

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' configuration page. The 'DETAILS' section shows the name 'General Employees' and a description 'This review setup is applicable to General Employees'. A blue box lists the items/levels on a Performance Contract: Perspective (Highest level categorisation), Key Performance Area (Second level categorisation), and Key Performance Indicator (Lowest level item, These items are rated/scored). The settings include: Dual participation (disabled), Allow Perspectives (disabled), Allow manager to override who will approve and rate (disabled), Allow managers and employees to edit review survey scores (disabled), The next Review Period can only start when the previous one has been completed (disabled), Person Self-Rating and Manager Rating must be approved before Final Rating can be completed (selected), Show persons approved Self-Rating to manager only once the manager has approved the Manager Rating (disabled), Show person's approved Self-Rating to manager regardless of the Manager Rating approval status (disabled), **Manager Rating and Final Rating can be completed simultaneously (Final Rating can only be approved once the person Self-Rating has been approved) (selected)**, and Only show the Final Rating column, and hide the Manager Rating column (disabled). 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 (22533)

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

- Customer Services 25%
- Brilliant relationships 50%

KEY PERFORMANCE INDICATOR

MEASURES & RATINGS	PERSON COMMENT	Total: 100%
Achieve client interaction matrix with minutes and actions after each interaction		40%
Achieve customer operational contact matrix		20%
Draft and Implement Joint Business Plans with Client		10%
Keep mining costs below R500 per ton	My Comments	30%

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:

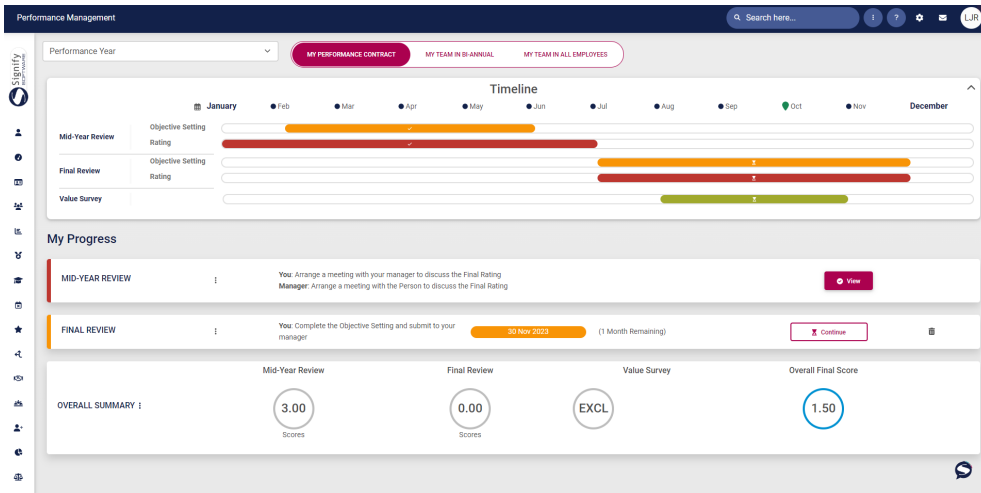
Performance Management | Performance Year | BI Annual

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	<input checked="" type="checkbox"/>
Check-Ins			<input type="checkbox"/>	14	<input checked="" type="checkbox"/>
Ratings			<input type="checkbox"/>	14	<input checked="" type="checkbox"/>

Performance Dashboard:



Revision #2

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