

# Version 9.1.45 (25 October 2023)

## Performance Management

### Change the settings to make the Self-Rating visible (#108924)

The settings on the Review Setup were update in order to make the approved Self-Rating visible to the Manager during the ratings phase.

The screenshot shows the 'Performance Management | General Employees' setup page. The left sidebar contains navigation links for DETAILS, REVIEW ITEMS, SECTIONS, and TEMPLATES. The main content area has a 'Name' field set to 'General Employees' and a 'Description' field with the text 'This review setup is applicable to General Employees'. Below this is a blue box titled 'The items/levels on a Performance Contract are named as:' containing a bulleted list: 'Perspective (highest level categorisation)', 'Key Performance Area (Second level categorisation)', and 'Key Performance Indicator (Lowest level item. These items are rated/scored)'. Further down are several toggle and radio button settings. The 'Dual participation' toggle is turned on. The 'Allow Perspectives' toggle is turned off. The 'The next Review Period can only start when the previous one has been completed' toggle is turned on. Under the 'Person Self-Rating and Manager Rating must be approved before Final Rating can be completed' section, the radio button 'Show person's approved Self-Rating to manager only once the manager has approved the Manager Rating' is selected. The radio button 'Show person's approved Self-Rating to manager regardless of the Manager Rating approval status' is also visible. The radio button 'Manager Rating and Final Rating can be completed simultaneously (Final Rating can only be approved once the person Self-Rating has been approved)' is highlighted with a red box. The radio button 'Only show the Final Rating column, and hide the Manager Rating column' is also visible. A 'SAVE' button is at the bottom left.

### Change the Dual Participation translation on the Review Setup linking to the shortened heading

A translation was added for Dual Participation heading when linking a Review Setup to the Review Years.

Link Review Setup									
NAME	DESCRIPTION	DUAL PARTICIPATION	ALLOW PERSPECTIVES	REVIEW PERIODS	REVIEW YEARS	SECTIONS	VALUES & BEHAVIOURS	LEADERSHIP BEHAVIOURS	
Monthly Performance Management Setup	Monthly Performance Management Setup	✓	✗	12	0	2	5	4	

CANCEL LINK REVIEW SETUP

The numbering of Perspectives on the agreement is removed to match the index (#109038)

Performance Management | 2023 - Bi-Annual Performance Review | Final Review

JOE BLACK (22552)  
Accounts Manager

1 Jan 2022  
Susan Parrish (22553)

Current Phase: Objective Setting  
Next Action: Complete the Objective Setting.  
Agreement created for General Employees on 26 May 2022

PRIMARY GOALS 50%

Customer Services

Brilliant relationships  
Operational excellence  
Development  
Inspired talent  
Internal business processes  
Company culture  
Finance  
Broaden revenue mix  
Manage Expenses

STRETCH GOALS 20%

Finance  
Profit/Efficiencies

PRIMARY GOALS

+ PERSPECTIVE

Customer Services

+ KEY PERFORMANCE AREA

Brilliant relationships

KEY PERFORMANCE INDICATOR

PERSON COMMENT

Total: 100%

Achieve client interaction matrix with minutes and actions after each interaction	Measures & Ratings	40%
Achieve customer operational contact matrix	Measures & Ratings	20%
Draft and Implement Joint Business Plans with Client	Measures & Ratings	10%
Keep mining costs below R500 per ton	Measures & Ratings	30%

My Comments

BACK TO DASHBOARD VIEW / PRINT EDIT SECTION WEIGHTS SUBMIT OBJECTIVES

Hide the Check-In dial when the Check-In Phase is inactive (#108978)

Added a check to ensure that when the Check-In Phase is made inactive on the Review Year, the dial is also not shown on the Overall Summary of the Dashboard.

**Review Year:**

Performance Management | Performance Year | Bi-Annual

Search here...

REVIEW PERIODS

Mid-Year Review

50.00%

TARGET AUDIENCE

Start Date: 2023/01/01

End Date: 2023/06/30

PHASE	START DATE	END DATE	ACTIVE	DEADLINE NOTIFICATION DAYS	IGNORE PHASE END DATE
Objective Setting	2023-02-01	2023-05-31	<input checked="" type="checkbox"/>	7	
Check-Ins			<input type="checkbox"/>	14	
Ratings			<input type="checkbox"/>	14	

Performance Dashboard:

Performance Management

Search here...

Performance Year

MY PERFORMANCE CONTRACT

MY TEAM IN BI-ANNUAL

MY TEAM IN ALL EMPLOYEES

Timeline

January

Feb

Mar

Apr

May

Jun

Jul

Aug

Sep

Oct

Nov

December

Mid-Year Review

Objective Setting

Rating

Final Review

Objective Setting

Rating

Value Survey

My Progress

MID-YEAR REVIEW

You Arrange a meeting with your manager to discuss the Final Rating

Manager: Arrange a meeting with the Person to discuss the Final Rating

View

FINAL REVIEW

You Complete the Objective Setting and submit to your manager

30 Nov 2023

(1 Month Remaining)

Continue

OVERALL SUMMARY

Mid-Year Review

Final Review

Value Survey

Overall Final Score

3.00

Scores

0.00

Scores

EXCL

1.50