

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'. Below this, a blue box explains the hierarchy: 'The Items/levels on a Performance Contract are named as:' followed by a list: 'Perspective (Highest level categorisation)', 'Key Performance Area (Second level categorisation)', and 'Key Performance Indicator (Lowest level item. These items are rated/scored)'. The settings section includes several toggle and radio button options. A red box highlights the selected option: 'Manager Rating and Final Rating can be completed simultaneously (Final Rating can only be approved once the person Self-Rating has been approved)'. Other options include 'Dual participation - Both employee and manager will take part electronically...', 'Allow manager to override who will approve and rate', 'Allow managers and employees to edit review survey scores', 'Person Self-Rating and Manager Rating must be approved before Final Rating can be completed', 'Show person's approved Self-Rating to manager only once the manager has approved the Manager Rating', 'Show person's approved Self-Rating to manager regardless of the Manager Rating approval status', 'Allow Perspectives', and 'The next Review Period can only start when the previous one has been completed'. 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

Search here...

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 50%
- Brilliant relationships 25%
- 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 | 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%

Start Date: 2023/01/01 | End Date: 2023/06/30

TARGET AUDIENCE

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

Performance Dashboard:

Performance Management

Performance Year: [Dropdown]

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: [Progress bar]
- Rating: [Progress bar]

Final Review

- Objective Setting: [Progress bar]
- Rating: [Progress bar]

Value Survey: [Progress bar]

My Progress

MID-YEAR REVIEW | 1 | Year: 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 | 1 | Year: Complete the Objective Setting and submit to your manager. [30 Nov 2023] (1 Month Remaining) [Continue]

OVERALL SUMMARY | 1

| | | | |
|-----------------|----------------|--------------|---------------------|
| Mid-Year Review | Final Review | Value Survey | Overall Final Score |
| 3.00 Scores | 0.00 Scores | EXCL | 1.50 |

Revision #2

Created 19 October 2023 14:26:43 by Lee-Ann Janse van Rensburg

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