

# Version 9.1.86 (6 May 2024)

## Performance Management

### Employees duplicating on the list when creating agreements in bulk (#114715)

#### Problem

- When using the Bulk Action on Performance Management, a record is created per appointment

#### Solution

- Add a check to ensure that only the latest appointment's record is shown in the list

### Rework calculations to allow periods to be skipped (#106483)

- Add a Setting to enable/disable excluding review periods

DETAILS

REVIEW ITEMS

SECTIONS

TEMPLATES

The items/levels on a Performance Contract are named as:

- Perspective (Highest level categorisation)
- Key Performance Area (Second level categorisation)
- Key Performance Indicator (Lowest level item. These items are rated/scored)

☒ Dual participation - Both employee and manager will take part electronically. If disabled, only the manager will take part electronically.

☒ Allow manager to override who will approve and rate

☒ Allow the Manager 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

☐ Manager Rating and Final Rating can be completed simultaneously (Final Rating can only be

☐ Allow Perspectives

☒ The next Review Period can only start when the previous one has been completed

☐ Hide Scores and Weights during Rating Phase

☒ Allow excluding Review Items

- Remove the eye icon on the gauge and add an on-click to the gauge
  - When hovering over the gauge, a Review Period can be excluded/included

- When clicking on the gauge itself, the agreement is opened

20 Overall Summary

Scarlet White (1206)  
Admin Clerk

Click to Exclude Review Period

Period 1  
3.26 Scores 0 Check-Ins

Period 2  
EXCL Scores 0 Check-Ins

Value Survey  
2.80

Overall Final Score  
3.11

20 Overall Summary

Scarlet White (1206)  
Admin Clerk

Click to view the Agreement

Period 1  
3.26 Scores 0 Check-Ins

Period 2  
EXCL Scores 0 Check-Ins

Value Survey  
2.80

Overall Final Score  
3.11

- Add a click in the gauge only when an agreement exists
  - An agreement can only be accessed in the Overall Summary if the person already has an agreement

Period 1

19 people to do Objective Setting by 31 Mar 2024 (1 Month Overdue)

Thomas Tshabalala (thomas.tshabalala@signify.co.za)  
System Analyst  
Person: In Progress with Objective Setting.  
You: Waiting for the Person to submit Objective Setting. You are also expected to review the Objective Setting.

Continue

Andre Van Rooyen (22287)  
HR Executive  
Person: Start Objective Setting.  
You: Start Objective Setting.

Start

20 Overall Summary

Scarlet White (1206)  
Admin Clerk

Period 1  
3.26 Scores 0 Check-Ins

Period 2  
EXCL Scores 0 Check-Ins

Value Survey  
2.80

Overall Final Score  
3.11

Thomas Tshabalala (thomas.tshabalala@signify.co.za)  
System Analyst

Period 1  
0.00 Scores 0 Check-Ins

Period 2  
0.00 Scores 0 Check-Ins

Value Survey  
EXCL

Overall Final Score  
0.00

Andre Van Rooyen (22287)  
HR Executive

Period 1  
0.00 Scores 0 Check-Ins

Period 2  
0.00 Scores 0 Check-Ins

Value Survey  
EXCL

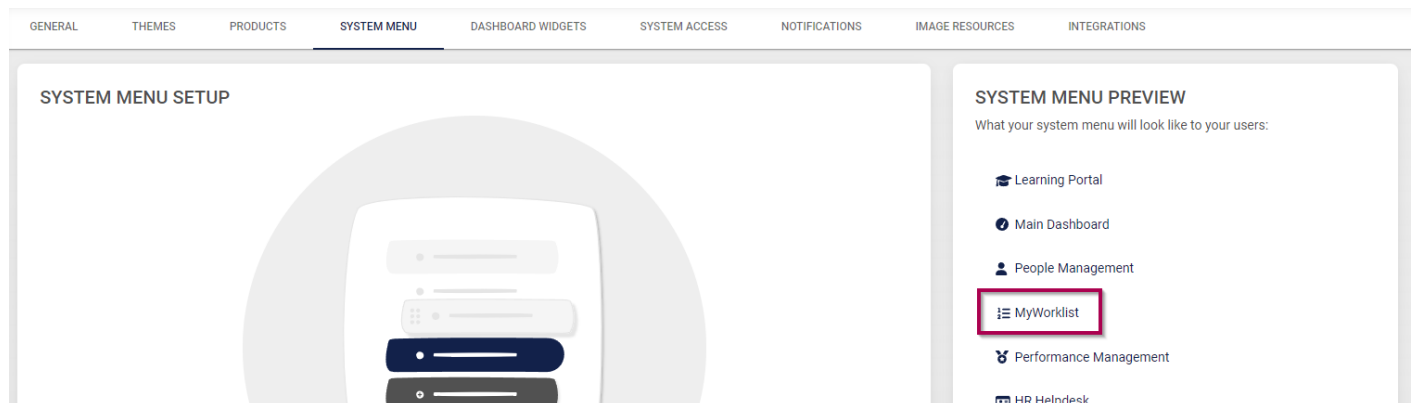
Overall Final Score  
0.00

---

# Ruleset Setup | System Menu

Add My Worklist to the System Menu to access the V8 page (#112943)

- The My Worklist menu item is now available



---

Revision #1

Created 7 May 2024 02:03:15 by Lee-Ann Janse van Rensburg

Updated 25 March 2025 13:14:09 by Lee-Ann Janse van Rensburg