A: Click **here** for more details and examples.

Q: What is the purpose of the Target/Rating field (part of a KPI)?

A: Click **here** for more details and examples.

Q: How do I balance the weights of the perspectives, KPAs and KPIs?

A: The goal is as follows:

- The total weight of all the perspectives must = 100%
- The total weight of all KPAs under a perspective must =100%
- The total weight of all KPIs under each KPA must = 100%

Click **here** for more details.

Q: How do I balance the agreement sections?

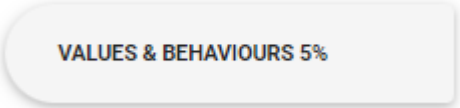
A: The goal is for the total weight of all sections to equal 100%. At the bottom of the agreement screen is a button **EDIT SECTION WEIGHTS**, allowing the user to see all the section weights in one place and change them as needed.

Note, only change the section weights after a discussion with your manager as they are predefined for a company.

Click **here** for more details.

Q: How do I add/remove a Company Value (Values & Behaviours)?

A: On the agreement screen, use the navigation menu on the left and click **Values & Behaviours**



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Usually, values and behaviour items are automatically added to every new Performance Contract, but should you need to add or remove an item, use the **LINK VALUE & BEHAVIOURS** button or the **DELETE BUTTON**.

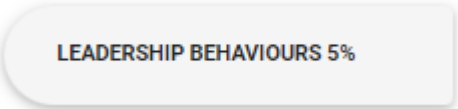




Click **here** for more details.

Q: How do I add/remove a Leadership Behaviour?

A: On the agreement screen, use the navigation menu on the left and click **Leadership Behaviours**.



Usually, leadership behaviour items are automatically added to every new Performance Contract, but should you need to add or remove an item, use the **LINK LEADERSHIP BEHAVIOURS** button or the **DELETE** button.

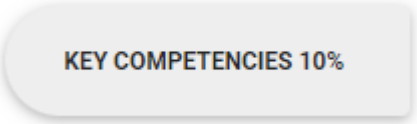




Click **here** for more details.

Q: How do I add/remove a Key Competency?

A: On the agreement screen, use the navigation menu on the left and click **Key Competencies**.



Key competencies are sometimes (depending on company preferences and configuration) automatically added to every new Performance Contract but should you need to add or remove key competencies, use the **LINK KEY COMPETENCIES** button or the **DELETE** button.





Click **here** for more details.

Q: What is a Check-in used for?

A: The Check-in functionality is a bridge between the Objective Setting phase and the Review phase. Once a Performance Agreement is approved (usually at the beginning of the performance year) it is locked until it is time for the review, which usually happens at the end of each review period. Between these two phases, a manager and employee could do regular evaluations or check-ups on the employee's objectives to correct and guide performance as needed.

Click **here** for more details.

Q: How do I check in on an objective? (Manager's perspective)

A: A manager will take the initiative to check in on an objective and will take this approach.

1. Locate the employee's contract on which the check-in is to be conducted.
2. Click the **CHECK-IN** button.



3. Go through the employee's list of objectives and choose one to evaluate. Click its record to open the Check-in feedback screen.
4. Use the **Rating** toggle button to indicate current progress sentiment i.e. **On Track** or **Not On Track**.
5. Use the comments fields (**My Comments** and **Private Comments**) to give guidance and direction on the objective.
6. Click **SAVE** when done.

Click **here** for more details.

Q: How do I change a check-in comment on a user's objective?

A: Only the last check-in comment can be edited.

1. Return to the objective having the comment and click its record to open it.
2. On the Check-in feedback screen, locate and click the link **EDIT LAST COMMENT** to open the comment field.
3. Make the change and click **SAVE**.

Click **here** for more details.

Q: How can I reply to my manager's check-in feedback?

A: Comments loaded on an objective's check-in record can be viewed, but no email notifications are sent.

1. Return to the objective having the comment and click its record to open it.
2. On the Check-in feedback screen, locate and click the link **EDIT LAST COMMENT** to open the comment field.
3. Make the change and click **SAVE**.

Click **here** for more details.

Q: I am busy scoring my first assessment/review period, but then I realised one of the objectives on my Performance Agreement changed substantially in character. What is the best approach?

A: Here are two scenarios to consider.

Scenario 1 - The objective that was changed, is a KPA.

Solutions:

Quickest: Leave the KPA (and its KPIs) as is but EXCLUDE the KPI(s) when scoring them. This will not affect the assessment period score. Then, after creating the next review period, MODIFY the agreement and amend the objective(s). Approve everything again. At the start of every subsequent review period, there is an opportunity for re-contracting.

Longer route: If you have to amend the KPA and/or KPI(s) before scoring, ask your manager to MODIFY the assessment period, then MODIFY the assessment period from your side as well. The objectives will now be open for editing, but you will have to amend them and then re-submit the agreement and get it re-approved by your manager.

Scenario 2 - The objective that was changed, is not a KPA (e.g., it is a Key Competency or a Company Value)

Solutions:

Since only the KPA objectives can be excluded when scoring, you have the following options.

Quickest: Give the objective the average section score - not affecting the section score. Remember to provide an explanatory note for your scoring decision. Then, after creating the next review period, MODIFY the agreement and amend the objective(s). Approve everything again. At the start of every subsequent review period, there is an opportunity for re-contracting.

Longer route: If you have to amend the objective, ask your manager to MODIFY the assessment period, then MODIFY the period from your side as well. The objectives will now be open for editing, but you will have to amend them and then re-submit the agreement and get it re-approved by your manager.

